Contents

GETTING STARTED ........................................................................................................ 1

CHAPTER 1: Welcome ................................................................................................... 3
 Resources ......................................................................................................................... 4
 Join the Conversation! ................................................................................................. 7

CHAPTER 2: About This Release .................................................................................. 9
 Installation ..................................................................................................................... 10
 Prelaunch Checklist ..................................................................................................... 11
 Your Login Credentials ............................................................................................... 13
 For Your Records ......................................................................................................... 14

CHAPTER 3: Your Magento Account ............................................................................ 15
 Creating an Account ..................................................................................................... 16
 Sharing Your Account ................................................................................................ 19

CHAPTER 4: Quick Tour ............................................................................................... 23
 B2B Quick Start ............................................................................................................ 24
  Build Loyalty .............................................................................................................. 26
  Differentiate and Personalize ..................................................................................... 27
  Empower with Self-Service Tools ............................................................................. 28
  Reduce Ordering Errors ............................................................................................ 29
  Increase Profitability ................................................................................................. 30
  Seize Market Opportunities ...................................................................................... 31
 Path to Purchase ......................................................................................................... 32
 Home Page .................................................................................................................. 34
 Catalog Page ............................................................................................................... 36
 Search Results ............................................................................................................ 38

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### Basic Configuration

**CHAPTER 5: B2B Basics** ................................................................. 58
- B2B Best Practices ............................................................... 59
- Configuring B2B Features ...................................................... 60
  - Configuring Quotes .......................................................... 62
- B2B Configuration Summary .................................................. 64

**CHAPTER 6: Store Admin** ............................................................ 66
- Admin Sign In ........................................................................ 67
- Your Admin Account ............................................................. 69
- Admin Sidebar ....................................................................... 70
- Admin Workspace .................................................................. 72
  - Dashboard ........................................................................ 78
  - Message Inbox .................................................................... 82
  - Global Search ...................................................................... 85
  - Grid Controls ...................................................................... 86
  - Grid Layout ........................................................................ 88
  - Actions Control .................................................................. 90
- Admin Session Lifetime .......................................................... 95

**CHAPTER 7: Store Details** ........................................................... 96
- Store Information .................................................................... 97
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Product Settings</td>
<td>257</td>
</tr>
<tr>
<td>Content</td>
<td>259</td>
</tr>
<tr>
<td>Configurations</td>
<td>260</td>
</tr>
<tr>
<td>Product Reviews</td>
<td>261</td>
</tr>
<tr>
<td>Images and Videos</td>
<td>262</td>
</tr>
<tr>
<td>Search Engine Optimization</td>
<td>263</td>
</tr>
<tr>
<td>Related Products, Up-Sells, and Cross-Sells</td>
<td>265</td>
</tr>
<tr>
<td>Related Products</td>
<td>265</td>
</tr>
<tr>
<td>Up-sells</td>
<td>267</td>
</tr>
<tr>
<td>Cross-sells</td>
<td>269</td>
</tr>
<tr>
<td>Product View Optimization</td>
<td>271</td>
</tr>
<tr>
<td>Customizable Options</td>
<td>272</td>
</tr>
<tr>
<td>Product in Websites</td>
<td>276</td>
</tr>
<tr>
<td>Design</td>
<td>278</td>
</tr>
<tr>
<td>Autosettings</td>
<td>279</td>
</tr>
<tr>
<td>Gift Options</td>
<td>280</td>
</tr>
<tr>
<td>Product In Shared Catalogs</td>
<td>280</td>
</tr>
<tr>
<td>Downloadable Information</td>
<td>281</td>
</tr>
<tr>
<td>Grouped Products</td>
<td>281</td>
</tr>
<tr>
<td>Bundle Items</td>
<td>282</td>
</tr>
<tr>
<td>Gift Card Information</td>
<td>282</td>
</tr>
<tr>
<td>CHAPTER 15: Managing Price</td>
<td>283</td>
</tr>
<tr>
<td>Advanced Pricing</td>
<td>284</td>
</tr>
<tr>
<td>Group Price</td>
<td>288</td>
</tr>
<tr>
<td>Special Price</td>
<td>290</td>
</tr>
<tr>
<td>Tier Price</td>
<td>295</td>
</tr>
<tr>
<td>Minimum Advertised Price</td>
<td>297</td>
</tr>
<tr>
<td>MAP Logic</td>
<td>297</td>
</tr>
<tr>
<td>Configuring MAP</td>
<td>298</td>
</tr>
<tr>
<td>Custom Pricing</td>
<td>303</td>
</tr>
<tr>
<td>CHAPTER 16: Managing Inventory</td>
<td>305</td>
</tr>
<tr>
<td>Topic</td>
<td>Page</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Stock Management Methods</td>
<td>306</td>
</tr>
<tr>
<td>Stock Options</td>
<td>311</td>
</tr>
<tr>
<td>Product Stock Options</td>
<td>313</td>
</tr>
<tr>
<td>Stock Message Scenarios</td>
<td>315</td>
</tr>
<tr>
<td>Product Page Stock Messages</td>
<td>315</td>
</tr>
<tr>
<td>Catalog Page Stock Messages</td>
<td>317</td>
</tr>
<tr>
<td>Product Alerts</td>
<td>319</td>
</tr>
<tr>
<td>Product Alert Run Settings</td>
<td>321</td>
</tr>
<tr>
<td>CHAPTER 17: Catalog Images and Video</td>
<td>323</td>
</tr>
<tr>
<td>Uploading Product Images</td>
<td>324</td>
</tr>
<tr>
<td>Adding Product Video</td>
<td>328</td>
</tr>
<tr>
<td>Media Gallery</td>
<td>331</td>
</tr>
<tr>
<td>Image Zoom</td>
<td>332</td>
</tr>
<tr>
<td>Light Boxes and Sliders</td>
<td>332</td>
</tr>
<tr>
<td>Placeholders</td>
<td>333</td>
</tr>
<tr>
<td>Watermarks</td>
<td>334</td>
</tr>
<tr>
<td>Swatches</td>
<td>337</td>
</tr>
<tr>
<td>Text-Based Swatches</td>
<td>337</td>
</tr>
<tr>
<td>Swatches in Layered Navigation</td>
<td>338</td>
</tr>
<tr>
<td>Creating Swatches</td>
<td>339</td>
</tr>
<tr>
<td>CHAPTER 18: Categories</td>
<td>345</td>
</tr>
<tr>
<td>Best Practices for Product Categories</td>
<td>346</td>
</tr>
<tr>
<td>Creating Categories</td>
<td>347</td>
</tr>
<tr>
<td>Root Categories</td>
<td>354</td>
</tr>
<tr>
<td>Hidden Categories</td>
<td>357</td>
</tr>
<tr>
<td>Modifying a Category</td>
<td>358</td>
</tr>
<tr>
<td>Scheduled Changes</td>
<td>359</td>
</tr>
<tr>
<td>Content Settings</td>
<td>360</td>
</tr>
<tr>
<td>Display Settings</td>
<td>361</td>
</tr>
<tr>
<td>Search Engine Optimization</td>
<td>362</td>
</tr>
<tr>
<td>Products in Category</td>
<td>364</td>
</tr>
</tbody>
</table>
### Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sorting Category Products</td>
<td>367</td>
</tr>
<tr>
<td>Design Settings</td>
<td>374</td>
</tr>
<tr>
<td>Category Permissions</td>
<td>376</td>
</tr>
<tr>
<td><strong>CHAPTER 19: Product Attributes</strong></td>
<td>383</td>
</tr>
<tr>
<td>Best Practices for Product Attributes</td>
<td>384</td>
</tr>
<tr>
<td>Creating Product Attributes</td>
<td>385</td>
</tr>
<tr>
<td>Adding an Attribute to a Product</td>
<td>390</td>
</tr>
<tr>
<td>Attribute Sets</td>
<td>396</td>
</tr>
<tr>
<td>Attribute Input Types</td>
<td>398</td>
</tr>
<tr>
<td>Date &amp; Time Options</td>
<td>400</td>
</tr>
<tr>
<td><strong>CHAPTER 20: Using a Flat Catalog</strong></td>
<td>403</td>
</tr>
<tr>
<td>Flat Catalog Setup</td>
<td>404</td>
</tr>
<tr>
<td><strong>CHAPTER 21: Shared Catalogs</strong></td>
<td>409</td>
</tr>
<tr>
<td>Configuring Catalog Price Scope</td>
<td>411</td>
</tr>
<tr>
<td>Creating a Shared Catalog</td>
<td>412</td>
</tr>
<tr>
<td>Set Pricing and Structure</td>
<td>417</td>
</tr>
<tr>
<td>Assign Companies</td>
<td>426</td>
</tr>
<tr>
<td>Managing a Shared Catalog</td>
<td>429</td>
</tr>
<tr>
<td>Adding Products to a Shared Catalog</td>
<td>430</td>
</tr>
<tr>
<td>Updating the General Information</td>
<td>433</td>
</tr>
<tr>
<td>Updating the Product Selection</td>
<td>436</td>
</tr>
<tr>
<td>Updating Custom Pricing</td>
<td>437</td>
</tr>
<tr>
<td>Updating Category Permissions</td>
<td>438</td>
</tr>
<tr>
<td><strong>MARKETING</strong></td>
<td>439</td>
</tr>
<tr>
<td><strong>CHAPTER 22: Marketing Menu</strong></td>
<td>441</td>
</tr>
<tr>
<td>Main Sections</td>
<td>442</td>
</tr>
<tr>
<td><strong>CHAPTER 23: Shopping Tools</strong></td>
<td>445</td>
</tr>
<tr>
<td>Opportunities to Engage</td>
<td>446</td>
</tr>
</tbody>
</table>
Email a Friend ................................................................. 447
Wish Lists ................................................................. 450
  Configuring Wish Lists ........................................ 451
  Updating Wish Lists .............................................. 453
  Sharing a Wish List ................................................. 456
  Wish List Search ...................................................... 458
Product Relationships .............................................. 460
Compare Products ....................................................... 461
Recently Viewed / Compared Products ...................... 463
Product Reviews ........................................................ 464
  Ratings ................................................................. 466

Promotions ............................................................. 468

CHAPTER 24: Catalog Price Rules .............................. 471
  Creating a Price Rule ............................................. 472
  Scheduled Changes for Catalog Price Rules .............. 480
  Price Rule with Multiple SKUs .............................. 481

CHAPTER 25: Cart Price Rules ..................................... 483
  Create a Cart Price Rule ......................................... 484
  Coupon Codes ....................................................... 497
    Configuring Coupon Codes .................................... 500
    Coupons Report .................................................. 501
  Scheduled Changes for Cart Price Rules .................. 506
  Free Shipping Promotion ...................................... 507
  Buy X Get Y Free ................................................... 511
  Discount with Minimum Purchase ............................ 515
  Discount with First Purchase .................................. 518

CHAPTER 26: Related Product Rules .......................... 523
  Creating a Related Product Rule ......................... 524
  Related Product Rule Priority ............................... 527
  Configuring Related Products Rules ...................... 528
Configuring Email Templates ........................................................................................................591
Sales Email .................................................................................................................................592
Configuring Company Email ........................................................................................................594
Payment Failed Email ..................................................................................................................598
Admin User Email ........................................................................................................................600
Customizing Email Templates .....................................................................................................601
Header Template ..........................................................................................................................602
Footer Template ............................................................................................................................606
Message Templates ........................................................................................................................610

CHAPTER 32: Email Reminders .....................................................................................................615
Creating Email Reminders .............................................................................................................616
Configuring Email Reminders .......................................................................................................623
Email Reminder Templates ............................................................................................................624
Configuring Email Communications ............................................................................................627

CHAPTER 33: Marketing Automation .............................................................................................629
Setting Up dotmailer ......................................................................................................................630
Creating a Campaign .....................................................................................................................635
Import Your Contacts .....................................................................................................................648
Schedule Your Campaign ..............................................................................................................650
Automate Your Campaign ..............................................................................................................653
Exclusion Rules ..............................................................................................................................660
Automation Studio ..........................................................................................................................662

CHAPTER 34: Sales Documents .....................................................................................................663
Preparing Your Invoice Logo ..........................................................................................................664
Adding Reference IDs to Header ....................................................................................................666
Customer Address Templates .........................................................................................................668

CHAPTER 35: Newsletters ..............................................................................................................671
Configuring Newsletters .................................................................................................................672
Newsletter Templates .....................................................................................................................674
Sending Newsletters ......................................................................................................................676
## Contents

### CHAPTER 41: Search Terms

- Popular Search Terms ................................................. 740
- Adding Search Terms .................................................. 742
- Search Terms Report ................................................... 744
- Search Synonyms ....................................................... 745

### CHAPTER 42: SEO Best Practices

- Meta Data ........................................................................ 749
  - Canonical Meta Tag ...................................................... 751
- Using a Site Map .......................................................... 753
- Site Map Configuration .................................................. 756
- Search Engine Robots ................................................... 759

### CHAPTER 43: URL Rewrites

- Configuring URL Rewrites .............................................. 762
- Automatic Product Redirects ......................................... 763
- Creating URL Rewrites .................................................. 765
  - Product Rewrites ...................................................... 766
  - Category Rewrites .................................................... 771
  - CMS Page Rewrites ................................................... 776
  - Custom Rewrites ...................................................... 780

### CHAPTER 44: Google Tools

- Google Analytics .......................................................... 786
- Google Content Experiments ........................................ 786
- Google Tag Manager ..................................................... 790
  - Creating a Tag to Track Conversions ......................... 795
  - Enhanced Ecommerce ................................................ 799
- Troubleshooting Tools .................................................. 804
- Google AdWords .......................................................... 806
## Contents

Getting Started with Amazon Sales Channel .............................................................. 882

About Amazon Sales Channel ................................................................. 882
About Amazon Marketplace ................................................................. 884
About Amazon and your Magento Catalog ......................................................... 887
Amazon Sales Channel: Best Practices and Limitations ........................................... 888

Onboarding Amazon Sales Channel .......................................................... 889

Pre-Setup Tasks ......................................................................................... 891
Creating Attributes for Amazon .................................................................. 893
Verify the Amazon API Key ......................................................................... 899
Store Integration .......................................................................................... 901

Onboarding: Listing Settings ................................................................. 902
Onboarding: Product Listing Actions .............................................................. 904
Onboarding: Third Party Listings ................................................................. 905
Onboarding: Listing Price .............................................................................. 907
Onboarding: (B2B) Business Price ................................................................. 909
Onboarding: Stock/Quantity ............................................................................ 910
Onboarding: Fulfilled By ................................................................................ 912
Onboarding: Catalog Search .......................................................................... 913
Onboarding: Product Listing Condition .......................................................... 915
Onboarding: Listing Rules .............................................................................. 919
Onboarding: Listing Preview .......................................................................... 920
Onboarding: Order Settings ............................................................................ 922
Onboarding: Pricing Rules .............................................................................. 925
Onboarding: Price Rule General Settings ......................................................... 926
Onboarding: Price Rule Conditions .................................................................. 928
Onboarding: Price Rule Actions ...................................................................... 931
Onboarding: Store Review ............................................................................... 937

Amazon Sales Channel Home ......................................................................... 944
Workspace Controls ...................................................................................... 945
Managing Stores ............................................................................................ 950
Amazon Store Dashboard ................................................................................ 953
Store Integration Settings ................................................................................ 954
<table>
<thead>
<tr>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Sales Channel Settings</td>
<td>955</td>
</tr>
<tr>
<td>Managing Attributes</td>
<td>957</td>
</tr>
<tr>
<td>Creating and Editing Amazon Attributes</td>
<td>959</td>
</tr>
<tr>
<td>Reviewing Amazon Attribute Values</td>
<td>963</td>
</tr>
<tr>
<td>Managing Listing Settings</td>
<td>966</td>
</tr>
<tr>
<td>Product Listing Actions</td>
<td>968</td>
</tr>
<tr>
<td>Third Party Listings</td>
<td>971</td>
</tr>
<tr>
<td>Listing Price</td>
<td>973</td>
</tr>
<tr>
<td>(B2B) Business Price</td>
<td>977</td>
</tr>
<tr>
<td>Stock/Quantity</td>
<td>980</td>
</tr>
<tr>
<td>Fulfilled By</td>
<td>983</td>
</tr>
<tr>
<td>Catalog Search</td>
<td>986</td>
</tr>
<tr>
<td>Product Listing Condition</td>
<td>989</td>
</tr>
<tr>
<td>Listing Rules</td>
<td>994</td>
</tr>
<tr>
<td>Listing Rule Preview</td>
<td>996</td>
</tr>
<tr>
<td>Managing Amazon Pricing</td>
<td>999</td>
</tr>
<tr>
<td>Add Pricing Rules</td>
<td>1001</td>
</tr>
<tr>
<td>Pricing Rule General Settings</td>
<td>1003</td>
</tr>
<tr>
<td>Price Rule Conditions</td>
<td>1006</td>
</tr>
<tr>
<td>Price Rule Actions</td>
<td>1009</td>
</tr>
<tr>
<td>Standard Price Rule Actions</td>
<td>1010</td>
</tr>
<tr>
<td>Intelligent Repricing Rule: Select Rule Type</td>
<td>1012</td>
</tr>
<tr>
<td>Intelligent Repricing Rule: Competitor Conditional Variances</td>
<td>1015</td>
</tr>
<tr>
<td>Price Adjustment</td>
<td>1019</td>
</tr>
<tr>
<td>Intelligent Repricing Rule: Floor Price</td>
<td>1021</td>
</tr>
<tr>
<td>Intelligent Repricing Rule: Optional Ceiling Price</td>
<td>1023</td>
</tr>
<tr>
<td>Standard Price Rule Examples</td>
<td>1025</td>
</tr>
<tr>
<td>Intelligent Repricing Rule Examples</td>
<td>1026</td>
</tr>
<tr>
<td>Price Scope</td>
<td>1033</td>
</tr>
<tr>
<td>Price Priority Logic</td>
<td>1034</td>
</tr>
<tr>
<td>Managing Amazon Listings</td>
<td>1039</td>
</tr>
<tr>
<td>Managing Product Listings by Tab</td>
<td>1039</td>
</tr>
<tr>
<td>Topic</td>
<td>Page</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Incomplete Listings</td>
<td>1042</td>
</tr>
<tr>
<td>New Third Party Listings</td>
<td>1045</td>
</tr>
<tr>
<td>Ready to List</td>
<td>1048</td>
</tr>
<tr>
<td>Inactive Listings</td>
<td>1051</td>
</tr>
<tr>
<td>Active Listings</td>
<td>1054</td>
</tr>
<tr>
<td>Overrides</td>
<td>1057</td>
</tr>
<tr>
<td>Ineligible Listings</td>
<td>1061</td>
</tr>
<tr>
<td>Ended Listings</td>
<td>1063</td>
</tr>
<tr>
<td>Managing Product Listings by Action</td>
<td>1065</td>
</tr>
<tr>
<td>Creating and Assigning Products</td>
<td>1069</td>
</tr>
<tr>
<td>Creating and Editing Overrides</td>
<td>1074</td>
</tr>
<tr>
<td>Creating an Alias Amazon Seller SKU</td>
<td>1080</td>
</tr>
<tr>
<td>Edit an Assigned ASIN</td>
<td>1083</td>
</tr>
<tr>
<td>Ending an Amazon Listing</td>
<td>1083</td>
</tr>
<tr>
<td>Update Required Info (Incomplete Listing)</td>
<td>1084</td>
</tr>
<tr>
<td>View Listing Details</td>
<td>1087</td>
</tr>
<tr>
<td>Managing Orders and Fulfillment</td>
<td>1090</td>
</tr>
<tr>
<td>Order Settings</td>
<td>1094</td>
</tr>
<tr>
<td>Amazon Order Details</td>
<td>1103</td>
</tr>
<tr>
<td>Common Order Processing Tasks</td>
<td>1105</td>
</tr>
<tr>
<td>Amazon Fulfillment Workflows</td>
<td>1107</td>
</tr>
<tr>
<td>Logs and Store Reports</td>
<td>1108</td>
</tr>
<tr>
<td>Listing Changes Log</td>
<td>1109</td>
</tr>
<tr>
<td>Communication Errors Log</td>
<td>1110</td>
</tr>
<tr>
<td>Competitive Price Analysis</td>
<td>1111</td>
</tr>
<tr>
<td>Listing Improvements</td>
<td>1112</td>
</tr>
</tbody>
</table>

**CONTENT**

**CHAPTER 47: Content Menu**

Menu Options .............................................. 1117
<table>
<thead>
<tr>
<th>Contents</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Content Elements</strong></td>
<td>1119</td>
</tr>
<tr>
<td><strong>CHAPTER 48: Pages</strong></td>
<td>1121</td>
</tr>
<tr>
<td>Core Content</td>
<td>1122</td>
</tr>
<tr>
<td>Default Pages</td>
<td>1124</td>
</tr>
<tr>
<td>Workspace Controls</td>
<td>1125</td>
</tr>
<tr>
<td>Page Search</td>
<td>1128</td>
</tr>
<tr>
<td>Page Actions</td>
<td>1131</td>
</tr>
<tr>
<td>Page Grid Layout</td>
<td>1132</td>
</tr>
<tr>
<td>Scheduled Changes</td>
<td>1134</td>
</tr>
<tr>
<td>Adding a New Page</td>
<td>1135</td>
</tr>
<tr>
<td>Switching Home Pages</td>
<td>1140</td>
</tr>
<tr>
<td>Media Storage</td>
<td>1141</td>
</tr>
<tr>
<td>Using the Editor</td>
<td>1145</td>
</tr>
<tr>
<td>Inserting a Link</td>
<td>1145</td>
</tr>
<tr>
<td>Inserting an Image</td>
<td>1146</td>
</tr>
<tr>
<td>Inserting a Widget</td>
<td>1147</td>
</tr>
<tr>
<td>Inserting a Variable</td>
<td>1148</td>
</tr>
<tr>
<td>Configuring the Editor</td>
<td>1149</td>
</tr>
<tr>
<td>Page Hierarchy</td>
<td>1150</td>
</tr>
<tr>
<td>Configuring Page Hierarchy</td>
<td>1151</td>
</tr>
<tr>
<td>Adding a Node</td>
<td>1152</td>
</tr>
<tr>
<td><strong>CHAPTER 49: Content Blocks</strong></td>
<td>1161</td>
</tr>
<tr>
<td>Adding New Blocks</td>
<td>1162</td>
</tr>
<tr>
<td>Adding Social Plugins</td>
<td>1164</td>
</tr>
<tr>
<td>Adding a Lightbox or Slider</td>
<td>1167</td>
</tr>
<tr>
<td>Positioning Blocks</td>
<td>1168</td>
</tr>
<tr>
<td>Using a Widget</td>
<td>1170</td>
</tr>
<tr>
<td>Using a Layout Update</td>
<td>1173</td>
</tr>
<tr>
<td><strong>CHAPTER 50: Banners</strong></td>
<td>1175</td>
</tr>
<tr>
<td>Creating a Banner</td>
<td>1176</td>
</tr>
</tbody>
</table>
Merging JavaScript Files ................................................................. 1239
Scheduling Design Changes .......................................................... 1240

CHAPTER 56: Content Staging .......................................................... 1242
Content Staging Workflow .............................................................. 1243
Scheduling an Update .................................................................. 1244
Staging Dashboard ..................................................................... 1249
Editing a Campaign ................................................................... 1251
Adding an Item .......................................................................... 1252
Previewsing a Campaign ............................................................. 1254

CUSTOMERS .............................................................................. 1257

CHAPTER 57: Customers Menu ......................................................... 1259
Menu Options ............................................................................ 1260
All Customers ........................................................................... 1261
Now Online ................................................................................ 1262

CHAPTER 58: Customer Accounts .................................................... 1265
Configuring Account Options ...................................................... 1267
Login Landing Page .................................................................... 1268
New Account Options ............................................................... 1269
Name and Address Options ....................................................... 1271
Password Options ..................................................................... 1273
Customer Session Lifetime ....................................................... 1275
Creating an Individual Account .................................................. 1277
Managing Customer Accounts .................................................... 1286
Updating a Customer Profile ...................................................... 1292
Customer Sign In ...................................................................... 1294
Resetting Passwords ................................................................ 1298
Account Dashboard .................................................................... 1300
My Quotes .................................................................................. 1302
Negotiating a Quote .................................................................. 1305
Contents

My Orders ............................................................................................................. 1312
My Downloadable Products ................................. ................................. 1316
Order by SKU ................................................................. ................................. 1318
My Requisition Lists ................................................................. ................................. 1320
Managing Requisition Lists ................................................................. ................................. 1323
My Wish List ................................................................. ................................. 1327
Address Book ................................................................. ................................. 1330
Account Information ................................................................. ................................. 1332
Stored Payment Methods ................................................................. ................................. 1333
Billing Agreements ................................................................. ................................. 1335
Store Credit ................................................................. ................................. 1336
Gift Card ................................................................. ................................. 1338
Company Profile ................................................................. ................................. 1339
Company Credit ................................................................. ................................. 1341
Company Structure ................................................................. ................................. 1342
Company Users ................................................................. ................................. 1343
My Product Reviews ................................................................. ................................. 1344
Newsletter Subscription ................................................................. ................................. 1346

CHAPTER 59: Company Accounts ......................................................................... 1347
Creating a Company Account ................................................................. ................................. 1348
Company Admin ................................................................. ................................. 1358
Sales Representative ................................................................. ................................. 1360
Approving a Company Account ................................................................. ................................. 1361
Company Structure ................................................................. ................................. 1363
Creating Company Teams ................................................................. ................................. 1365
Company Users ................................................................. ................................. 1369
Changing the Company Assignment ................................................................. ................................. 1372
Assigning Users to Teams ................................................................. ................................. 1373
Company Roles and Permissions ................................................................. ................................. 1376
Assigning User Roles ................................................................. ................................. 1379
Managing Company Accounts ................................................................. ................................. 1381
<table>
<thead>
<tr>
<th>Chapter Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updating a Company Profile</td>
<td>1388</td>
</tr>
<tr>
<td>CHAPTER 60: Customer Groups</td>
<td>1393</td>
</tr>
<tr>
<td>CHAPTER 61: Customer Segments</td>
<td>1397</td>
</tr>
<tr>
<td>Customer Segment Attributes</td>
<td>1398</td>
</tr>
<tr>
<td>Creating a Customer Segment</td>
<td>1399</td>
</tr>
<tr>
<td>Customer Segments in Price Rules</td>
<td>1404</td>
</tr>
<tr>
<td>Customer Segments with Banners</td>
<td>1406</td>
</tr>
<tr>
<td>Customer Segment Report</td>
<td>1408</td>
</tr>
<tr>
<td><strong>SALES</strong></td>
<td><strong>1409</strong></td>
</tr>
<tr>
<td>CHAPTER 62: Sales Menu</td>
<td>1411</td>
</tr>
<tr>
<td>Menu Options</td>
<td>1412</td>
</tr>
<tr>
<td><strong>Point of Purchase</strong></td>
<td><strong>1415</strong></td>
</tr>
<tr>
<td>CHAPTER 63: Instant Purchase</td>
<td>1417</td>
</tr>
<tr>
<td>CHAPTER 64: Quick Order</td>
<td>1421</td>
</tr>
<tr>
<td>CHAPTER 65: Shopping Cart</td>
<td>1425</td>
</tr>
<tr>
<td>Requesting a Quote</td>
<td>1426</td>
</tr>
<tr>
<td>Cart Configuration</td>
<td>1427</td>
</tr>
<tr>
<td>My Cart Link</td>
<td>1428</td>
</tr>
<tr>
<td>Cart Sidebar</td>
<td>1429</td>
</tr>
<tr>
<td>Redirect to Cart</td>
<td>1430</td>
</tr>
<tr>
<td>Quote Lifetime</td>
<td>1431</td>
</tr>
<tr>
<td>Minimum Order Amount</td>
<td>1432</td>
</tr>
<tr>
<td>Allow Reorders</td>
<td>1435</td>
</tr>
<tr>
<td>Cart Thumbnails</td>
<td>1436</td>
</tr>
<tr>
<td>Order by SKU</td>
<td>1438</td>
</tr>
<tr>
<td>Gift Options</td>
<td>1440</td>
</tr>
<tr>
<td>Gift Wrap</td>
<td>1442</td>
</tr>
</tbody>
</table>
Contents

PayPal Fraud Management Filter ................................................................. 1682
PayPal by Country ...................................................................................... 1683

CHAPTER 80: Other Payment Methods .................................................. 1685

Klarna ........................................................................................................... 1686
Klarna Customer Experience ................................................................. 1687
Setting Up Klarna ..................................................................................... 1689
Managing Your Account ........................................................................... 1697
Amazon Pay ............................................................................................... 1700
Amazon Pay Customer Experience ...................................................... 1701
Setting Up Amazon Pay ........................................................................... 1704
Using Amazon Seller Central ................................................................. 1712
Managing Amazon Pay Transactions .................................................... 1714
Amazon Pay Resources ............................................................................ 1716
Authorize.Net Direct Post (Deprecated) .................................................. 1718
Authorize.Net ............................................................................................ 1722
CyberSource .............................................................................................. 1726
eWAY ........................................................................................................... 1730
Worldpay .................................................................................................. 1733

CHAPTER 81: Basic Payment Methods .................................................. 1737

Check / Money Order ............................................................................... 1738
Cash On Delivery ...................................................................................... 1740
Payment on Account ................................................................................ 1742
Bank Transfer ............................................................................................ 1744
Purchase Order ........................................................................................ 1746
Zero Subtotal Checkout ............................................................................ 1748

CHAPTER 82: Fraud Protection ............................................................... 1751

Signifyd Guaranteed Fraud Protection ................................................... 1752

Shipping ..................................................................................................... 1754

CHAPTER 83: Shipping Settings .............................................................. 1756
Contents

Point of Origin ................................................................. 1757
Multiple Addresses ......................................................... 1758
Shipping Policy .............................................................. 1759

CHAPTER 84: Basic Shipping Methods .................................... 1762
Free Shipping .................................................................. 1763
Flat Rate .......................................................................... 1765
Table Rates ....................................................................... 1767
Dimensional Weight ........................................................ 1774

CHAPTER 85: Magento Shipping ........................................... 1776
Quick Look ....................................................................... 1779
Customer Experience ....................................................... 1781
Shipping Methods ............................................................ 1781
Click & Collect .................................................................. 1781
Collection Points .............................................................. 1782
Returns ........................................................................... 1782
Setting Up Magento Shipping ............................................ 1783
Locations ......................................................................... 1790
Shipping Partners ............................................................. 1794
Packaging ......................................................................... 1797
Shipping Experience Rules ................................................. 1802
Click & Collect .................................................................. 1813
Collection Points .............................................................. 1816
Troubleshooting ............................................................... 1816

CHAPTER 86: Carriers .......................................................... 1818

CHAPTER 87: Shipping Labels ............................................... 1820
Shipping Label Workflow .................................................. 1821
Configuring Shipping Labels .............................................. 1822
Creating Shipping Labels .................................................. 1826
Label Packages ................................................................... 1833
REPORTS .................................................................................................................. 1838

CHAPTER 88: Reports Menu ..................................................................................... 1840
Menu Options ........................................................................................................... 1841
Refresh Statistics ..................................................................................................... 1842

CHAPTER 89: Marketing Reports ............................................................................. 1844
Reports ...................................................................................................................... 1845

CHAPTER 90: Review Reports .................................................................................. 1846
Reports ...................................................................................................................... 1847

CHAPTER 91: Sales Reports .................................................................................... 1848
Reports ...................................................................................................................... 1849

CHAPTER 92: Customer Reports ............................................................................ 1852
Reports ...................................................................................................................... 1853

CHAPTER 93: Product Reports ............................................................................... 1854
Reports ...................................................................................................................... 1855

CHAPTER 94: Private Sales Reports ....................................................................... 1858
Reports ...................................................................................................................... 1859

CHAPTER 95: Marketing Automation ..................................................................... 1860

Business Intelligence ............................................................................................... 1861

CHAPTER 96: Advanced Reporting ....................................................................... 1863

CHAPTER 97: Magento BI Essentials ..................................................................... 1871
Dashboards ............................................................................................................... 1874
Report Builder ......................................................................................................... 1878
Visual Report Builder ............................................................................................... 1879
Filters ......................................................................................................................... 1884
Formulas ..................................................................................................................... 1888
Cross-Border Price Consistency ........................................................................... 1962
Tax Rules .................................................................................................................. 1964
Tax Classes ................................................................................................................ 1968
  Configuring Tax Classes ......................................................................................... 1969
  Adding New Tax Classes ......................................................................................... 1970
  Default Tax Destination ........................................................................................... 1972
  EU Place of Supply for Digital Goods ...................................................................... 1973
Fixed Product Tax ...................................................................................................... 1974
  Configuring FPT ..................................................................................................... 1975
Price Display Settings ............................................................................................... 1980
Tax Zones and Rates ................................................................................................. 1983
  Import/Export Tax Rates ......................................................................................... 1985
Value Added Tax (VAT) ............................................................................................... 1988
  Configuring VAT .................................................................................................. 1989
  VAT ID Validation .................................................................................................. 1992
    Configuring VAT ID Validation ........................................................................... 1994
Tax Quick Reference .................................................................................................. 1999
International Tax Guidelines ..................................................................................... 2001
  U.S. Tax Guidelines ............................................................................................... 2003
  Canadian Tax Guidelines ....................................................................................... 2005
  EU Tax Guidelines ................................................................................................. 2010
Warning Messages ..................................................................................................... 2016
Calculation Settings ................................................................................................. 2016
Discount Settings ...................................................................................................... 2017
CHAPTER 103: Currency ............................................................................................ 2018
  Currency Configuration ........................................................................................... 2019
  Currency Symbols .................................................................................................. 2023
  Updating Currency Rates ......................................................................................... 2024
CHAPTER 104: Attributes ........................................................................................ 2026
  Customer Attributes ............................................................................................... 2027
  Customer Address Attributes .................................................................................. 2037
Customer Address Templates ................................................................. 2045
Product Attributes .............................................................................. 2047

System ................................................................................................. 2054

CHAPTER 106: System Menu ............................................................... 2056
  Menu Options .................................................................................. 2057

CHAPTER 107: Data Transfer ............................................................... 2060
  Working with CSV Files ................................................................. 2061
  Data Validation .............................................................................. 2064
  Import ............................................................................................. 2066
    Import History ........................................................................... 2071
    Importing Product Images ......................................................... 2072
    Importing Tier Prices ............................................................... 2073
    Import Guidelines ..................................................................... 2077
  Export ............................................................................................. 2079
    Export Criteria ........................................................................... 2081
      Export Filters .......................................................................... 2082
      Exclude Attributes ................................................................... 2082
  Data Transfer Examples .................................................................. 2083
    Importing Configurable Products ............................................. 2083
    Importing Tier Prices ............................................................... 2089
  Scheduled Import/Export ............................................................... 2092
    Scheduling an Import ................................................................ 2093
    Scheduling an Export ................................................................ 2099
  Product Attribute Reference ........................................................... 2104
    Complex Data ........................................................................... 2115
    Advanced Pricing Data ............................................................. 2117
    Customer Attribute Reference ................................................... 2119

CHAPTER 108: Integrations ................................................................. 2122
  Onboarding Workflow ..................................................................... 2123
  Integration with ERP Systems ....................................................... 2127
Encryption Key .................................................................................................................. 2191
Session Validation ............................................................................................................. 2193
Browser Capabilities Detection ...................................................................................... 2195

CHAPTER 111: Tools ....................................................................................................... 2196

Cache Management ........................................................................................................ 2197
  Full-Page Cache .......................................................................................................... 2204
Index Management ........................................................................................................ 2206
  Index Trigger Events ................................................................................................... 2210
Backups .......................................................................................................................... 2213
Cron (Scheduled Tasks) .................................................................................................. 2215
Developer Tools ............................................................................................................ 2217
  Action Log .................................................................................................................. 2218
    Action Log Report .................................................................................................... 2218
    Archive ..................................................................................................................... 2220
    Bulk Actions ............................................................................................................ 2221
Amazon Pay Logs .......................................................................................................... 2222
  Frontend Development Workflow ............................................................................... 2224
Using Static File Signatures ........................................................................................ 2225
Optimizing Resource Files ............................................................................................ 2226
Developer Client Restrictions ....................................................................................... 2229
Template Path Hints ...................................................................................................... 2230
Translate Inline .............................................................................................................. 2232
Setup Wizard .................................................................................................................. 2236
Setup Tools ..................................................................................................................... 2237
  Extension Manager ..................................................................................................... 2238
  Module Manager ......................................................................................................... 2242
System Upgrade ............................................................................................................ 2247
System Config ................................................................................................................ 2250

CHAPTER 112: Support ................................................................................................... 2252

Data Collector .................................................................................................................. 2253
System Reports .............................................................................................................. 2255
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 for B2B 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 are here!)

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. To page through the PDF as a book, set your reader’s View > Page Display to “Two Page View”. See the Documentation Archive for previous versions of the user guide. Updated: 12 February, 2019
GETTING STARTED
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.
CHAPTER 1:
Welcome

Welcome to the next generation of the world’s leading digital commerce platform! Magento for B2B 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.

Welcome to the business-to-business implementation of the world’s leading digital commerce platform! Magento Commerce B2B is a set of modules that extend the functionality of Magento Commerce 2.x to meet the needs of companies who sell directly to other companies, rather than to consumers. Magento for B2B Commerce combines the convenience of business-to-consumer commerce with advanced account management, robust inventory control, negotiated pricing, bulk order management, and more. Magento’s Admin back office 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.

Magento Advantage

Why choose Magento? Just ask our customers. The world’s biggest brands love Magento for its flexibility, because today’s consumers and their buying patterns are changing by the minute. Only Magento—a flexible and agile—can help you adapt and thrive. With a global ecosystem of 100,000 developers and a network of 300+ highly trained solution partners, Magento boosts your online sales while maximizing gross margins.Magento businesses sell more at a lower TCO than merchants on competitive commerce platforms. Here’s how the Magento Advantage can work for you.
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.
CHAPTER 1: Welcome

Google+
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 Magento 2.2.x versions.
Installation

To download and install the latest release of Magento 2.2.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.
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 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.

3. Under Personal Information, do the following:
   a. Enter your First Name, Last Name, and Email Address.

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.
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**.

---

### Magento Account Password Requirements

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<tr>
<td>Password</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

To set up a shared account:

1. Before you begin, get the following information from the Magento account of the new user:
   - Account ID
     - The Account ID is located in the upper-left corner of the Magento tab, just above the Log Out link.
   - Email address associated with the account

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 shared user’s Magento account.
   - Enter the Email address that is associated with the new shared 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 to the new user with instructions to access the shared account.
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.

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 examine the main components of Magento for B2B Commerce, and 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 consider how Magento for B2B Commerce can be used to attract and engage customers, increase the average order, and build loyalty and advocacy.

![Customer Journey Diagram]

Customer Journey
B2B Quick Start

Follow these links to learn more about each component of Magento for B2B Commerce.

**Basics**

Learn the basics of Magento B2B, and how it differs from B2C. Magento B2B gives you the ability to sell business-to-business while also selling from business-to-consumer.

**Configuration**

Easily configure B2B features, company accounts, requisition lists, email, and quotes.

**Company Accounts**

Allow companies to create and maintain their own accounts with teams of buyers, roles, and levels of permission.

**Shared Catalog**

Offer a curated product selection with custom pricing for specific companies, while continuing to offer the standard catalog with regular pricing for general customers.

**Quick Order**

Reduces the order process to several clicks for shoppers who know the name or SKU of the products they want to order. SKUs can be entered manually or uploaded from a CSV file.
Requisition Lists

Maintain up to 99 different requisition lists to save time with frequently ordered products. Add items directly to the cart, or transfer items from one requisition list to another.

Quotes

Buyers can negotiate directly with the seller for a custom discount. The system saves a snapshot of the catalog, and the history of all activity related to the quote.

Payment On Account

Give companies the convenience of charging purchases to their account, up to the credit limit that you determine for the company.

Integration

Magento for B2B Commerce includes a flexible application programming interface (API) that integrates with a variety of ERP solutions from Magento partners.
Build Loyalty

Friction-Free Purchasing

Magento’s self-service model makes it easy to build loyalty for fast, friction-free purchasing.

Fast Reordering

Create new orders based on previous orders from the convenience of your customer account.

Order by SKU

Add individual products to your cart by SKU and quantity, or import a list of products from a file.

Request a Quote

Authorized company buyers can initiate a price negotiation by requesting a quote from the shopping cart.

Punch Out Solutions

Establish new customers with third-party solutions such as PunchOut Catalogs and PunchOut2Go.
Differentiate and Personalize

Create Custom Experiences

Magento offers a rich set of tools to create personalized experiences across multiple digital touchpoints, based on customer activity and profile.

Custom Catalog and Price Lists

Offer a curated product selection with custom pricing for specific companies, while continuing to offer the standard catalog with regular pricing for general customers.

Targeted Segmentation

Optimize your marketing initiatives with dynamic content, promotions, and banner based on properties such as customer address, order history, and shopping cart contents.

Smart Shopping Rules

Customize the shopping experience with price rules and promotions that trigger at the product or shopping cart level.

Customer Groups

Offer different products and pricing according to customer group or shared catalog. Determine which discounts are available, and the tax class that applies to the order.

Maintain Multiple Tailored Websites

Maintain multiple tailored sites based on brand, geography, channel partner, or account. Introduce new market and languages, and track analytics from a single Admin.
Empower with Self-Service Tools

Self-Service Tools

Magento’s self-service model empowers customers to manage their own accounts and ordering process.

Corporate Accounts

the company administrator can set up the company structure and teams of users.

Buyer Roles and Permissions

Set up company buyers with various levels of permission to specific purchasing operations, sales information, and resources.

Payments On Account

Allow companies to make purchases charged to their account, up to the credit limit that is specified in their profile.

Negotiated Quotes

Company buyers can request a quote from the shopping cart, and negotiate with the seller to reach an acceptable price per line item.

Quote Tracking

A detailed history of all activity related to quotes, including all interactions between buyer and seller during the negotiation process is available from the company’s account and from the store’s back office Admin.

Order History

From the convenience of the account dashboard, customers can create new orders based on past orders, track shipments, and print orders, invoices, shipments and refunds.
Reduce Ordering Errors

Streamlined Order Process

Quick Order reduces the process to several clicks. Magento offers multiple ways to configure the shopping cart and checkout process, to eliminate manual data entry, and reduce costly ordering errors.

Assisted Sales

Assign a dedicated sales rep to each company account, who can access the customer’s shopping cart in real time, and offer personal assistance over the phone.

Complete Inventory Visibility

Add Magento Order Management for complete inventory visibility with accurate, real-time inventory levels from all locations and supply chain partners. Drop-ship scheduled deliveries, and track inventory across multiple warehouse locations.

SKU and Inventory Validation

Magento reduces ordering errors by automatically verifying the SKU and availability of all items before an order is submitted. Merchants can set the out of stock threshold for each product, set backorder levels, and manage the messaging that appears in the storefront.

Custom Catalogs and Price Lists

Maintain different “shared” catalogs with custom pricing for specific companies.

Bulk Orders

Create bulk pricing tiers with per-unit costs and discounts according to order size. Buyers can reorder from previous orders, or upload order data directly to the shopping cart.
Increase Profitability

Maintain Peak Performance

With Magento Cloud hosting, your site is always optimized, and ready to scale up to meet demand on the biggest sales day of the year.

Smart-Source Inventory

Increase profitability with smart-source inventory, and provide an “endless aisle” of product with Magento Order Management. Supports both online and brick and mortar sales.

Automated Business Rules

Set up automated business rules that define product relationships, and use price rules that trigger discounts based on a variety of conditions.

Backend Integration

Integrate with Enterprise Resource Planning (ERP) other backend systems with our extensive APIs and open, modern platform.
Seize Market Opportunities

**Business Intelligence**

Use Magento Business Intelligence to visually analyze your data, identify trends, and make smarter decisions. Discover hidden opportunities in long-tail market segments that can be targeted and developed over time.

**Geographic Locations**

Expand into new markets and geographic locations with multiple sites and stores for different locales and markets.

**New Visions and Product Lines**

Create a specialized sites for a specific brand or product. Hold an invitation-only event to launch a brand, and offer a count-down ticker to member-only sales.

**B2B and B2C**

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!
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
CHAPTER 4: Quick Tour

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.

<table>
<thead>
<tr>
<th>Callouts</th>
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<tr>
<td>• Search Criteria</td>
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<td>• Sort By</td>
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<td>• Search Results</td>
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<td>• Show per Page</td>
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<tr>
<td>• Next Page</td>
</tr>
<tr>
<td>• Advanced Search</td>
</tr>
</tbody>
</table>
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
CHAPTER 4: Quick Tour

Magento for B2B Commerce User Guide
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
CHAPTER 4: Quick Tour

Path to Purchase

Shopping Cart Page
Customer Journey

Attract New Customers

Magento for B2B 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 for B2B 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 for B2B 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.
Increase Average Order Value

Magento for B2B 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

Use catalog and shopping cart price rules to create promotions that kick into gear when a set of conditions is met. 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.
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.

Instant Purchase

Simplify ordering and boost conversion rates by allowing your customers to speed through checkout by using stored payment and shipping information.

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.

Order Processing

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

Multiple Payment Options

Magento for B2B 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.

Magento Shipping

Offer seamless access to global carrier networks, and use customer experience rules to streamline operations and automate processes.
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.

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.
Retain Customers

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.

Email Marketing Automation

Send professionally designed, dynamic email campaigns with live data from your Magento store, powered by dotmailer.

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.
Build Loyalty & Advocacy

Give customers a direct connection to your brand by allowing them to create customer accounts where they can see their purchase history, wish lists, 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.

Advanced Reporting

Gain valuable insights at a glance with dynamic product, order, and customer reports, powered by Magento Business Intelligence.

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 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.
Basic 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:
B2B Basics

Unlike the standard business-to-consumer model, Magento for B2B Commerce is designed to meet the needs of merchants whose customers are primarily companies—possibly with complex organizational structures and multiple users with various roles and levels of permission. A typical B2B customer might be the merchant of a retail store, or a buyer making purchases on behalf of a company. In both cases, the transaction takes place between your business and theirs. In addition, you might also sell direct to the consumer. Magento Commerce with B2B supports both B2B and B2C models.

B2B merchants often require capabilities such as flexible bulk and per-unit pricing, the ability to issue quotes with negotiated pricing, and to place orders from a requisition list. A typical order might be charged to the customer’s company account, and fulfilled from multiple warehouses.

To learn about Magento for B2B Commerce from a technical perspective, see the B2B Developer Guide.
B2B Best Practices

*Introducing B2B Commerce Best Practices Book* is a fifty-page ebook that you can download from our site. The book includes insights and planning tips that will help you:

- Influence Buying Habits
- Reduce Expenditure
- Grow Revenue

To learn more, see *Introducing B2B Commerce Best Practices Book* in the Magento blog.
Configuring B2B Features

Each website in your Magento installation can be configured to make available some, or all, of the following B2B features from the storefront.

- Company
- Quick Order
- Requisition List
- Quotes

When support for customer companies is enabled, shared catalogs, negotiable quotes, and default B2B payment methods become available.

By default, all B2B features are initially disabled. However, they’re always available from the Admin, regardless of whether they’re enabled or disabled for the storefront. For a complete list of B2B configuration settings, see: B2B Configuration Summary.

To configure B2B Features:

1. On the Admin sidebar, tap Stores. Then under Settings, choose Configuration.

   If you have a multisite installation, set the Store View control in the upper-left corner to the website where the configuration applies.

2. In the panel on the left under General, choose B2B Features. Then, do the following:

   a. If you want your customers to be able to manage their own company accounts, set Enable Company to “Yes”.

      Additional fields to enable Shared Catalog and B2B Quote appear, as well as a new section for configuring Default B2B Payment Methods.

   b. To make custom pricing available for different companies, set Enable Shared Catalog to “Yes”.

      Enabling shared catalogs also enables category permissions for all stores.

   c. To give company buyers the ability to negotiate prices, set Enable B2B Quote to “Yes”.
3. To establish a default payment method for B2B orders, set **Applicable Payment Methods** to one of the following:

   - All Payment Methods
   - Specific Payment Methods

   For Specific Methods, hold down the Ctrl key, and click the **Payment Methods** that you want to make available to your customers.

   The list of payment methods shows which are currently enabled or disabled. In addition to the standard payment methods, the list also includes the following:

   - No Payment Information is Required
   - Payment on Account
   - Stored Accounts
   - Stored Cards

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

The quote configuration determines the minimum required order amount for quote requests, the quote lifetime, and the supported file formats for attached files.

To configure quotes:

1. On the Admin sidebar, choose Stores. Then under Settings, choose Configuration.
2. In the sidebar on the left, expand the Sales section. Then, choose Quotes.
3. Expand the General section. Then, do the following:

   a. Enter the Minimum Amount in the shopping cart that must be met before a request for a quote can be submitted.

   b. In the Minimum Amount Message text box, enter the message that you want to appear when the shopping cart total doesn’t meet the minimum required amount.

   c. In the Default Expiration Period fields, enter the number of days, weeks, or months that a quote is to remain valid.
4. Expand the Attached files section. Then, do the following:

a. In the File formats for upload field, enter the suffix of each file type that you support for files that are attached to a quote. Enter each file suffix in lowercase, and separated by a comma.

By default, the following formats are supported: doc, docx, xls, xlsx, pdf, txt, jpg, png, jpeg

b. In the Maximum file size field, enter the maximum size of an attached file, in megabytes. The value you enter might be overridden by the server setting.

5. When complete, tap Save Config.
# B2B Configuration Summary

Follow the links in this list to find related configuration topics in the user guide.

## Configuration Settings

<table>
<thead>
<tr>
<th>SECTION</th>
<th>SETTINGS</th>
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<tbody>
<tr>
<td><strong>General</strong></td>
<td><strong>B2B Features</strong></td>
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<td></td>
<td>Enable Company</td>
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<td>Enabled Shared Catalog</td>
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<td>Enable B2B Quote</td>
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<td>Default B2B Payment Methods</td>
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<td>Enable Quick Order</td>
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<td>Enable Requisition Lists</td>
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<tr>
<td><strong>Customers</strong></td>
<td><strong>Company Configuration</strong></td>
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<td>General</td>
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<td>Allow Company Registration from the Storefront</td>
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<td><strong>Email Options - Company Registration</strong></td>
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<td>Company Status Change</td>
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<td>Company Credit</td>
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<td>General</td>
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<td>File format for upload</td>
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<td>Maximum file size</td>
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CHAPTER 6:
Store Admin

Your store Admin is the password-protected back office where you, as the merchant, 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 Sidebar and Dashboard

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. To learn more, see: Configuring Admin Security.

In addition to the default Admin account, you can create as many additional accounts that are needed to manage the store and to support customer accounts. Each account can be associated with a specific role and level of access, based on the person’s business need to know. The email address that is associated with each Admin account must be unique.
Admin Sign In

You will first learn how to sign in and out of the Admin and how 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.

Depending on Admin configurations, you may also need to resolve a CAPTCHA or reCAPTCHA, or enter a configured Two-Factor Authentication code.

When entering your credentials, the username and password may automatically populate if your browser is set to use the autocomplete function. If enabled, you can save your credentials for the Magento Admin login page.

![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. These values may populate depending on your browser’s autocomplete settings.

3. (Optional) You may need to resolve a CAPTCHA or reCAPTCHA or enter a configured Two-Factor Authentication code.

4. Tap Login.
To reset your password:

1. If you forget your password, click the **Forgot Your Password?** link. Then, enter the **Email Address** that is associated with the Admin account.

2. 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.**

The Sign-In page displays, 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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: Configuring Admin Security.</td>
</tr>
</tbody>
</table>
Your Admin Account

Your Admin account was initially set up during the installation, and might contain initial placeholder information, or information from the sample data. 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.
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.

Admin Startup Page
Displays the Admin startup page, which by default is the Dashboard.

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.

Catalog
The Catalog menu is used to create products and define categories.

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 Stores menu includes tools to configure and maintain every aspect of your store, including multisite installation settings, taxes, currency, product attributes, and customer groups.

System

The System menu includes tools to manage system operations, 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 default start up page can be set in the configuration. Many Admin pages have a grid that lists the data for the section, with a set of tools to search, sort, filter, select, and apply actions. By default, the Dashboard is the startup page for the Admin. However, you can choose any other page to appear as the startup page when you log in. You can tap the Magento logo in the Admin sidebar to return to the Admin startup page.

To change the Admin startup page:

1. On the Admin sidebar, choose Stores. Then under Settings, choose Configuration.
2. In the panel on the left under Advanced, choose Admin.
3. Expand the Startup Page section.
4. Set Startup Page to the page that you want to appear first after you log in to the Admin.
5. When complete, tap Save Config.
Workspace Controls

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>The Global Search box can be used to find any value in the database, including product, customer, and order records.</td>
</tr>
<tr>
<td>Sort</td>
<td>The header of each column can be used to sort the list in ascending or descending order.</td>
</tr>
<tr>
<td>Filters</td>
<td>Defines a set of search parameters that determines the records that appear in the grid. In addition, the filters in the header of some columns 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.</td>
</tr>
<tr>
<td>Default View</td>
<td>Determines the default column layout of the grid.</td>
</tr>
<tr>
<td>Columns</td>
<td>Determines the selection of columns and their order in the grid. The column layout can be changed and saved as a &quot;view.&quot; By default, only some of the columns are included in the grid.</td>
</tr>
<tr>
<td>Paginate</td>
<td>The pagination controls are used to view the additional pages of results.</td>
</tr>
<tr>
<td>Actions</td>
<td>The Actions control applies an operation to all selected records. To select individual records, mark the checkbox in the first column of each row, or use the Select control.</td>
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<tr>
<td>Select</td>
<td>The Select control is used to select multiple records that are to be the target of action. Options: Select All / Deselect All</td>
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<thead>
<tr>
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<th>PAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td>Operations</td>
</tr>
<tr>
<td></td>
<td>Orders</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
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<td></td>
<td>Shipments</td>
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<td></td>
<td>Credit Memos</td>
</tr>
<tr>
<td></td>
<td>Billing Agreements</td>
</tr>
<tr>
<td></td>
<td>Transactions</td>
</tr>
<tr>
<td>Catalog</td>
<td>Products</td>
</tr>
<tr>
<td></td>
<td>Categories</td>
</tr>
</tbody>
</table>

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<tr>
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<td>Customers</td>
<td>All Customers</td>
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<tr>
<td></td>
<td>Now Online</td>
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<tr>
<td>Marketing</td>
<td>Promotions</td>
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<tr>
<td></td>
<td>Catalog Price Rules</td>
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<td></td>
<td>Related Products Rules</td>
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<td>Cart Price Rules</td>
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<td>Gift Card Accounts</td>
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<td>Private Sales</td>
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<td>Events</td>
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<td>Invitations</td>
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<td>Communications</td>
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<td>Widgets</td>
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<td>Design</td>
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<td>Configuration</td>
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<td>Schedule</td>
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<td>Content Staging</td>
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<td>Dashboard</td>
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**CHAPTER 6: Store Admin**  
Admin Workspace

**Magento for B2B Commerce User Guide**  
74
### Potential Startup Pages (cont.)

<table>
<thead>
<tr>
<th>SIDEBAR</th>
<th>PAGES</th>
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<tbody>
<tr>
<td>Reports</td>
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<td><strong>Marketing</strong></td>
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<td>Search Terms</td>
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<td>Abandoned Carts</td>
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<td>Newsletter Problem Reports</td>
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<td>Reviews</td>
<td>By Customers</td>
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<td></td>
<td>By Products</td>
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<td>Sales</td>
<td>Orders</td>
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<td>Tax</td>
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<td>Invoiced</td>
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<td>Shipping</td>
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<td>Refunds</td>
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<td>Coupons</td>
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<td>PayPal Settlement</td>
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<td>Braintree Settlement</td>
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<td>Order Total</td>
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<td>Order Count</td>
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<td>New</td>
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<td>Wish Lists</td>
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<td>Views</td>
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<td></td>
<td>Bestsellers</td>
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<td>Low Stock</td>
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<td>Ordered</td>
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<td>Downloads</td>
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<td>Private Sales</td>
<td>Invitations</td>
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<td>Invited Customers</td>
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<td>Conversions</td>
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<td>Statistics</td>
<td>Refresh Statistics</td>
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<td>Business Intelligence</td>
<td>Advanced Reporting</td>
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<td>BI Essentials</td>
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</table>
## Potential Startup Pages (cont.)

<table>
<thead>
<tr>
<th>SIDEBAR</th>
<th>PAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stores</td>
<td>All Stores</td>
</tr>
<tr>
<td></td>
<td>Configuration</td>
</tr>
<tr>
<td></td>
<td>Terms and Conditions</td>
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<td>Order Status</td>
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<td>Taxes</td>
<td>Tax Rules</td>
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<td>Tax Zones and Rates</td>
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<td>Currency</td>
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<td>Rating</td>
</tr>
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<td>Other Settings</td>
<td>Reward Exchange Rates</td>
</tr>
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<td></td>
<td>Gift Wrapping</td>
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<tr>
<td></td>
<td>Gift Registry</td>
</tr>
<tr>
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<td>Customer Groups</td>
</tr>
<tr>
<td>System</td>
<td>Data Transfer</td>
</tr>
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<td>Import</td>
</tr>
<tr>
<td></td>
<td>Export</td>
</tr>
<tr>
<td></td>
<td>Import/Export Tax Rates</td>
</tr>
<tr>
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<td>Import History</td>
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<tr>
<td>Extensions</td>
<td>Integrations</td>
</tr>
<tr>
<td>Tools</td>
<td>Cache Management</td>
</tr>
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<td></td>
<td>Index Management</td>
</tr>
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<td></td>
<td>Backups</td>
</tr>
<tr>
<td></td>
<td>Web Setup Wizard</td>
</tr>
<tr>
<td>Support</td>
<td>Data Collector</td>
</tr>
<tr>
<td></td>
<td>System Report</td>
</tr>
<tr>
<td>Permissions</td>
<td>All Users</td>
</tr>
<tr>
<td></td>
<td>Locked Users</td>
</tr>
<tr>
<td></td>
<td>User Roles</td>
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</tbody>
</table>
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<table>
<thead>
<tr>
<th>SIDEBAR</th>
<th>PAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Logs</td>
<td></td>
</tr>
<tr>
<td>Other Settings</td>
<td>Notifications</td>
</tr>
<tr>
<td></td>
<td>Custom Variables</td>
</tr>
<tr>
<td></td>
<td>Manage Encryption Key</td>
</tr>
</tbody>
</table>

Find Partners & Extensions
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.
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, clear the Use system value checkbox and set Enable Charts to “Yes.”

   ![Enable Charts](image)

   **Enable Charts**

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

   ![Beginning Date](image)

   **Beginning Date**
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:
   a. Clear the Use system value checkbox.
   b. Set Use Aggregated Data (beta) as follows:
      - For real-time data, choose "Yes."
      - For historical data, choose "No."

![Dashboard settings](image)

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. Clear the Use system value checkboxes.
4. 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 settings](image)

2. When complete, tap Save Config.
# Dashboard Reports

<table>
<thead>
<tr>
<th>REPORT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>The Dashboard reports on Lifetime Sales, Revenue, Tax, Shipping, and Quantity for the time period specified.</td>
</tr>
<tr>
<td>Orders</td>
<td>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.</td>
</tr>
<tr>
<td>Amounts</td>
<td>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.</td>
</tr>
<tr>
<td>Search Terms</td>
<td>The last five search terms, and top five search terms appear on the left.</td>
</tr>
<tr>
<td>Products</td>
<td>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.</td>
</tr>
<tr>
<td>Customers</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

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.

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.
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.

```
Notifications

Use HTTPS to Get Feed
No

Update Frequency
1 Hour

Last Update
Jun 9, 2017 11:35:17 AM
```

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

The magnifying 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.

To find a match:

1. In the header, tap the magnifying 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. In addition, date from the current view of most grids can be exported to a CSV or XML file.

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.
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**.

To export data:

1. Select the records that you want to export.

   Product data cannot be exported from the grid. To learn more, see **Export**.

2. On the **Export** () menu in the upper-right corner, choose one of the following file formats:
   - CSV
   - Excel XML
3. Tap **Export**.

4. Look for the downloaded file of exported data at the bottom of your browser window. Then, open the file from the pop-up menu.

### 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.

![Catalog](image)

**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.

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

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All</td>
<td>Marks the checkbox of all records in the list.</td>
</tr>
<tr>
<td>Unselect All</td>
<td>Clears the checkbox of all records in the list.</td>
</tr>
<tr>
<td>Select All on This Page</td>
<td>Marks the checkbox of records on the current page.</td>
</tr>
<tr>
<td>Deselect All on This Page</td>
<td>Clears the checkbox of records on the current page.</td>
</tr>
</tbody>
</table>

### Actions by Grid

<table>
<thead>
<tr>
<th>MENU</th>
<th>LIST</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALES</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Orders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cancel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hold</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unhold</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print Invoices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print Packing Slips</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print Credit Memos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print All</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print Shipping Labels</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Move to Archive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invoices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PDF Invoices</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Shipment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PDF Shipments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Print Shipping Labels</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Credit Memos</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PDF Credit Memos</td>
</tr>
<tr>
<td>PRODUCTS</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Catalog</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change Status</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update Attributes</td>
</tr>
<tr>
<td>CUSTOMERS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>All Customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Subscribe to Newsletter</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unsubscribe from Newsletter</td>
</tr>
</tbody>
</table>
### Actions by Grid (cont.)

<table>
<thead>
<tr>
<th>MENU</th>
<th>LIST</th>
<th>ACTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Assign a Customer Group</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>Companies</td>
<td>Set Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Block</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Convert Credit</td>
</tr>
</tbody>
</table>

**MARKETING**

**Communications**

<table>
<thead>
<tr>
<th>Newsletter Subscribers</th>
<th>Unsubscribe</th>
<th>Delete</th>
</tr>
</thead>
</table>

**SEO & Search**

<table>
<thead>
<tr>
<th>Search Synonyms</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Terms</td>
<td>Delete</td>
</tr>
</tbody>
</table>

**User Content**

<table>
<thead>
<tr>
<th>Reviews</th>
<th>Delete</th>
<th>Update Status</th>
</tr>
</thead>
</table>

**CONTENT**

**Elements**

<table>
<thead>
<tr>
<th>Pages</th>
<th>Delete</th>
<th>Disable</th>
<th>Enable</th>
<th>Edit</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Blocks</th>
<th>Delete</th>
<th>Edit</th>
</tr>
</thead>
</table>

**REPORTS**

<table>
<thead>
<tr>
<th>Refresh Statistics</th>
<th>Refresh Lifetime Statistics</th>
<th>Refresh Statistics for the Last Day</th>
</tr>
</thead>
</table>
### Actions by Grid (cont.)

<table>
<thead>
<tr>
<th>MENU</th>
<th>LIST</th>
<th>ACTIONS</th>
</tr>
</thead>
</table>

#### STORES

<table>
<thead>
<tr>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Status</td>
</tr>
</tbody>
</table>

#### SYSTEM

<table>
<thead>
<tr>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cache Management</td>
</tr>
<tr>
<td>Enable</td>
</tr>
<tr>
<td>Disable</td>
</tr>
<tr>
<td>Refresh</td>
</tr>
<tr>
<td>Backups</td>
</tr>
<tr>
<td>Delete</td>
</tr>
<tr>
<td>Index Management</td>
</tr>
<tr>
<td>Update on Save</td>
</tr>
<tr>
<td>Update by Schedule</td>
</tr>
</tbody>
</table>

#### Other Settings

<table>
<thead>
<tr>
<th>Notifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark as Read</td>
</tr>
<tr>
<td>Remove</td>
</tr>
</tbody>
</table>
Admin Session Lifetime

As a security measure, the Admin is initially set to time out after 900 seconds, or fifteen minutes of keyboard inactivity. However, you can adjust the lifetime of the session to fit your work style.

**To set the session lifetime:**

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand the **Security** section.
4. In the **Admin Session Lifetime (seconds)** field, enter the number of seconds that a session remains active before it times out.

5. When complete, tap **Save Config**.
CHAPTER 7:

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.

General Configuration
Store Information

The Store Information section provides the basic information that appears on sales documents and in other communications.
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. To learn more, see: VAT ID Validation.

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.

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.

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.
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.

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: [name]  Owner
      Sender Email: [email]  [use system value]

   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.

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. A standard Magento installation displays the default Contact Us form. After submitting the form, a thank you message appears.

It is important to understand that the default Contact Us form is rendered directly from code rather than from a CMS page.

**Default Contact Us Page**

The store footer includes a link to the Contact Us page that is available throughout the store.

**Contact Us Link in Footer**

The Luma sample data includes additional information on the Contact Us page that shows how you might customize the page for your store.
Contact Us

We love hearing from you, our Luma customers. Please contact us about anything at all. You 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.

Phone
1-800-403-8838

Call the Luma Reggie for questions, product questions, or anything else. We're here for you 24 hours a day - 365 days a year.

Press Inquiries
Please direct all media inquiries via email to: pr@luma.com

Apparel Design Inquiries
Are you an independent clothing designer? Feature your products on the Luma website!

Please direct all inquiries via email to: cd@luma.com

Submit
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.”

4. Expand the Email Options section. Then, do the following:
   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 compete, tap Save Config.

To customize the content:

Method 1: Using Sample Data

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.
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.

4. When complete, tap Save Block.
Method 2: Without Sample Data

1. To create a CMS page for the Contact Us form, do the following:
   a. Follow the standard instructions to create a new page, with the following settings:
      - Page Title: Contact Us
      - Content Heading: Contact Us
   b. Under Search Engine Optimization, enter the following settings:
      - URL Key: contact
      - Meta Title: Contact Us
   c. Under Design, set Layout to “1 column.”

2. Under Content, do the following:
   a. Add any information that you want to include. The content that you enter will appear to the left of the form.
   a. If you want to align your content with the top of the form, enclose it in a <div> tag that floats left as shown in the following example:

   **Example**
   ```html
   <div style="float: left; padding-right: 15px;">
   <p>We'd love to hear from you!</p>
   <img src="{{media url='wysiwyg/home/home-erin.jpg'}}" alt="" />
   </div>
   ```

   b. Tap Show / Hide Editor to remove the toolbar. Then, paste the following code on a line below the content that you entered in the last step.

   ```html
   "Contact Us"
   ```
   ```php
   {{block class="Magento\Contact\Block\ContactForm"
   name="contactForm" template="Magento_Contact::form.phtml"}}
   ```

3. When complete, tap Save Page.
   Your custom form now appears instead of the default form whenever the Contact Us link in the footer is clicked. Make sure to test your content on a mobile device to ensure that it renders correctly.
CHAPTER 7: Store Details

Contact Us Custom Page
CHAPTER 8:

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.
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, or JPG (JPEG) file type, and uploaded from the Admin of your store.

Logo in Header

The logo image resides in the following location on the server. Any image file with the name “logo.gif” is used as the default theme logo.

Full path: `app/design/frontend/[vendor]/[theme]/web/images/logo.gif`
Relative path: `images/logo.gif`

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](image)

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](image)

   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

<table>
<thead>
<tr>
<th>FILE FORMAT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PNG</td>
<td>(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.</td>
</tr>
<tr>
<td>GIF</td>
<td>(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.</td>
</tr>
<tr>
<td>JPG (JPEG)</td>
<td>(Joint Photographic 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.</td>
</tr>
</tbody>
</table>
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, APNG, GIF, and JPG (JPEG) 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 exiting image to the format.

![Favicon in Address Bar](image)

**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:
Adding a Favicon

CHAPTER 8: Storefront Branding

**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.
### Favicon File Formats

<table>
<thead>
<tr>
<th>FILE FORMAT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PNG</td>
<td>(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.</td>
</tr>
<tr>
<td>APNG</td>
<td>(Animated Portable Network Graphics) A file format similar to PNG that supports simple animation.</td>
</tr>
<tr>
<td>GIF</td>
<td>(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.</td>
</tr>
<tr>
<td>JPG (JPEG)</td>
<td>(Joint Photographic 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.</td>
</tr>
</tbody>
</table>
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.

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:

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

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

**Long Format Example**

```markdown
Copyright &Copy; 2013-2017 Magento, Inc. All rights reserved.
```

**Short Format Example**

```markdown
&Copy; 2017 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.

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.
5. When complete, tap **Save Configuration**.
CHAPTER 9:
Website, 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 store view, which 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

<table>
<thead>
<tr>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>System-wide settings and resources that are available throughout the Magento installation.</td>
</tr>
<tr>
<td>Website</td>
<td>Settings and resources that are limited to the current website. Each website has a default store.</td>
</tr>
<tr>
<td>Store</td>
<td>Settings and resources that are limited to the current store. Each store has a default root category (main menu) and default store view.</td>
</tr>
<tr>
<td>Store View</td>
<td>Setting and resources that are limited to the current store view.</td>
</tr>
</tbody>
</table>
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 the current scope setting 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 to 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.

To set the configuration scope:

Before making a configuration setting that applies only to a specific website, store, or store 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

<table>
<thead>
<tr>
<th>LEVEL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Config</td>
<td>The default system configuration.</td>
</tr>
<tr>
<td>Main Website</td>
<td>The name of the website at the top of the hierarchy.</td>
</tr>
<tr>
<td>Main Website Store</td>
<td>The name of the default store that is associated with the parent website.</td>
</tr>
<tr>
<td>Default Store View</td>
<td>The name of the default store view that is associated with the parent store.</td>
</tr>
<tr>
<td>Stores Configuration</td>
<td>Jumps to the Stores grid, and is the same as choosing Stores &gt; All Stores from the Admin sidebar.</td>
</tr>
</tbody>
</table>

### Default Value Options

<table>
<thead>
<tr>
<th>CHECKBOX</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use system value</td>
<td>The “Use system value” checkbox appears when the configuration scope is set to “Default Config.”</td>
</tr>
<tr>
<td>Use Default</td>
<td>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.</td>
</tr>
<tr>
<td>Use Website</td>
<td>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.</td>
</tr>
</tbody>
</table>
Catalog Scope

Magento uses the term “catalog” to refer to the product database as a whole. Access to 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.

In sales, the term “catalog” usually refers to a curated 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](image)
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.

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.

You can only edit or assign products for the site you have permissions for, not for all sites where the product is assigned.

Although the Spanish store view is selected in the following example, 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.

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.

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**.
   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 to the global level, the same price is used throughout the store hierarchy. If applied to the website level, the same product can be available at different prices from stores that are associated with different websites. By default, the scope of product 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. The stores and store views that are associated with each website reflect the product pricing that is set at the website level.

For B2B, see also: Configuring Catalog 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.

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.

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

<table>
<thead>
<tr>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GLOBAL</strong></td>
<td></td>
</tr>
<tr>
<td>Admin</td>
<td>All websites, stores, and store views in the installation are managed from the same Admin.</td>
</tr>
<tr>
<td>Default Config</td>
<td>The global default configuration settings are used through the store hierarchy, unless they are overridden at a lower level.</td>
</tr>
<tr>
<td>Catalog</td>
<td>The term “catalog” refers to the product database as a whole, and is available throughout the installation.</td>
</tr>
<tr>
<td>Product Prices</td>
<td>Product prices can be configured to be applied at either a global or website level.</td>
</tr>
<tr>
<td>Product Configurations</td>
<td>Attributes that are used as configurable product options must have a global scope.</td>
</tr>
<tr>
<td>Customers</td>
<td>Customer accounts can be configured to be applied at a global or website level. Each website can have a separate set of customer accounts, or share the same customer accounts with other websites in the installation.</td>
</tr>
<tr>
<td><strong>WEBSITE</strong></td>
<td></td>
</tr>
<tr>
<td>Domain</td>
<td>Additional websites can be set up as subdomains of the primary domain, or have separate IP addresses and dedicated domains.</td>
</tr>
<tr>
<td>Customers</td>
<td>Customer accounts can be configured to be applied at a global or website level. Each website can have a separate set of customer accounts, or share the same customer accounts with other websites in the installation.</td>
</tr>
<tr>
<td>Currency</td>
<td>Each website can be assigned a different base currency. 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.</td>
</tr>
<tr>
<td>Products</td>
<td>Individual products are assigned to the hierarchy at the website level. The Products grid lists all products in the catalog, and the websites where they are available. The Product in Websites setting identifies each website where the product is available.</td>
</tr>
</tbody>
</table>
### SCOPE

<table>
<thead>
<tr>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Prices</td>
<td><strong>Product prices</strong> can be configured to be applied at either a global or website level.</td>
</tr>
<tr>
<td>Payment Methods</td>
<td><strong>Payment methods</strong> are configured at the website level, although the title and instructions can be configured for each store view.</td>
</tr>
<tr>
<td>Checkout</td>
<td>The <strong>checkout process</strong> takes place at the website level, although some display options can be configured for each store view. All stores associated with a website have the same checkout configuration.</td>
</tr>
</tbody>
</table>

### STORE

<table>
<thead>
<tr>
<th>STORE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Root Category</td>
<td>Each store can have a separate set of products and main menu that is based on a “root” category and subcategories. Each catalog has a root category that is assigned at the store level.</td>
</tr>
</tbody>
</table>

### STORE VIEW

<table>
<thead>
<tr>
<th>STORE VIEW</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Subcategories</td>
<td>The <strong>subcategories</strong> that make up the main menu (under the root) are assigned at the store view level.</td>
</tr>
<tr>
<td>Locale</td>
<td>Each store view can be assigned a different locale. The display currency, units of measurement, and most of the Admin interface are specific to the locale.</td>
</tr>
<tr>
<td>Languages</td>
<td>To support multiple languages, all content, including product descriptions, must be translated for each store view.</td>
</tr>
<tr>
<td>Display Currency</td>
<td>A different <strong>display currency</strong> can be used for each store view, although the transactions are processed at the website level using the base currency.</td>
</tr>
</tbody>
</table>
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.

![Diagram of 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.”
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]

   **System Message**

   b. Mark the **Page Cache** checkbox.
   c. With **Actions** set to “Refresh,” tap **Submit**.
CHAPTER 10:
Industry Compliance

Magento for B2B 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.
Payment Services Directive

As of September 14, 2019, the European Union requires that all merchants in the EU and UK comply with the Strong Customer Authentication (SCA) requirements of the Payment Services Directive (PSD2). Merchants in all other countries are encouraged to comply with PSD2 as a best practice.

As a key component of PSD2, Strong Customer Authentication requires two of the following:

- Something only the customer has (password or PIN)
- Something only the customer knows (unique security token generated by phone or key fob.)
- Something only the customer is (biometric authentication such as a fingerprint or facial recognition)

European banks might decline payments that do not meet the requirements. However, low risk and low value transactions might still be accepted, as well as subsequent payments in a recurring subscription.

Due to this significant change and to ensure that customer payments are not declined, we are introducing the following changes and recommendations for native Magento payment integrations.

PSD2 Compliance Guide

<table>
<thead>
<tr>
<th>PAYMENT METHOD</th>
<th>COMPLIANCE REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PayPal</td>
<td>For most PayPal solutions, no action is needed to comply with PSD2 because the requirements are handled by PayPal. For information about specific PayPal solutions, see the note at the top of each PayPal topic.</td>
</tr>
<tr>
<td>Braintree</td>
<td>To comply with PSD2, do one of the following:</td>
</tr>
<tr>
<td></td>
<td>(Recommended) Install and configure the official Braintree payment integration extension from Magento Marketplace.</td>
</tr>
<tr>
<td></td>
<td>Enable and configure the Braintree payment method in the Magento configuration. Both of these integrations support 3D Secure 2.0 verification. However, Braintree implementations that run on JavaScript SDK v2 do not support 3D Secure 2.0.</td>
</tr>
<tr>
<td>Authorize.Net</td>
<td>To comply with PSD2, do one of the following:</td>
</tr>
<tr>
<td></td>
<td>(Recommended) Install the official Authorize.Net payment integration extension from Magento Marketplace.</td>
</tr>
<tr>
<td></td>
<td>Enable and configure the Authorize.Net payment method in the Magento configuration.</td>
</tr>
</tbody>
</table>
### PSD2 Compliance Guide (cont.)

<table>
<thead>
<tr>
<th>PAYMENT METHOD</th>
<th>COMPLIANCE REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both of these integrations support 3D Secure 2.0 verification through <strong>CardinalCommerce</strong> and other third-party services.</td>
<td></td>
</tr>
<tr>
<td><strong>CyberSource</strong></td>
<td>To comply with PSD2, install and configure the official CyberSource payment integration extension from <strong>Magento Marketplace</strong>. 3D Secure 2.0 verification is available through <strong>CardinalCommerce</strong>.</td>
</tr>
<tr>
<td><strong>eWAY</strong></td>
<td>To comply with PSD2, install and configure the official eWAY payment integration extension from <strong>Magento Marketplace</strong>.</td>
</tr>
<tr>
<td><strong>Worldpay</strong></td>
<td>Ask your payment provider what solution they recommend to comply with PSD2 requirements.</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>For all other payment integrations, check the available extensions on <strong>Magento Marketplace</strong>. If you need help, ask your payment provider which solution(s) they recommend to comply with PSD2 requirements.</td>
</tr>
</tbody>
</table>
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 2.2 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:

   ```javascript
   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:

   ```javascript
   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,

   ```javascript
   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.

```javascript
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.
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 to obtain customer consent.

If you have modified the default Google settings to comply with the General Data Protection Regulation, it is no longer necessary to obtain user consent for the use of Google Analytics cookies.

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.”
**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](image)

   - **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: Customer Session Lifetime.

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.

Accessibility
Some visitors to your site rely on keyboard controls for navigation — rather than a mouse — while others might use touch or voice commands. Although keyboard navigation controls vary by browser and platform, the Tab key is commonly used to move the focus through the fields, links, and buttons on a page. To learn more, see Keyboard Shortcuts.

Keyboard Navigation

<table>
<thead>
<tr>
<th>ENVIRONMENT</th>
<th>COMMAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td></td>
</tr>
<tr>
<td>Next Page</td>
<td>Alt + Right</td>
</tr>
<tr>
<td>Previous Page</td>
<td>Alt + Left</td>
</tr>
<tr>
<td>Next Field</td>
<td>Tab</td>
</tr>
<tr>
<td>Previous Field</td>
<td>Shift + Tab</td>
</tr>
</tbody>
</table>
### Keyboard Navigation (cont.)

<table>
<thead>
<tr>
<th>ENVIRONMENT</th>
<th>COMMAND</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>macOS</strong></td>
<td></td>
</tr>
<tr>
<td>Next Page</td>
<td>Cmd + Right</td>
</tr>
<tr>
<td>Previous Page</td>
<td>Cmd + Left</td>
</tr>
<tr>
<td>Next Field</td>
<td>Tab</td>
</tr>
<tr>
<td>Previous Field</td>
<td>Shift-Tab</td>
</tr>
<tr>
<td><strong>General</strong></td>
<td></td>
</tr>
<tr>
<td>Button - choose</td>
<td>Enter (Return)</td>
</tr>
<tr>
<td>Link - go to</td>
<td>Enter (Return)</td>
</tr>
<tr>
<td>Options - navigate</td>
<td>Up, Down, Left, Right</td>
</tr>
<tr>
<td>Options - choose</td>
<td>Spacebar</td>
</tr>
<tr>
<td>Slider</td>
<td>Left, Right, Home, End</td>
</tr>
<tr>
<td>Close</td>
<td>Esc</td>
</tr>
<tr>
<td>Scroll Vertically</td>
<td>PgUp, PgDn</td>
</tr>
<tr>
<td>Scroll Horizontally</td>
<td>Left, Right</td>
</tr>
</tbody>
</table>
CHAPTER 11:  
Catalog Menu

The Catalog Menu provides easy access to product creation, category and inventory management tools, as well as shared catalogs for custom pricing.

To display the Catalog menu:
On the Admin sidebar, tap Catalog.
Menu Options

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

**Categories**
Create the category structure that is the foundation of your store’s navigation.

**Shared Catalogs**
Shared catalogs give you the ability to make custom pricing available to different companies.
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. To view the current URL format, go to the storefront and navigate to any product in your catalog. The format of the URL depends on the current configuration settings and the method that is used to find the page.

**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`

**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.


**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**

```
```

**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.

4. When complete, tap Save Config.

5. When prompted, click the Cache Management link in the system message, and refresh the invalid cache.
CHAPTER 12:
Products Grid

All products in the catalog are accessible from the Products page, where you can create new products and edit existing ones. For a multisite installation, each website can offer a different selection of products for sale from the same catalog.

The Products grid lists all products in the catalog, indicates the website(s) where they are available, and if they are currently enabled for sale. For B2B installations with Shared Catalog enabled, the grid includes a column that indicates which products have alternate discount pricing in a shared catalog.

You can browse through the list page by page, or search for specific products. Use the standard controls to sort and filter the list, and apply actions to selected products.
### Workspace Controls

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Product</td>
<td>Initiates the process to create a new simple product. To choose a specific product type, click the down arrow. Options:</td>
</tr>
<tr>
<td></td>
<td>Simple Product</td>
</tr>
<tr>
<td></td>
<td>Configurable Product</td>
</tr>
<tr>
<td></td>
<td>Grouped Product</td>
</tr>
<tr>
<td></td>
<td>Virtual Product</td>
</tr>
<tr>
<td></td>
<td>Bundle Product</td>
</tr>
<tr>
<td></td>
<td>Downloadable Product</td>
</tr>
<tr>
<td></td>
<td>Gift Card</td>
</tr>
<tr>
<td>Actions</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td>Change Status</td>
</tr>
<tr>
<td></td>
<td>Update Attributes</td>
</tr>
<tr>
<td>Filters</td>
<td>Initiates a catalog search based on the current filters.</td>
</tr>
<tr>
<td>[Default] View</td>
<td>Indicates the current grid column layout. If there are saved grid column views, you can choose another.</td>
</tr>
<tr>
<td>Columns</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td></td>
<td>Change Status</td>
</tr>
<tr>
<td></td>
<td>Update Attributes</td>
</tr>
<tr>
<td></td>
<td>Use the Columns control to customize the selection of columns in the grid.</td>
</tr>
<tr>
<td>Actions</td>
<td>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</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the product in edit mode. You can accomplish the same thing by clicking anywhere on the row.</td>
</tr>
</tbody>
</table>
### Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Checkbox)</td>
<td>Selects multiple records to be subject to an action. The checkbox in the first column of each selected record is marked. Options:</td>
</tr>
<tr>
<td></td>
<td>Select All</td>
</tr>
<tr>
<td></td>
<td>Selects all records found that match the current filter settings.</td>
</tr>
<tr>
<td></td>
<td>Select All on This Page</td>
</tr>
<tr>
<td></td>
<td>Selects only the records found on the current page that match the filter settings.</td>
</tr>
<tr>
<td>ID</td>
<td>A unique, sequential number that is assigned when a new product is saved for the first time.</td>
</tr>
<tr>
<td>Thumbnail</td>
<td>Displays a thumbnail of the main product image.</td>
</tr>
<tr>
<td>Name</td>
<td>The product name.</td>
</tr>
<tr>
<td>Type</td>
<td>The product type.</td>
</tr>
<tr>
<td>Attribute Set</td>
<td>The name of the attribute set that is used as a template for the product.</td>
</tr>
<tr>
<td>SKU</td>
<td>The unique Stock Keeping Unit that is assigned to the product.</td>
</tr>
<tr>
<td>Price</td>
<td>The unit price of the product.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The quantity that is currently in stock.</td>
</tr>
<tr>
<td>Visibility</td>
<td>Indicates where the product is visible in the catalog. Options:</td>
</tr>
<tr>
<td></td>
<td>Not Visible Individually</td>
</tr>
<tr>
<td></td>
<td>Catalog</td>
</tr>
<tr>
<td></td>
<td>Search</td>
</tr>
<tr>
<td></td>
<td>Catalog, Search</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current status of the product. Options:</td>
</tr>
<tr>
<td></td>
<td>Enabled</td>
</tr>
<tr>
<td></td>
<td>Disabled</td>
</tr>
<tr>
<td>Websites</td>
<td>Indicates the website(s) where the product is available.</td>
</tr>
<tr>
<td>Action</td>
<td>Opens the product in Edit mode.</td>
</tr>
<tr>
<td>Shared Catalog</td>
<td>Indicates the shared catalogs that contain custom pricing for the product.</td>
</tr>
</tbody>
</table>
CHAPTER 13:
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\(^1\) is sometimes used to refer to products with multiple options, such as a configurable product that is available in various colors and sizes. To learn more about the available options, see Product 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.

After you learn the basics, the most efficient way to add a large number of products to the catalog is to import them from a CSV file.

\(^1\)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.
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.

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="#" alt="Switch" /></td>
<td>Indicates that the product is currently online.</td>
</tr>
<tr>
<td><img src="#" alt="Switch" /></td>
<td>Indicates that the product is currently offline.</td>
</tr>
</tbody>
</table>

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.

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.

<table>
<thead>
<tr>
<th>COMMAND</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
<td>Save the current product, and continue working.</td>
</tr>
<tr>
<td>Save &amp; New</td>
<td>Save and close the current product, and begin a new product, based on the</td>
</tr>
<tr>
<td></td>
<td>same product type and template.</td>
</tr>
<tr>
<td>Save &amp; Duplicate</td>
<td>Save and close the current product, and open a new duplicate copy.</td>
</tr>
<tr>
<td>Save &amp; Close</td>
<td>Save the current product and return to the Inventory workspace.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>Based on product Name.</td>
</tr>
<tr>
<td>Meta Title</td>
<td>Based on product Name.</td>
</tr>
<tr>
<td>Meta Keywords</td>
<td>Based on product Name.</td>
</tr>
<tr>
<td>Meta Description</td>
<td>Based on product Name and Description.</td>
</tr>
</tbody>
</table>

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.
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**

```
{{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.
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 lets 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 product 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 instructions take you through the process of creating a simple product using a product template, required fields, and basic settings. Each required field is marked with a red asterisk (*). When you finish the basics, you can complete the advanced settings and other settings 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: Complete the Product Information
Step 6: Publish the Product
CHAPTER 13: Creating Products

Simple Product

Step 1: Choose the Product Type

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

![Add Simple Product](image)

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](image)
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](image)

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.

![Product Details](image)

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
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.

**Method 2: Save and Close**

On the Save (▼) menu, choose 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.

The following instructions take you through the process of creating a configurable product using a product template, required fields, and basic settings. Each required field is marked with a red asterisk (*). When you finish the basics, you can complete the advanced settings and other settings as needed.
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.

Before you begin, prepare an attribute set that includes an attribute that is set to one of the allowable input types for each product variation. For example, the attribute set might include dropdown attributes for color and size.

The properties of each attribute that is used for a configurable product variation must have the following settings:

**Product Variation Attribute Requirements**

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td>Global</td>
</tr>
<tr>
<td>Catalog Input Type for Store Owner</td>
<td>The input type of any attribute that is used for a product variation must be one of the following: Dropdown, Visual Swatch, Text Swatch</td>
</tr>
<tr>
<td>Values Required</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Process Overview:**

**Part I: Create Configurable Product**

**Step 1: Choose the Product Type**

1. On the Admin sidebar, tap **Products**. Then, choose **Catalog**.

2. In the upper-right corner on the **Add Product ()** menu, choose **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 that is used in the following example has drop-down attributes for color and size. The name of 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 to a Product.
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 **Enable Product** to the “No” (Disabled) 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](image)

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.

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.

**Process Overview: Part II: Add Configurations**

1. **Step 1: Choose the Attributes**
2. **Step 2: Enter the Attribute Values**
3. **Step 3: Configure the Images, Price, and Quantity**
4. **Step 4: Generate the Product Configurations**
5. **Step 5: Add a Product Image**
6. **Step 6: Complete the Product Information**
7. **Step 7: Publish the Product**
8. **Step 8:Configure the Cart Thumbnails (Optional)**

**Step 1: Choose the Attributes**

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

2. Mark the checkbox of each attribute that you want to include as a configuration. For this example, we choose color and size.

3. The list includes all attributes from the attribute set that can be used in a configurable product.
Select Attributes

4. 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.

5. 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.

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.

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 (-trashcan-) icon.
Configure the Prices

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

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

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.
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**.

![Same Quantity for All SKUs](image)

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

![Different Quantities per Attribute](image)

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**.
Summary

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

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 Enable Product to the “Yes” (✓) position.

2. Do one of the following:

   **Method 1: Save and Preview**
   (This is the Drop-down text)
   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](image)

   **Method 2: Save and Close**
   On the Save (✓) menu, choose Save & Close.

   ![Save & Close](image)

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.
4. When complete, tap Save Config.

THINGS TO REMEMBER

☑ A configurable product allows the shopper to choose options from drop-down, multiple select, visual swatch and text 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 consists 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. Presenting a grouped product can create an incentive for customers to purchase additional items. A grouped product provides an easy way to offer variations of a product, and list them all on the same page.

For example, you might sell open stock flatware, and list every type of utensil that is used in a formal place setting. Some might order multiple salad forks, fish forks, dinner forks, dinner knives, fish knives, butter knives, soup spoons, and dessert spoons. Other customers might order a simple fork, knife, and spoon. Customers can order as many of each item as they want.

Although they are presented as a group, each product in the group is purchased as a separate item. In the shopping cart, each item and the quantity purchased appears as a separate line item.

The following instructions take you through the process of creating a grouped product using a product template, required fields, and basic settings. Each required field is marked with a red asterisk (*). When you finish the basics, you can complete the advanced settings and other settings 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 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, choose Catalog.
2. In the upper-right corner on the Add Product menu, choose Grouped 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.
Step 5: Add Products to the Group

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

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.

4. Tap **Add Selected Products** to add them to the group.

   The selected products appear in the Grouped Products section.

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.

Method 2: Save and Close

On the Save ( ■ ) menu, choose 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.

THINGS TO REMEMBER

- A grouped product is essentially a collection of simple associated products.
- 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 — or digital goods — represent non-tangible items such as memberships, services, warranties, or subscriptions and digital downloads of books, music, videos, or other products. 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. The following instructions take you through the process of creating a virtual product using a product template, required fields, and basic settings. When you finish the basics, you can complete the advanced settings and other settings as needed.

PayPal has deprecated support for the sale of digital goods through PayPal Express Checkout, and recommends that you use either PayPal Payments Standard or any other PayPal payment gateway to process any order that includes virtual products.

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, 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](image)

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](image)
Method 2: Save and Close

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

![Save & Close](image)

**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
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.

If Instant Purchase is available, the Instant Purchase button appears below the Add to Cart button for each item in the bundle.

Customize Bundle

The following instructions take you through the process of creating a bundle product using a product template, required fields, and basic settings. Each required field is marked with a red asterisk (*). When you finish the basics, you can complete the advanced settings and other settings 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, choose **Catalog**.
2. In the upper-right corner on the **Add Product** menu, choose **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.
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” (false) position.

   ![Dynamic SKU and Price](image)

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” (false) 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” (false) 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](image)
**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.

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

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.

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.

3. Repeat these steps for each item you want to add to the bundle.

4. To remove any item from the bundle, tap the **Delete** (Trash) icon.

5. 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.

**Method 2: Save and Close**

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

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drop-down</td>
<td>Displays a drop-down list of options with the product name and price. Only one item can be selected.</td>
</tr>
</tbody>
</table>

![Drop-down example](image)

<table>
<thead>
<tr>
<th>Radio Buttons</th>
<th>Displays a radio button for each option, followed by the product name and price. Only one item can be selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Radio Buttons example" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Checkbox</th>
<th>Displays a checkbox for each option, followed by the product name and price. Multiple items can be selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Checkbox example" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Multiple Select</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Multiple Select example" /></td>
</tr>
</tbody>
</table>
**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.</td>
</tr>
<tr>
<td>Weight</td>
<td>Specifies the weight is calculated based on the items selected, or is a fixed weight for the entire bundle. Options include: Fixed / Dynamic.</td>
</tr>
<tr>
<td>Price View</td>
<td>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.</td>
</tr>
<tr>
<td>Ship Bundle Items</td>
<td>Specifies if individual items can be shipped separately.</td>
</tr>
</tbody>
</table>

**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 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 using a product template, required fields, and basic settings. Each required field is marked with a red asterisk (*). When you finish the basics, you can complete the advanced settings and other settings 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, 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.
WASHINGTON, D.C.

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.
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**.
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 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 Dowloadable 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.

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**.

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 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**.
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]

   **Downloadable Product Options**

   a. 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
   
   b. 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.
   
   c. 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.
   
   d. In the Default Sample Title field, enter the heading that you want to appear above the selection of samples.
In the **Default Link Title** field, enter the default text that you want to use for download links.

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.

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.

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.”

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.

**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.

![Gift Card Detail in Cart](image)

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!
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.

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.

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.

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.

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.

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 using a product template, required fields, and basic settings. Each required field is marked with a red asterisk (*). When you finish the basics, you can 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, 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.

---

**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.

---

**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](image)

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 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:

   **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,

   ![Customer View](image)

   **Customer View**

   **Method 2: Save and Close**

   On the **Save** (✓) menu, choose **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**

**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.
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:
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.

![Gift Card Information](image)
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.

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.

Step 3: Establish the Gift Card Code Pool

6. Expand ☑ the Gift Card Account General Settings section. Then, do the following:
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 14:
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.
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
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 ❗.

General Settings

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td>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 editor toolbar.</td>
</tr>
<tr>
<td>Product Reviews</td>
<td>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.</td>
</tr>
<tr>
<td>Images and Videos</td>
<td>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.”</td>
</tr>
</tbody>
</table>
### 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 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

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configurations</td>
<td>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.</td>
</tr>
<tr>
<td>Customizable Options</td>
<td>Customizable options are based on variations of a single SKU, and can be a good solution if your inventory needs are simple.</td>
</tr>
<tr>
<td>Downloadable Information</td>
<td>The Downloadable Information section is used to generate the links to downloadable products and samples.</td>
</tr>
<tr>
<td>Grouped Products</td>
<td>The Grouped Products section is used to add items to a Grouped product type, and also to edit the current selection of items.</td>
</tr>
<tr>
<td>Bundle Items</td>
<td>The Bundle Items section is used to add items to a Bundle product type, and also to edit the current selection of items.</td>
</tr>
</tbody>
</table>
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.

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 (e.g. shirt color). You need to create a simple product for each configuration (e.g. a product for each color).

Configurations Section

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.
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: Catalog Images and Video.

**To upload an image:**

1. Open the product in edit mode.

2. Scroll down and expand the Images and Videos section.

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.

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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL Key</td>
<td>Store View</td>
<td>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, &quot;search engine friendly&quot; URL, that is based on the product name. 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.</td>
</tr>
<tr>
<td>Meta Title</td>
<td>Store View</td>
<td>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 (SERP&lt;sup&gt;1&lt;/sup&gt;). The meta title should be unique to the page, and less than 70 characters in length. Auto-generated value: {{name}}</td>
</tr>
<tr>
<td>Meta Keywords</td>
<td>Store View</td>
<td>Relevant keywords for the product. Consider using keywords that customers might use to find the product. Auto-generated value: {{name}}</td>
</tr>
<tr>
<td>Meta Description</td>
<td>Store View</td>
<td>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. Auto-generated value: {{name}} {{description}}</td>
</tr>
</tbody>
</table>

---

<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

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.
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.

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.

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).”

**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**.
Product View Optimization

After using Google Content Experiments to set up a series of A/B tests, use the Product View Optimization section to paste the snippet of code from Google into the original product that is to be tested.

This section appears only if Google Content Experiments is enabled in the Google Analytics Google API configuration.
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.

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.

4. Tap Add New Row. Then, complete the following:
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.

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](image)

   *Customizable Options*

   Customizable options let customers choose the product variations they want.

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**

<table>
<thead>
<tr>
<th>INPUT TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEXT</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>A single line input field for text.</td>
</tr>
<tr>
<td>Area</td>
<td>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.</td>
</tr>
<tr>
<td>FILE</td>
<td></td>
</tr>
<tr>
<td>File</td>
<td>A file to be uploaded by the customer.</td>
</tr>
<tr>
<td>SELECT</td>
<td></td>
</tr>
<tr>
<td>Drop-down</td>
<td>A drop-down list of options. Only one item can be selected at a time.</td>
</tr>
<tr>
<td>RadioButtons</td>
<td>A set of options that allows only one to be selected at a time.</td>
</tr>
</tbody>
</table>
### Input Controls (cont.)

<table>
<thead>
<tr>
<th>INPUT TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkbox</td>
<td>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.</td>
</tr>
<tr>
<td>Multiple Select</td>
<td>A drop-down list of options that accepts multiple selections. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.</td>
</tr>
</tbody>
</table>

### DATE

<table>
<thead>
<tr>
<th>INPUT TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>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 Date &amp; Time Custom Options configuration.</td>
</tr>
<tr>
<td>Date &amp; Time</td>
<td>An input field for date and time values.</td>
</tr>
<tr>
<td>Time</td>
<td>An input field for a time value.</td>
</tr>
</tbody>
</table>
Product in Websites

The Product in Websites section identifies each website where the product is available, according to the store hierarchy.

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.
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.
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.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Theme</td>
<td>Store View</td>
<td>Gives you the ability to apply a different theme to the product. Options: (All available themes)</td>
</tr>
<tr>
<td>Layout</td>
<td>Store View</td>
<td>Gives you the ability to apply a different layout to the product page. Options:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No layout updates: This option is preselected by default and does not apply layout changes.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Empty: This option lets you define your own layout, such as a 4-column page. Requires an understanding of XML.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1 column: Applies the 1-column layout.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 columns with left bar: Applies the 2 column layout.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 columns with right bar: Applies the 2-columns with right bar layout.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 columns: Applies the 3 column layout.</td>
</tr>
<tr>
<td>Display product options in</td>
<td>Store View</td>
<td>Options: Product Info Column / Block after Info Column</td>
</tr>
<tr>
<td>Layout Update XML</td>
<td>Store View</td>
<td>Add XML code to customize the theme.</td>
</tr>
</tbody>
</table>
Autosettings

The Autosettings section includes any attributes that are dependencies for other operations. You can apply the default RMA configuration setting to the product, or override it, as needed.
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.

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 Save.

Product In Shared Catalogs

The Product In Shared Catalog section lists each shared catalog where the product is currently available. To learn more, see: Adding Products to a Shared Catalog.
Downloadable Information

The Downloadable Information section is used to generate the links to downloadable products and samples. To learn more, see: Downloadable Product.

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.
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.

Gift Card Information

The Gift Card Information section can be used to override the configuration settings that determine how the card is managed.
CHAPTER 15: Managing Price

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
- Custom Pricing
Advanced Pricing

The Advanced Pricing settings define the conditions required for special pricing that is available for a specific customer group or shared catalog. Advanced Pricing can be applied to simple, virtual, downloadable, and bundle products. To apply discounted pricing to other product types, use a catalog price rule. To learn more, see: Price Scope.

Advanced pricing data is synchronized with product pages and shared catalogs. For example, if you update a tier price quantity, the system updates the value in the shared catalog and on the product page. Any custom pricing that is indicated in the shared catalog has priority over customer group pricing.

To display the Advanced Pricing options:

1. Open the product in edit mode.
2. Under the Price field, click Advanced Pricing.
3. Follow the instructions for the type of advanced pricing that is needed.
   - Group Price
   - Special Price
   - Tier Price
   - Minimum Advertised Price
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Price</td>
<td>Offers a discounted price during a scheduled campaign. When a special price is available, the retail price is crossed out and the special price appears below in large, bold text.</td>
</tr>
<tr>
<td>Cost</td>
<td>The actual cost of the item.</td>
</tr>
<tr>
<td>Customer Group Price, Catalog and Tier Price</td>
<td>Sets up promotional and tier prices for specific shared catalogs and customer groups for the current website. Options include:</td>
</tr>
<tr>
<td>Website</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>Group or Catalog</td>
<td>(Required) Identifies the customer group or shared catalog that qualifies to receive the discount price. When a value in a group or catalog field is changed, the corresponding custom price row that matched the previous setting is deleted from the shared catalog. Options:</td>
</tr>
<tr>
<td>ALL GROUPS</td>
<td>Applies the rule to all customer groups. The value is not applied to the shared catalog, and changes in advanced pricing data are not synchronized with the shared catalog.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOT LOGGED IN</td>
<td>Applies the rule guests and customers who are not logged in to their accounts.</td>
</tr>
<tr>
<td>Shared Catalogs</td>
<td>Applies the rule to a specific shared catalog.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Specifies the quantity that is required to receive a tier price.</td>
</tr>
<tr>
<td>Price</td>
<td>(Required) Specifies a fixed or discount product price for members of the customer group, within the specific website. Options: Fixed / Discount</td>
</tr>
<tr>
<td>Fixed</td>
<td>(Default) The discount price is entered as a fixed decimal value. For example, enter “9.99” as the discount price.</td>
</tr>
<tr>
<td>Discount</td>
<td>The discount price is entered as a percentage (%) of the base product price. For example, enter “10” for a 10% discount.</td>
</tr>
<tr>
<td>Deletes</td>
<td>Deletes the current rule.</td>
</tr>
<tr>
<td>Add</td>
<td>Inserts an additional row for a new rule</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manufacturer's Suggested Retail Price</th>
<th>The manufacturer's suggested retail price (MSRP) for the product.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Actual Price</td>
<td>Determines where the actual price of the product is visible to the customer. Options: Use Config  Uses the current configuration setting for the price display.</td>
</tr>
</tbody>
</table>

---

Advanced Pricing

CHAPTER 15: Managing Price
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Gesture</td>
<td>Displays the actual product price in a popup, in response to the “Click for price” or What’s this?” link.</td>
</tr>
<tr>
<td>In Cart</td>
<td>Displays the actual product price in the shopping cart.</td>
</tr>
<tr>
<td>Before Order Confirmation</td>
<td>Displays the actual product price at the end of the checkout process, just before the order is submitted.</td>
</tr>
</tbody>
</table>
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 customer group prices have a quantity of 1.

To set up a group price:

1. Open the product in edit mode. Then below the Price field, click Advanced Pricing.
2. In the Customer Group Price section, tap Add. Then, do the following:
a. For a multisite installation, choose the **Website** where the group price applies.

b. Choose the **Customer Group** that is to receive the discount.

c. Enter a **Quantity** of 1.

d. Under **Price**, do one of the following:
   - Choose **Fixed**. Then, enter the discounted product price.
   - Choose **Discount**. Then, enter the discounted price as a percentage of the product price.

The following example extends a 10% discount to members of the General customer group who are logged in to their customer accounts.

3. To add another group price, tap **Add**, and repeat these steps.

4. When complete, tap **Done**. Then, tap **Save**.

---

**Group Price in Shopping Cart**
Special Price

A special price can be offered for a designated period of time as a Scheduled Update. During the specified time period, the special price appears instead of the regular price, followed by a notation that shows the regular price.

Special Price on Product Page

To assign a special price to multiple products, such as multiple variations of a configurable product, use the Actions control+ as described in Method 2.

Method 1: Apply Special Price to an Individual Product

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.
d. Scroll down to the **Price** field, and click **Advanced Pricing**. Then, enter the amount of the **Special Price**.

3. When complete, tap **Done**. Then, tap **Save**.

In the storefront, the Special price should appear in both catalog listing, and on the product page.

The Scheduled Change appears at the top of the page.

**Scheduled Change**

**Method 2: Apply Special Price to Multiple Products**

The following example shows how to assign the same special price to multiple product variations of a configurable product.
1. On the Admin sidebar, tap **Catalog.** Then, choose **Products.**

2. Tap **Filters.** Then, do the following:
   a. Enter the **Name** of the configurable product.
   b. Set **Type** to “Simple Product.”

   ![Filters](image)

   **Filters**

   c. Tap **Apply Filters.**

   The grid lists all simple products that are associated as variations of the configurable product.

   ![Product Variations](image)

   **Product Variations**

3. If you want to assign the same special price to all of the products, set the control in the header of the first column to “Select All.” Otherwise, mark the checkbox of each product that you want to include.

4. Set the **Actions** control to “Update attributes.”
Update Attributes

5. Scroll down to the **Special Price** field. Then, do the following:

   a. Mark the **Change** checkbox below the **Special Price** field. Then, enter the special price that you want to offer.

   b. Mark the **Change** checkbox below the **Special Price From Date** field. Click the **Calendar** ( ), and choose the first date of the special price promotion.

      The special price goes into effect immediately after midnight at the beginning of the start date (00:01), and continues until just before midnight (23:59) on the day before the end date.

   c. Mark the **Change** checkbox below the **Special Price To Date** field. Click the **Calendar** ( ), and choose the last date of the special price promotion.

Special Price Fields

6. When complete, click **Save**.

A message indicates how many records were updated with the special price.

The special price becomes available in the store on the date specified, and appears in catalog listings as well as on the product page. For a configurable product, the regular price also appears on the product page when the options are chosen.
Troubleshooting

If the special price doesn’t appear correctly in the storefront on both the catalog listing and product pages, do the following:

1. Clear your browser cache.
2. On the Admin sidebar, tap System. Then, choose Cache Management.
3. Tap Flush Magento Cache.
Tier Price

Tier pricing lets you offer a quantity discount from a product listing or product page in the storefront. The discount can be applied to a specific store view, customer group, or shared catalog.

If you have many products to update, it is most efficient to import the tier price changes, rather than enter them individually. To learn more, see: Importing Tier Prices.

The product page calculates the quantity discount and displays a message such as:

Buy 25 for $5.25 each and save 25%

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. If you’re creating a tier of several prices, tap Add for each additional level, so you can work all tiers at the same time. Each tier in the group has the same website and customer group or shared catalog assignment, but a different quantity and price.
4. For each tier, do the following:
a. If your store has multiple websites, choose the **Website** where the tier pricing applies.

b. If necessary, choose the **Customer Group** or **Shared Catalog** that is to receive the discount.

c. In the **Qty** field, enter the quantity that must be ordered to receive the discount.

d. Use one of the following methods to enter the tier prices:

**Method 1: Enter Price as Fixed Amount**

1. Set **Price** to “Fixed”.
2. In the next field, enter the adjusted price for one unit at that tier.

```
+-----------------+-------------------+---------+-------------------+
| Website          | Customer Group    | Quantity| Price              |
| All Websites [USD] | General            | 6       | Fixed, $5.65       |
| All Websites [USD] | General            | 12      | Fixed, $5.60       |
| All Websites [USD] | General            | 24      | Fixed, $5.25       |
+-----------------+-------------------+---------+-------------------+
```

*Tier Price as a Fixed Amount*

**Method 2: Enter Price as Percentage**

1. Set **Price** to “Discount”.
2. In the next field, enter the discounted price as a percentage off the base price of the product. For example, for a 15 percent discount, enter the number 15. (The price is saved with two decimal positions, such as “15.00”.)

```
+-----------------+-------------------+---------+-------------------+
| Website          | Group or Catalog  | Quantity| Price              |
| All Websites [USD] | ABC Catalog       | 25      | Discount, % 25     |
| All Websites [USD] | ABC Catalog       | 30      | Discount, % 35     |
| All Websites [USD] | ABC Catalog       | 75      | Discount, % 40     |
+-----------------+-------------------+---------+-------------------+
```

*Tier Price as a Percentage*

5. To add another set of tier pricing for a different website or customer group, repeat the process.
6. 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 applied, according to the product type and price setting. The actual price is used by order management and customer management tools, and reports.

Using MAP with Product Types

<table>
<thead>
<tr>
<th>PRODUCT TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple, Virtual</td>
<td>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.</td>
</tr>
<tr>
<td>Grouped</td>
<td>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.</td>
</tr>
<tr>
<td>Configurable</td>
<td>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.</td>
</tr>
<tr>
<td>Bundle (with fixed price)</td>
<td>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.</td>
</tr>
</tbody>
</table>

MAP is not available for bundle products with dynamic pricing.

| 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

<table>
<thead>
<tr>
<th>PRICE SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Price</td>
<td>When 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.</td>
</tr>
<tr>
<td>Associated Product Price</td>
<td>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.</td>
</tr>
<tr>
<td>MSRP</td>
<td>If a product in the cart has the Manufacturer’s Suggested Retail Price (MSRP) specified, the price is not crossed-out.</td>
</tr>
<tr>
<td>Tier Price</td>
<td>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. The tier price appears according to the Display Actual Price setting.</td>
</tr>
<tr>
<td>Special Price</td>
<td>If the Special price is specified, the special price is displayed according to the Display Actual Price setting.</td>
</tr>
</tbody>
</table>

### 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.
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.
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:
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:

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**.
Custom Pricing

Custom pricing is available by using a shared catalog, which make it possible to set different product pricing for a specific company or website. To learn more, see Shared Catalogs.
CHAPTER 16: 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.

**Advanced Inventory**

![Advanced Inventory](image)

*Advanced Inventory (Short Form)*
Stock Management Methods

Method 1: Without Stock Management

1. Open the product in Edit mode.
2. Under the Quantity field, click Advanced Inventory.
   
   For any field that you want to edit, clear the Use Config Settings checkbox to make the field available.
3. Set Manage Stock to “No.”
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.

   ![Quantity Increments]

7. When complete, tap Save.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Stock</td>
<td>Global</td>
<td>Determines if inventory control is used to manage this product in your catalog. Options: Yes / No</td>
</tr>
<tr>
<td>Minimum Qty Allowed in Shopping Cart</td>
<td>Global</td>
<td>Determines the minimum number of the product that can be purchased in a single order.</td>
</tr>
<tr>
<td>Maximum Qty Allowed in Shopping Cart</td>
<td>Global</td>
<td>Determines the maximum number of the product that can be purchased in a single order.</td>
</tr>
<tr>
<td>Enable Qty Increments</td>
<td>Global</td>
<td>Determines if the product can be sold in quantity increments. Options: Yes / No</td>
</tr>
<tr>
<td>Qty Increments</td>
<td>Global</td>
<td>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. 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,</td>
</tr>
</tbody>
</table>

### Method 2: With Stock Management

1. Open the product in edit mode.

2. Under the Quantity field, click **Advanced Inventory**.

   For any field that you want to edit, clear the **Use Config Settings** checkbox to make the field available.

3. Set **Manage Stock** to “Yes.” Then, do the following:
   a. Enter the **Qty** currently in stock.
   b. Enter the **Out-of-Stock Threshold**.
   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 shipping in separate boxes, set **Allow Multiple Boxes for Shipping** to “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 Status** to “In Stock.”

9. When complete, tap **Save**.

![Advanced Inventory (Long Form)](image-url)
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Manage Stock                   | Global  | Determines if inventory control is used to manage this product in your catalog. Options:  
Yes: Displays the long form with all stock management options.
No: Display the short form without stock management options. |
| Qty                            | Global  | The quantity of the item that is currently in stock.                        |
| Out-of-Stock Threshold         | 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  | Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options:  
Yes: Permits values to be entered as decimals, rather than whole numbers, which is suitable for products sold by weight, volume or length.
No: Requires quantity values to be entered as whole numbers. |
| Allow Multiple Boxes for Shipping | Global  | Determines if parts of the product can be shipped separately. Options: Yes / No |
| Backorders                     | Global  | 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: |
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Backorders</td>
<td></td>
<td>Does not accept backorders when product is out of stock.</td>
</tr>
<tr>
<td>Allow Qty Below 0</td>
<td></td>
<td>Accepts backorders when the quantity falls below zero.</td>
</tr>
<tr>
<td>Allow Qty Below 0 and Notify Customer</td>
<td></td>
<td>Accepts backorders when the quantity falls below zero, but notifies customers that orders can still be placed.</td>
</tr>
<tr>
<td>Notify for Quantity Below Global</td>
<td></td>
<td>Determines the stock level at which notification is sent that the inventory has fallen below the threshold.</td>
</tr>
<tr>
<td>Enable Qty Increments</td>
<td>Global</td>
<td>Determines if the product can be sold in quantity increments. Options: Yes / No</td>
</tr>
<tr>
<td>Stock Status</td>
<td>Global</td>
<td>Determines the current availability of the product. Options:</td>
</tr>
<tr>
<td>In Stock</td>
<td></td>
<td>Makes the product available for purchase.</td>
</tr>
<tr>
<td>Out of Stock</td>
<td></td>
<td>Unless Backorders are activated, prevents the product from being available for purchase and removes the listing from the catalog.</td>
</tr>
</tbody>
</table>
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.

![Image of Harmony Lumaflex™ Strength Band Kit](image-url)

*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.”

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.”
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.

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.

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.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display product availability in stock in the frontend:</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Product Inventory**

<table>
<thead>
<tr>
<th>Manage Stock</th>
<th>Yes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Stock Availability</th>
<th>In Stock</th>
<th>Out of Stock</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>“Availability: In Stock”</td>
<td>“Availability: Out of Stock”</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display product availability in stock in the frontend:</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Product Inventory**

<table>
<thead>
<tr>
<th>Manage Stock</th>
<th>Stock Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>In Stock: None Out of Stock: None</td>
</tr>
</tbody>
</table>

**Example 2: Hide Availability Message**

**Scenario 1:** This combination of configuration and product settings prevents the availability message from appearing on the product page.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display product availability in stock in the frontend:</td>
<td>No</td>
</tr>
</tbody>
</table>

**Product Inventory**

<table>
<thead>
<tr>
<th>Manage Stock</th>
<th>Stock Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>In Stock: None Out of Stock: None</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display product availability in stock in the frontend:</td>
<td>No</td>
</tr>
<tr>
<td>Product Inventory</td>
<td></td>
</tr>
<tr>
<td>Manage Stock</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Out of Stock Products</td>
<td>Yes</td>
</tr>
<tr>
<td>Display product availability in stock in the frontend</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Out of Stock Products</td>
<td>Yes</td>
</tr>
<tr>
<td>Display product availability in stock in the frontend</td>
<td>No</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Out of Stock Products</td>
<td>Yes</td>
</tr>
<tr>
<td>Display product availability in stock in the frontend</td>
<td>No</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>STOCK OPTIONS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Out of Stock Products</td>
<td>No</td>
</tr>
<tr>
<td>Display product availability in stock in the frontend</td>
<td>None</td>
</tr>
</tbody>
</table>
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](image)

**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.

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.

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 17:
Catalog Images and Video

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 display size of the image container on the page is defined in the style sheet of your theme. However, where the image appears in your store 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 images, 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.
2. To work with a specific store view, set the Store View chooser in the upper-left corner to the applicable view.
3. Scroll down and expand the Images and Videos section. Then, do any of the following:

Upload an Image

To upload an image, do one of the following:

- 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** (삭제) icon in the upper-right corner of the image tile. Then, tap **Save**.

4. Tap the image that you want to open in detail view. Then, do any of the following:

![Image Detail View](image)

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.
Assign Roles

Hide Image
To exclude an image from the thumbnail gallery, mark the **Hidden** checkbox. Then, tap **Save**.

Hidden Images

5. To close detail view, click the **Close** (×) box in the upper-right corner.

6. When complete, tap **Save**.
## Image Roles

<table>
<thead>
<tr>
<th>IMAGE ROLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thumbnail</td>
<td>Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels</td>
</tr>
<tr>
<td>Small Image</td>
<td>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</td>
</tr>
<tr>
<td>Base Image</td>
<td>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. Depending on the level of zoom that you want to achieve, the base image should be two or three times the size of the container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)</td>
</tr>
<tr>
<td>Swatch</td>
<td>A swatch can be used to illustrate the color, pattern, or texture. Example size: 50 x 50 pixels</td>
</tr>
</tbody>
</table>
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**.
4. When complete, click **Save Config**.
5. When prompted, refresh the cache.

---

**Product Video**

```
<table>
<thead>
<tr>
<th>Product Video</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Product Video" /></td>
</tr>
<tr>
<td>YouTube API key</td>
</tr>
</tbody>
</table>
```
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.

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**

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>The URL of the associated video.</td>
</tr>
<tr>
<td>Title</td>
<td>The video title.</td>
</tr>
<tr>
<td>Description</td>
<td>The video description.</td>
</tr>
<tr>
<td>Preview Image</td>
<td>An uploaded image that is used as a preview of the video in your store.</td>
</tr>
</tbody>
</table>

**Get Video Information**

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. For accessibility controls, see Keyboard Navigation.
Image Zoom

Customers can view a magnified portion of the image on mouseover, if the base 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.

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.
Placeholder Images

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.

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.
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 file types 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
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.

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.

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).

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](image)

**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.
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.
Creating Swatches

Swatches can be defined as a component of the color attribute, or set up locally for a specific product and uploaded as 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:
a. In the Swatch column, tap the new swatch to display the menu. Then, select **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.

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.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Red SW11</td>
<td>Red</td>
</tr>
<tr>
<td></td>
<td>Green SW11</td>
<td>Green</td>
</tr>
<tr>
<td></td>
<td>Blue SW11</td>
<td>Blue</td>
</tr>
</tbody>
</table>

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.

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](image)

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](image)

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](image)
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.”

![Update Attributes](image)

4. Scroll down to the Color attribute, and mark the Change checkbox.

![Change](image)

5. Choose the swatch that applies to the selected products, and tap Save. Then when prompted, refresh the cache.

![Swatch in Storefront](image)
CHAPTER 18:
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. The category structure of the catalog is reflected by the main menu — or top navigation — of the store.

Category Tree

### Controls

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Root Category</td>
<td>Creates a new root category.</td>
</tr>
<tr>
<td>Add Subcategory</td>
<td>Adds a subcategory below the current category or subcategory.</td>
</tr>
<tr>
<td>Collapse All / Expand All</td>
<td>Either collapses or expands the category tree.</td>
</tr>
<tr>
<td>Delete</td>
<td>Removes the current category or subcategory from the tree.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves any changes made to the category.</td>
</tr>
</tbody>
</table>
Best Practices for Product Categories

☑ Category Structure
The structure of the categories in the main menu can impact customer experience and performance. As a best practice, it is usually best to identify one over-arching top-level category, and avoid having other categories with the same name. For example, rather than having multiple categories for “Women” organized under different departments, such as Clothing/Women, Shoes/Woman, Hats/Women, it can be more efficient to make the top-level parent category “Women,” and then create subcategories as needed below. Be consistent with the category structure, and use the same approach for all product types in your catalog.

☑ Business Rules and Automation
Consider the category structure and available attribute values when using business logic to show similar items on a catalog page, or to set up a personalized promotion, automated process, or search criteria. For example, if you were to specify “polo” as a parent category, the results might include mixed gender and age-inappropriate products. However, if you were to match a specific subcategory of polo shirts, the results would be more narrow and likely to appeal to a specific customer — especially when combined with other attribute values that target a specific customer.

Consider the number of products that must be filtered through and retrieved when referencing a specific category path. The difference in results can be dramatic. Consider the different results returned by the following category paths:

- [Category: All Products/Shirts/Father’s Day/Polos/Sale]
- [Category Path: Men/Shirts/Polos]
- [Child Category: Polos]

It’s important to clearly define categorical relationships such as parent category, sub category, category path, and any associated keywords and attributes such as availability, sale price, brand, size and color.
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 create as many additional subcategories as needed, according to the maximum menu depth that is set in the configuration. 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.

For a website with multiple stores, you can create a different root category for each store that defines the set of categories that is used for the top navigation.

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: Set Category Permissions
Step 8: 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.

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.
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.
Display Settings
**Step 5:** Complete the Search Engine Optimization Settings

1. Expand 🔄 the **Search Engine Optimization Settings** section.

2. Complete the following meta data for the category:
   - Meta Title
   - Meta Keywords
   - Meta Description

   ![Search Engine Optimization](image)

3. 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.
4. Tap Save and continue.

**Step 7: Set Category Permissions**

1. Expand the **Category Permissions** section. Then, do the following:
   a. For a multisite installation, choose the **Website** where the category permissions apply.
   b. Choose the **Customer Group** or **Shared Catalog** where the category permissions apply.
   c. Set the following permissions as needed:
      - Browsing Category
      - Display Product Prices
      - Add to Cart

2. To add another permission rule, tap **New Permission**. Then repeat the process.
Step 8: Complete the Design Settings

1. Expand the Design section. Then, do the following:

   a. To apply the parent category design settings to this category, set Use Parent Category Settings to the “Yes” position.

   b. To change the design of the category pages, choose the Theme that you want to apply.

   c. To change the column layout of the category pages, choose the Layout that you want to apply.

   d. To enter custom code, enter valid XML code in the Layout Update XML box.

   e. To use the same design for product pages, set Apply Design to Products to the “Yes” position.

2. 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 in the category tree. You can create a root category with an entirely new set of products, or copy products from an existing root category. The root category can be assigned to the current store, or to any other store in the same website.

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.

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**.
Modifying a Category

After a category is established, it can be edited, moved to another position in the category tree, or deleted from the catalog. If your catalog is live, first consider how the change might impact any existing links to products in the category. For example, if your product URLs include the category path, and the category name is changed, any existing links to products in the category will be broken. To avoid this problem, you can configure your catalog to automatically create a permanent redirect if the URL key changes. You can also use the URL Rewrite tool to redirect traffic from an old URL to a new one.

To move a category:

1. On the Admin sidebar, tap Catalog. Then, choose Products.
2. To move a category, drag-and-drop the category to a new position in the tree. Changes to the category structure are saved automatically.

To delete a category:

3. In the category tree, select the category that you want to delete.
   
   A deleted category cannot be restored, so make sure that you have selected the correct category before proceeding.
4. Tap Delete Category. Then when prompted to confirm, tap OK.
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.
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.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category Image</td>
<td>Store View</td>
<td>Uploads an image that appears at the top of the category page. Uploads an image for the category page.</td>
</tr>
<tr>
<td>Description</td>
<td>Store View</td>
<td>Enter a description of the category content. Toggles the editor between WYSIWYG and HTML modes.</td>
</tr>
<tr>
<td>Add CMS Block</td>
<td>Store View</td>
<td>Adds an existing CMS block to the category page.</td>
</tr>
</tbody>
</table>
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. For examples of how categories are reflected in the storefront, see: Catalog Navigation.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Mode</td>
<td>Determines the content elements displayed on the category page. Options: Products Only, Static Block Only, Static Block and Products</td>
</tr>
<tr>
<td>Anchor</td>
<td>When set to “Yes,” includes the “filter by attribute” section in the layered navigation. Options: Yes / No</td>
</tr>
<tr>
<td>Available Product Listing Sort By</td>
<td>(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.</td>
</tr>
<tr>
<td>Default Product Listing Sort By</td>
<td>(Required) To define the default “Sort By” option, clear the “Use Config Settings” checkbox and select an attribute.</td>
</tr>
<tr>
<td>Layered Navigation Price Step</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL Key</td>
<td>Store View</td>
<td>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. 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.</td>
</tr>
<tr>
<td>Meta Title</td>
<td>Store View</td>
<td>The title appears in the title bar and tab of your browser, and is also the title on a search engine results page (SERP&lt;sup&gt;1&lt;/sup&gt;). The meta title should be unique to the page, and less than 70 characters in length.</td>
</tr>
<tr>
<td>Meta Keywords</td>
<td>Store View</td>
<td>Relevant keywords for the category. Consider using keywords that customers might use to find products in the category.</td>
</tr>
<tr>
<td>Meta Description</td>
<td>Store View</td>
<td>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.</td>
</tr>
</tbody>
</table>

<sup>1</sup>Search Engine Results Page
Products in Category

The Products in Category section lists the products that are currently assigned to the category, and allows you to use category rules to dynamically change the product selection when a set of conditions is met. To learn more, see: Visual Merchandiser.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>SKU</th>
<th>Price</th>
<th>Position</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>54</td>
<td>Sprite Yoga Comparison Kit</td>
<td>24-WG085</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Sprite Yoga Strap &amp; Foot</td>
<td>24-WG085</td>
<td>$14.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Sprite Stair Ball 75 cm</td>
<td>24-WG083-blue</td>
<td>$12.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Sprite Stair Ball 75 cm</td>
<td>24-WG083-px</td>
<td>$13.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>Sprite Stair Ball 75 cm</td>
<td>24-WG083-gray</td>
<td>$12.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Sprite Stair Ball 65 cm</td>
<td>24-WG082-blue</td>
<td>$17.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Category Products

To apply a category rule:

1. Set Match products by rule to the “Yes” position.

The automatic sorting and condition options appear.

To Match Products by Rule

Automatic Sort

To apply a sort order automatically to the list, based on current conditions, set Automatic Sorting to one of the following:
Stock level                Move to top or bottom.
Special price             Move to top or bottom.
New Products              List newest products first.
Color                     Sort alphabetically by color.
Name                      Sort in ascending or descending order by Name.
SKU                       Sort in ascending or descending order by SKU
Price                     Sort in ascending or descending order by Price.

**Add Condition**

1. Tap **Add Condition**, then 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.

![Add Condition to Category Rule](image)

2. 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.”

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

When setting up a category rule, the products are matched and assigned to the rule when the category is saved. Therefore, if you add a new product to the catalog and want to include it in the rule, you must re-save each category that is set to match products by rule, to ensure that the new product is included.
Field Definitions

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match products by rule</td>
<td>Determines if the list of products in the category is dynamically generated by a category rule. Options: Yes / No</td>
</tr>
<tr>
<td>Automatic Sorting</td>
<td>Automatically applies a sorting order to the list of category products. Options:</td>
</tr>
<tr>
<td></td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Move low stock to top</td>
</tr>
<tr>
<td></td>
<td>Move low stock to bottom</td>
</tr>
<tr>
<td></td>
<td>Special price to top</td>
</tr>
<tr>
<td></td>
<td>Special price to bottom</td>
</tr>
<tr>
<td></td>
<td>Newest products first</td>
</tr>
<tr>
<td></td>
<td>Sort by color</td>
</tr>
<tr>
<td></td>
<td>Name: A - Z</td>
</tr>
<tr>
<td></td>
<td>Name: Z - A</td>
</tr>
<tr>
<td></td>
<td>SKU: Ascending</td>
</tr>
<tr>
<td></td>
<td>SKU: Descending</td>
</tr>
<tr>
<td></td>
<td>Price: High to Low</td>
</tr>
<tr>
<td></td>
<td>Price: Low to High</td>
</tr>
</tbody>
</table>

Add Condition

Adds an additional condition to the rule.

CONDITIONS

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Determines the attribute that is used as the basis of the condition. Options:</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>
Field Definitions (cont.)

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

Operator

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:
- Equal
- Not equal
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Contains

Value

Specifies the value the attribute must have to meet the condition.

Logic

The Logic column is used to define multiple conditions, and appears only when an additional condition is added. Options:
- OR / AND

Workspace Controls

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>📊</td>
<td>View as List</td>
</tr>
<tr>
<td>📊</td>
<td>View as Tiles</td>
</tr>
<tr>
<td>✅ ✖️</td>
<td>Match by Rule</td>
</tr>
<tr>
<td>🕳️</td>
<td>The drag and drop control allows you to grab a product and move it to another position in the current page of the grid. To learn more, see: Visual Merchandiser.</td>
</tr>
<tr>
<td>🔄</td>
<td>Determines the position of the product in the list.</td>
</tr>
</tbody>
</table>

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 to determine the selection of products, their relative position in the list, and the attributes that are available for category rules. However, only one sort order can be assigned to the store view level of any store.

**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 the Admin sidebar, choose **Catalog**. Then, choose **Categories**.

2. If necessary, choose the **Store View** where the settings apply.
   
   For a multistore installation, the Store View setting applies the sort order to all available views within the store.

3. In the category tree on the left, choose the category that you want to edit.
Step 2: Sort the Products

1. In the **Products in Category** section, tap the tiles (Ⅲ) button, below the Add Products 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.
3. To save the sort order, tap **Save Category**.

4. When prompted, update any invalid indexers.

**Method 2: Automatic Sort**

1. Set **Match products by rule** ( ) to “Yes.”
2. Set **Automatic Sorting** to your preference.

3. Follow the instructions in the next step to create a category rule.

**Step 3: Create a Category Rule**

1. Set **Match products by rule** to “Yes.”

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

Design
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Parent Category Settings</td>
<td>Allows the current category to inherit the design settings from the parent category. Options: Yes / No</td>
</tr>
<tr>
<td>Theme</td>
<td>Applies a custom theme to the category.</td>
</tr>
<tr>
<td>Layout</td>
<td>Applies a different layout to the category page. Options:</td>
</tr>
<tr>
<td>No layout updates</td>
<td>Preselected by default, and does not apply layout changes to the category page.</td>
</tr>
<tr>
<td>Empty</td>
<td>Use to define your own page layout. (Requires an understanding of XML.)</td>
</tr>
<tr>
<td>1 column</td>
<td>Applies a one-column layout to the category page.</td>
</tr>
<tr>
<td>2 columns with left bar</td>
<td>Applies a two-column layout with a left sidebar to the category page.</td>
</tr>
<tr>
<td>2 columns with right bar</td>
<td>Applies a two-column layout with a right sidebar to the category page.</td>
</tr>
<tr>
<td>3 columns</td>
<td>Applies a three-column layout to the category page.</td>
</tr>
<tr>
<td>Layout Update XML</td>
<td>Updates the theme layout with custom XML code.</td>
</tr>
<tr>
<td>Apply Design to Products</td>
<td>When selected, applies the custom settings to all products in the category.</td>
</tr>
</tbody>
</table>
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, ibnly 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.

Step 1: 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:
**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](image)

**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](image)
**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.)

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.

**Step 2: Apply Category Permissions**

1. On the Admin sidebar, tap **Catalog.** choose **Categories**.

2. In the category tree, select the target category.

3. Expand ✪ the **Category Permissions** section. Then do the following:
   a. To create a permissions rule, tap **New Permission**.
a. Choose the applicable **Website** and **Customer Group**.

b. Set the individual permissions as needed.

4. When complete, tap **Save**.
CHAPTER 19:

Product Attributes

Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Product attributes can be organized into attribute sets, which are then used as templates for creating products.

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 and attribute sets as necessary to describe the products in your catalog. In addition to the attributes that you can create, system attributes, such as price, are built into the core Magento platform and cannot be changed.

![Creating a New Attribute While Editing a Product](image)
Best Practices for Product Attributes

Attribute Names
Establish consistent attribute naming conventions, that includes letter case and punctuation. For example, Color:Green and Color:green might be considered as two different attribute values by different systems. Such noise in the data can affect business rules, search results and data filters for applications that match products to rules.

Attribute Use
Consider how attributes are to be used when assigning properties and values. Identify the attributes that are used as labels for presentation, such as a title or product name, image, price, and description, and which attributes are used for data entry. Consider how the attributes are represented on different pages throughout the site, and how they appear on category pages, product detail pages, category grids, and thumbnail sliders.

Color
Ad-hoc color descriptions can pose a challenge from the standpoint of database operations. Color names such as “Azure Skies” or “Robin Egg Blue” have great appeal, but might not return the best results when used as search criteria, or if merchandising requires you to specify Color_Family:Blue. Take into consideration how colors are represented in search results and layered navigation, and establish some guidelines for your business needs. Then, be consistent when assigning color attribute values throughout your catalog.
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.

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.**

   ![](image1.png)

   **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.”

![Manage Options](image2.png)
Step 2: **Describe the Advanced Properties** (if needed)

1. Enter a unique **Attribute Code** in lowercase characters, and without spaces.

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)

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](image)

**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**.

![Storefront Properties](image)

**Attributes for Configurable Products**

Any attribute that is used as a drop-down list of options for a configurable product must have the following properties:

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Input Type for Store Owner</td>
<td>Dropdown</td>
</tr>
<tr>
<td>Scope</td>
<td>Global</td>
</tr>
</tbody>
</table>
Adding an Attribute to a Product

Although attributes are managed primarily 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.

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.
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.

   ![Attribute Properties](image)

   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.
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.

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)

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.
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**.
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.

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**.
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.

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.

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Field</td>
<td>A single line input field for text.</td>
</tr>
<tr>
<td>PROPERTY</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Text Area</td>
<td>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.</td>
</tr>
<tr>
<td>Date</td>
<td>Date values can be entered by making a selection from a drop-down list, or popup calendar (:flex). 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: Date &amp; Time Custom Options.</td>
</tr>
<tr>
<td>Yes/No</td>
<td>Displays a drop-down list with pre-defined options of “Yes” and “No.”</td>
</tr>
<tr>
<td>Dropdown</td>
<td>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 configurable products.</td>
</tr>
<tr>
<td>Multiple Select</td>
<td>Displays a drop-down list of values. To select more than one option, hold the Ctrl key down and click each item.</td>
</tr>
<tr>
<td>Price</td>
<td>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.</td>
</tr>
<tr>
<td>Media Image</td>
<td>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 media gallery.</td>
</tr>
<tr>
<td>Fixed Product Tax</td>
<td>Lets you define FPT rates based on the requirements of your locale.</td>
</tr>
<tr>
<td>Visual Swatch</td>
<td>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.</td>
</tr>
<tr>
<td>Text Swatch</td>
<td>A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.</td>
</tr>
</tbody>
</table>
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.

6. When complete, tap Save Config.
CHAPTER 20:
Using a Flat Catalog

Magento typically stores catalog data in multiple tables, based on the Entity-Attribute-Value (EAV\(^1\)) 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.

---

\(^1\)Entity Attribute Value
Flat Catalog Setup

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.”

   ![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.

Step 2: Verify the Results

Method 1: Verify the Results for a Single Product

1. On the Admin sidebar, tap Products. Then, choose Categories.
   a. Open a product in edit mode.
   b. In the Name field, add the text “_TEST” to the end of the product name.
2. Tap Save.
3. On a new browser tab, navigate to the home page of your store. Then, do the following:
a. Search for the product you edited.

b. 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**

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.

2. In the upper-left corner, verify that **Store View** is set to “All Store Views.” If prompted, tap **OK** to confirm.

3. 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**.
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**.

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, 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, choose **Categories**.
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 21:
Shared Catalogs

Magento gives you the ability to maintain gated “shared” catalogs with custom pricing for different companies. In addition to the standard “master” product catalog, Magento for B2B Commerce provides customer access to two types of shared catalogs with different pricing structures.

If Shared Catalog is enabled in the configuration, the original master catalog continues to be visible from the Admin, but only the “default” public shared catalog is visible from the storefront. In addition, custom catalogs can be created that are visible only to members of specific company accounts.

The Shared Catalogs grid lists the shared catalogs that are currently in existence, and provides tools to create and maintain the catalogs.

To access the Shared Catalogs page:

1. On the Admin sidebar, tap Catalog.
2. Choose Shared Catalogs.
### Column Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Selects shared catalog records for an action to be applied. The control in the header can be used to select all or deselect all shared catalog records in the grid. Mark the checkbox to select an individual shared catalog.</td>
</tr>
<tr>
<td>ID</td>
<td>A unique numeric identifier that is assigned in sequence when the catalog is created.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the shared catalog.</td>
</tr>
<tr>
<td>Type</td>
<td>Identifies the type of shared catalog as either:</td>
</tr>
<tr>
<td></td>
<td>Public: The default public shared catalog is created automatically when Magento for B2B Commerce is installed. It is initially assigned to the “General” and “Not Logged In” customer groups, and is visible to guests and individual logged-in customers who are not associated with a company. The system supports only one public shared catalog at a time.</td>
</tr>
<tr>
<td></td>
<td>Custom: A custom shared catalog contains pricing that is visible only to logged-in associates of the assigned company account(s). You can create as many custom shared catalogs as you need.</td>
</tr>
<tr>
<td>Customer Tax Class</td>
<td>The tax class that is assigned to the corresponding customer group. The Customer Tax Class column doesn’t appear in the default grid, but can be added by changing the column layout.</td>
</tr>
<tr>
<td>Created At</td>
<td>The date and time the shared catalog was created.</td>
</tr>
<tr>
<td>Created By</td>
<td>The first and last name of the store administrator who created the shared catalog.</td>
</tr>
<tr>
<td>Action</td>
<td>Lists actions that be applied to selected catalogs. Options: Set Pricing and Structure, Assign Companies, General Settings, Delete</td>
</tr>
</tbody>
</table>
Configuring Catalog Price Scope

If you have a multisite installation, make sure to configure the price scope before you create your shared catalogs. The price scope can be set to “Global,” or “Website”. However, it can be set only at the beginning of the setup process. The Website chooser appears during Step 2 of the shared catalog setup.

To configure the price scope:

1. On the Admin sidebar, tap Stores. Then under Settings, choose Configuration.
2. In the sidebar under Catalog, choose Catalog.
3. Expand the Price section.
4. Set Catalog Price Scope to “Website”.
5. Tap Save Config.
Creating a Shared Catalog

There are two ways to create a shared catalog. You can create a new shared catalog of either type, or duplicate an existing shared catalog. A newly created shared catalog does not include any products, and is not yet assigned to a company.

When a shared catalog is created, the system automatically creates a customer group by the same name. For example, if you create a custom shared catalog called “ABC Catalog,” a corresponding customer group called “ABC Catalog” is also created. Assigning a company to the shared custom catalog is essentially the same as assigning them to a customer group.

A newly created shared catalog does not include products, custom pricing, or company associations — except for the public catalog which is automatically assigned to guests and to customers who are not associated with a company.

The following aspects of a shared catalog must be set up before it can be used:

- Catalog Scope
- Product Selection
- Custom Prices
- Company Assignment(s)

**Method 1: Create a New Shared Catalog**

1. On the Admin sidebar, choose Shared Catalogs.
2. In the upper-right corner, tap Add a Shared Catalog. Then, do the following:
   a. Enter a Name for the shared catalog.

   The name you assign is used throughout the Admin and customer dashboard, if applicable, to refer to the shared catalog. It also becomes the name of the corresponding customer group.
b. Set **Type** to “Custom”.

c. Choose the appropriate **Customer Tax Class** that applies to purchases made from the shared catalog.

The following screenshot shows a new custom catalog for a specific wholesale customer.

![New Shared Catalog](image)

### New Shared Catalog

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

The new catalog appears in the Shared Catalogs grid.

![New Shared Custom Catalog](image)

### New Shared Custom Catalog
Method 2: Duplicate an Existing Shared Catalog

A duplicate custom catalog retains the pricing model and structure of the original, but not the company associations. A corresponding customer group is also created with the same name as the duplicate catalog. By default, a duplicate catalog is named “Duplicate of” the original catalog.

If a public shared catalog is duplicated, the type of the duplicate catalog changes to “custom.”

Step 1: Create the Duplicate

1. On the Admin sidebar, tap Catalog. Then, choose Shared Catalogs.
2. Find the shared catalog in the grid. Then in the Action column, choose General Settings.
3. In the options across the top of the page, tap Duplicate. Then, update the following fields as needed:
   - Name
   - Type
   - Customer Tax Class
   - Description

4. When complete, tap Save.
Duplicate Shared Catalog

The duplicate appears in the Shared Catalogs grid, with a unique ID.

New Shared Catalog

Step 2: Complete the Setup

After creating a new shared catalog, it must be configured with the appropriate product selection, company assignment(s), and category permissions. To continue, see: Set Pricing and Structure.
## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BUTTON BAR</strong></td>
<td></td>
</tr>
<tr>
<td>Back</td>
<td>Returns to the Shared Catalogs page without saving the new shared catalog.</td>
</tr>
<tr>
<td>Reset</td>
<td>Clears the form of any unsaved changes, and restores the original catalog detail information.</td>
</tr>
<tr>
<td>Save and Continue Edit</td>
<td>Saves all changes, and keeps the form open in edit mode.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves changes, closes the form, and returns to the Shared Catalogs page.</td>
</tr>
<tr>
<td><strong>CATALOG DETAILS</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Identifies the shared catalog throughout the Admin, and in the customer account(s) where it is available. The catalog name should be descriptive and no more than 32 characters in length. You cannot have two shared catalogs with the same name. Maximum characters: 32</td>
</tr>
<tr>
<td>Type</td>
<td></td>
</tr>
<tr>
<td>Custom</td>
<td>Identifies a catalog with custom pricing that is available only to the specific companies to which it is assigned.</td>
</tr>
<tr>
<td>Public</td>
<td>Identifies the shared catalog that is available to all guest visitors and to logged-in customers who are not associated with a company. A “default” public shared catalog is created when Magento B2B is installed, but must be configured by the administrator. Only one public shared catalog can exist at a time.</td>
</tr>
<tr>
<td>Customer Tax Class</td>
<td>Determines the tax class that is used for purchases made from the catalog. The options include all available tax classes.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief explanation of how the catalog is to be used.</td>
</tr>
</tbody>
</table>
Set Pricing and Structure

Setting up the pricing and structure of a shared catalog is a two-step process. Your current place in the process is highlighted with a number in the progress bar at the top of the page. You can view the other step in the process at any time by clicking the progress bar. For example, if you’re working on custom pricing, you might want to return to the product selection page for reference. Simply click “Products” in the progress bar at the top of the page. Then click “Pricing” to return to the custom pricing page. You will not lose any of your work.

In the standard category tree, the root category is the topmost container, and is referred to as “Default Category” in the sample data. However, when shared catalogs are enabled, the category tree has an additional outer container called “Root Catalog.” The root catalog encompasses all other category structures that exist in the system. To learn more, see Catalog Scope.

To set up catalog pricing and structure:

1. On the Admin sidebar, tap Catalog. Then, choose Shared Catalogs.
2. Find the catalog in the grid. Then in the Action column, select Set Pricing and Structure.
3. The first time the shared catalog is configured, tap Configure to continue. Then, complete the following:
Step 1: Choose the Products

The first step in the process is to choose the products that you want to include in the shared catalog. The product selection page features the category tree on the left, and a synchronized product grid on the right. If you click a category in the tree, the products in the category appear in the grid.

Only categories with selected products appear in the top navigation when the shared catalog is viewed from the storefront. By default, only the first three category levels are included in the root category.

1. Use the Store chooser to set the scope of the configuration.

   The scope of the configuration can be set only before the shared catalog is saved for the first time. If you later edit the product selection, the Store chooser is not available.

2. In the category tree, do any of the following:

   - To include all products, click Select all, or mark the checkbox of the parent category.
   - To include specific categories of products, mark the checkbox of each category that you want to include.
   - To include or exclude an individual product, mark, or clear, the checkbox of product.

   The notation below each category in the tree shows the number of products from the category that are currently included in the shared catalog. The notation below the root category shows the total number of products from all categories that are currently selected for the shared catalog.

3. To view category products in the grid, click the name of the category in the tree. When a category is selected, the following occurs:
- The toggle in the first column of the grid is set to the green “On” position for each selected product.
- If a product is assigned to multiple categories, and is deselected in one of them, it will continue to be available through the other categories, and also when using catalog search.
- The system automatically sets Category Permissions to “Allow” for the selected products.

4. If necessary, use the filters and other grid controls to find the products that you want to include in the shared catalog.

You can individually select, or deselect, individual products by clicking the toggle in the first column.

If you select a category that has no products, but is linked to CMS content or an external link, it will be included in the top navigation that is visible to customers from the storefront.

The category settings you make aren’t permanently recorded in the database until the configuration is saved. However, they are saved temporarily as you work on the structure and pricing.

5. Click Next.
Step 2: Set Custom Prices

You can set custom pricing for each product individually, or use the Action control to set custom pricing as a fixed amount or percentage for multiple product records.

Fixed  Specifies the final product price. For example, if you enter a fixed price of $10.00, the price in the storefront for the corresponding company is $10.00.

Percentage  Determines the custom price based on the discount percent. For example, to offer a 10 percent discount, set the custom price type to “Percentage,” and enter 10. The discounted custom price is 90 percent of the original product price.

The Custom Price column of the grid can be used to set the discount to a fixed amount or a percentage for the following product types:

- Simple (including configurable product variations)
- Bundle
- Downloadable
- Virtual

The Custom Price column is blank for configurable and grouped products types, and gift cards. To apply custom prices to products with complex options, see: .

The selection of products in the grid cannot be changed from the Custom Prices page. However, you can use the progress indicator at the top of the page to return to the previous step and change the selection of products.

Apply a Custom Price

1. For a multisite installation, set the Website chooser to the website where the custom prices apply.
2. Use one of the following methods to select the products where the custom pricing is to apply.

- Use the category tree to select all products in a specific category.
- Set the Mass Actions control in the header to “Select All”
- Mark the checkbox of individual product(s).

The grid displays the products in the currently selected categories, and you can use the standard controls to find products and filter the list.

3. Set the **Actions** control to one of the following:

   Set Discount    Applies a discount percent to all selected products.
   Adjust Fixed Price    Applies a fixed price to all selected products.
4. When prompted, enter the discount and tap **Apply**.

**Set Discount**

The discount is applied to all selected products, and the Custom Price column reflects the type of discount and amount applied.
5. When the custom pricing is complete, tap **Generate Catalog**. Then, tap **Save**.

**Apply a Tier Price**

Tier pricing lets you offer a quantity discount for products in the shared catalog. The Tier Price column of the grid contains a link to the Advanced Pricing options that apply specifically to the shared catalog. If the product already includes tier pricing, the number of existing tiers appears in parentheses after the link.

The following instructions show how to apply tier pricing to a single product. To apply tier pricing to multiple products, see: Importing Tier Prices.

1. Find the product in the grid. Then in the Tier Price column, click **Configure**.

2. On the Advanced Pricing page, tap **Add Price**. Then, do the following:
Catalog and Tier Price

a. Choose the **Website** where the tier price applies.

b. Enter the quantity of the product that must be purchased to receive the discount.

c. Set **Price** to one of the following discount types:

   - Fixed
   - Discount

d. Enter the amount of the discount.

e. To enter another tier, tap **Add Price**. Then, repeat the process.

Multiple Tier Prices

3. When complete, tap **Done**.

   In the grid, the number of tiers is shown in parentheses in the Tier Price column.
**Multiple Tiers**

The shared catalog is now saved to the database. Its name appears in the Shared Catalog column of the Products grid. The next step is to assign the shared catalog to a company.
Assign Companies

There are two ways to assign a company to a shared catalog. You can make the assignment from the Shared Catalogs grid, or edit the company and assign the shared catalog as you would choose a customer group.

**Method 1: Assign Companies from Shared Catalogs**

1. On the Admin sidebar, tap **Catalog**. Then, choose **Shared Catalogs**.
2. Find the shared catalog in the grid. Then in the **Action** column, select **Assign Companies**.

The list of available companies appears in the grid. Companies that are already assigned to the catalog do not appear in the list.
3. Find the company that you want to assign to the shared catalog. Then in the Action column, click Assign.

4. Repeat for each company that you want to assign to the shared catalog.

   The company is assigned to the shared catalog, and is removed from the list of available companies.

5. When complete, tap Save.

**Method 2: Edit the Company**

1. On the Admin sidebar, tap Customers. Then, choose Companies.

2. Find the company in the grid. Then in the Action column, click Edit.

![Edit Company](image-url)

*Edit Company*
3. On the company page, scroll down and expand the **Advanced Settings** section.

![Customer Groups / Shared Catalogs](image)

4. Set **Customer Group** to the appropriate shared catalog.

   Changing the shared catalog assignment also changes the customer group assignment for all company members.

5. When prompted to confirm, tap **Proceed**. Then, **Save**.
Managing a Shared Catalog

The Shared Catalogs page provides access to the tools you need to manage your shared catalogs. The page is similar to the standard Admin workspace, with filters and action controls. The grid lists all shared catalogs, including the default public shared catalog, and any custom catalogs that you have set up.

![Shared Catalogs](image)

### Shared Catalog Actions

The **Actions control** in the upper-left corner can be used with the mass actions control to delete selected shared catalogs that are no longer needed. In the grid, the Actions column contains the full selection of tools to manage your shared catalogs.

#### Action Controls

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Pricing and Structure</td>
<td>Determines the product selection and custom pricing that is available in the shared catalog.</td>
</tr>
<tr>
<td>Assign Companies</td>
<td>Determines which companies can access a custom shared catalog.</td>
</tr>
<tr>
<td>General Settings</td>
<td>Determines the catalog detail information, including the name, catalog type, customer tax class, and description.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the selected shared catalog(s).</td>
</tr>
</tbody>
</table>
Adding Products to a Shared Catalog

Products can be added to a shared catalog either individually, or in groups of multiple products by category.

The following requirements must be met for a complex product — such as bundle, grouped, or configurable — to be visible from the storefront in a shared catalog:

- All associated products and options must be assigned to the same shared catalog, and be enabled in the master catalog.
- For configurable and grouped products, only the enabled associated products are visible.
- For a bundle product, all options must be included in the shared catalog.

### Method 1: Add Single Product

1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Find the product in the grid, and open in **Edit** mode.
3. Scroll down, and expand the **Product in Shared Catalogs** section. Then, do the following:
   a. Mark the checkbox of each shared catalog where the product is to appear. To choose all catalogs, click **Select all**

   The name of each selected catalog appears in the Shared Catalogs field.
b. Tap **Done** to save the settings.

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

**Method 2: Add Multiple Products**

1. On the Admin sidebar, tap **Catalog**. Then, choose **Shared Catalogs**.

2. Find the shared catalog in the grid. Then in the **Action** column, select **Set Pricing and Structure**.

1. In the category tree, do any of the following:

   - To include all products, click **Select all**, or mark the checkbox of the parent category.
   - To include specific categories of products, mark the checkbox of each category that you want to include.
   - To include or exclude an individual product, mark, or clear, the checkbox of product.

   The notation below each category in the tree shows the number of products from the category that are currently included in the shared catalog. The notation below the root category shows the total number of products from all categories that are currently selected for the shared catalog.

2. To view category products in the grid, click the name of the category in the tree. When a category is selected, the following occurs:
• The toggle in the first column of the grid is set to the green “On” position for each selected product.

• If a product is assigned to multiple categories, and is deselected in one of them, it will continue to be available through the other categories, and also when using catalog search.

• The system automatically sets Category Permissions to “Allow” for the selected products.
Updating the General Information

The detail information of any shared catalog can be easily updated from the Action column of the Shared Catalogs grid. The changes you make are reflected in any associated company accounts.

To update the catalog details:

1. On the Admin sidebar, tap Catalog. Then, choose Shared Catalogs.
2. Find the shared catalog in the grid. Then in the Action column, select General Settings.
3. Update the catalog detail information as needed.
- Changing the name of a shared catalog, also changes the name of the corresponding customer group.

- Changing the catalog type from “Custom” to “Public” converts the existing public catalog to a custom catalog. Any companies associated with the original public catalog are reassigned to the replacement. A public catalog cannot be converted to a custom catalog.

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

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BUTTON BAR</strong></td>
<td></td>
</tr>
<tr>
<td>Back</td>
<td>Returns to the Shared Catalogs page without saving changes.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the catalog and reassigned any associated companies and their members to the public shared catalog.</td>
</tr>
<tr>
<td>Reset</td>
<td>Restores the original values to any fields with unsaved changes.</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Creates a duplicate copy of the catalog. For a custom catalog, the pricing model and structure of the original, but without the company associations. If a public shared catalog is duplicated, the type of the duplicate catalog changes to “custom.” A corresponding customer group is also created with the same name as the duplicate catalog. By default, a duplicate catalog is named “Duplicate of” the original catalog.</td>
</tr>
<tr>
<td>Save and Continue Edit</td>
<td>Saves all changes to the catalog detail information, and keeps the form open in edit mode.</td>
</tr>
<tr>
<td>Save</td>
<td>Sales changes, closes the form, and returns to the Shared Catalogs page.</td>
</tr>
</tbody>
</table>

**CATALOG DETAILS**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Identifies the shared catalog throughout the Admin, and in the customer account(s) where it is available. Changing the name of a shared catalog, also changes the name of the corresponding customer group. The catalog name should be descriptive and no more than 32 characters in length. You cannot have two shared catalogs with the same name. Maximum characters: 32</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>Changing the catalog type from “Custom” to “Public” converts the existing public catalog to a custom catalog. Any companies associated with the original public catalog are reassigned to the replacement. A public catalog cannot be converted to a custom catalog.</td>
</tr>
<tr>
<td>Custom</td>
<td>Identifies a catalog with custom pricing that is available only to specific companies.</td>
</tr>
<tr>
<td>Public</td>
<td>Identifies the shared catalog that is available to all guest visitors and to logged-in customers who are not associated with a company. A “default” public shared catalog is created when Magento B2B is installed, but must be configured by the administrator. Only one public shared catalog can exist at a time.</td>
</tr>
<tr>
<td><strong>Customer Tax Class</strong></td>
<td>Determines the tax class that is used for purchases made from the catalog. The options include all available tax classes.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>A brief explanation of how the catalog is to be used.</td>
</tr>
</tbody>
</table>
Updating the Product Selection

The selection of products in any shared catalog can be easily updated from the Action column of the Shared Catalogs grid. The changes you make are visible to members of any associated company accounts. The process is essentially the same as choosing products for a new catalog structure, except that the scope of the configuration cannot be changed.

To update the product selection:

1. On the Admin sidebar, tap Catalog. Then, choose Shared Catalogs.

2. Find the shared catalog in the grid. Then in the Action column, select Set Pricing and Structure.

3. Follow the instructions in Step 1: Choose Products. You can skip the first step, because the scope of a shared catalog cannot be changed after it is saved for the first time.
Updating Custom Pricing

The custom pricing of products in any shared catalog can be easily updated from the Action column of the Shared Catalogs grid. The changes you make are visible to in the storefront to members of the associated company or customer group. The process is essentially the same as setting custom pricing for a new shared catalog, except that the scope of the configuration cannot be changed.

To update the custom pricing:

1. On the Admin sidebar, tap Catalog. Then, choose Shared Catalogs.
2. Find the shared catalog in the grid. Then in the Action column, select Set Pricing and Structure.
3. On the Catalog Structure page, tap Configure. Then, do one of the following:
   - In the progress indicator at the top of the page, click Pricing.
   - In the upper-right corner, tap Next.
4. Follow the instructions in Step 2: Set Custom Prices.
Updating Category Permissions

Category permissions are automatically set to “Allow” for products that are added from the category tree to a shared catalog. You can later adjust the permissions, or create additional rules, as needed.

To update category permissions:

1. On the Admin sidebar, tap Catalog. Then, choose Categories.

2. In the category tree, select the category of the products that you want to update. To include all products, select the top-level category in the tree.

3. Scroll down and expand the Category Permissions section. Then, click New Permission and do the following:

   a. Choose the Customer Group that corresponds to the shared catalog, and change the permission settings as needed.

   b. To create a new permissions rule for another customer group, tap New Permissions, and repeat the process.

4. When complete, tap Save.
MARKETING
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.
CHAPTER 22:
Marketing Menu

The Marketing menu provides access tools for managing promotions, communications, SEO, and user-generated content.

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.

Social

Connect your store to Facebook.
**SEO & Search**

Analyze search terms and synonyms to help customers find products in the store, manage metadata, 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 23:

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.
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.

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**.

![Email a Friend Form](image)
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. If you prefer not to show customer wish lists in the side bar, they can be hidden from view in the configuration.

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.

![Wish List in Customer Account](image)

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 the wish lists, and determines the email template and sender of email messages that are used when a wish list is shared. By default, a customer's wish list appears in the sidebar when shopping while logged in to their account.

**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, do the following:
   a. Verify that **Enabled** is set to “Yes.”
   b. To allow customers to maintain more than one wish list, set **Enable Multiple Wish Lists** to “Yes.”
   c. If applicable, enter the **Number of Multiple Wish Lists** that each customer can maintain.
   d. By default, a customer’s wish lists appear in the sidebar of storefront pages. If you prefer to hide the wish lists, set **Show in Sidebar** to “No.”

4. Expand ☑️ the **Share Options** section. Then, do the following:
   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 Lists Link** section. Then, set **Display Wish Lists Summary** to one of the following:

- Display number of items in wish list
- Display item quantities

![My Wish Lists 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.
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 an item, hover over the image, and enter 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.
To transfer an item to your cart:

1. To add a single item, do the following:
   a. Hover over the item, and enter the Qty that you want to add to the cart.
   b. 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.

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.
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 usually appears 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.

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.
Compare Products

LUMA

Compare Products

Gobi HeatTech® Tee

🌟🌟🌟🌟🌟 4.8 stars

$28.00

Add to Cart

Logan HeatTech® Tee

🌟🌟🌟🌟🌟 4.8 stars

$24.00

Add to Cart

<table>
<thead>
<tr>
<th>SKU</th>
<th>Description</th>
</tr>
</thead>
</table>
| M504 | When the training gets intense, the Gobi HeatTech® 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.  
  • Orange micropolyester shirt.  
  • HeatTech® wicking fabric.  
  • Crew neckline.  
  • Machine wash/dry. |

<table>
<thead>
<tr>
<th>SKU</th>
<th>Description</th>
</tr>
</thead>
</table>
| M510 | Soft and lightweight, the Logan HeatTech® 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.  
  • Semi-fitted.  
  • Crew neckline.  
  • Machine wash/tumble dry. |

Comparing 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:

   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.

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.
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.
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.

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.
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](image-url)

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](image-url)

6. When complete, tap Save Rating.
Promotions
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:

- 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

A rule is a collection of conditions (one or more) that apply changes in prices to products when one or all are met. Each rule can have multiple conditions, applying when all or any (one or more, but not all) statements are true or false.

Conditions are statements that refine the list of products and situations for applying the rule. The attributes and options for conditions differ between the types of available rules. When met, the action is completed such as discounts, buy one get one free (BOGO), and other options. Rules can be simple or as complicated as need to match your business needs, seasonal discounts and promotions, and year long opportunities. For example, you may want to add a few more options for the holidays while providing free shipping year-round when carts have a high subtotal.

For catalog price rules, you build conditions based on attribute sets in your catalog, comparison functions, and selected attributes. You create the conditions like sentences by selecting a few statements. For example, you may create two price rules to apply discounts for childrens clothing and mens/womens clothing based on the category.

Example options for Catalog Price Rule

**Cart price rule** conditions can be based on any category that is a child of the store’s root. Price rules are set up in advance, and spring into action whenever the required conditions are met. These rules use attributes including product attribute combination like matching a SKU in the cart using product attributes, product subselction like the total quantity matching conditions, condition combinations for complicated rules, and cart attributes like subtotal.

Example options for Cart Price Rule

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.

- **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 24: 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.

### Catalog Rules

<table>
<thead>
<tr>
<th>Rule</th>
<th>Percentage</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>5% discount</td>
<td>20% off all new and existing orders</td>
<td>500</td>
</tr>
<tr>
<td>2</td>
<td>10% discount</td>
<td>10% off all new orders</td>
<td>500</td>
</tr>
</tbody>
</table>
Creating a Price Rule

Process Overview:
Step 1: Add a New Rule
Step 2: Define the Conditions
Step 3: Define the Actions

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.

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:

   ![Image of the first condition]

   **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:

   ![Image of the second condition]

   **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.

2. Tap the Add (.addButton at the beginning of the next line. Select an option for the condition, such as a product attribute or combination.

   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.”
The selected condition appears in the statement, followed by two more bold links. The options differ depending on the condition attribute you select. 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. These options may include different comparisons, such as matching values, including or not including at least one of a value, as well as greater than, equal to, or less than a numerical amount. In this example, the options are “is” and “is not.”

c. Select or enter values for the condition. Depending on the condition, you may select products from a grid or list, enter a numerical value, and so on. For this example, tap the “more” link, and choose the attribute set upon which the condition is based.

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 Section](image)

   **Actions**

2. Under **Pricing Structure Rules**, set **Apply** to one of the following:

   - **Apply as percentage of original**
     Discounts item by subtracting a percentage of the regular\(^*\) price. For example:
     Enter 10 in **Discount Amount** for a final\(^**\) price that is marked down 10% from the regular price.

   - **Apply as fixed amount**
     Discounts item by subtracting a fixed amount from the regular price. For example:
     Enter 10 in **Discount Amount** for a final price that is $10 less than the regular price.

   - **Adjust final price to this percentage**
     Adjusts the final price by a percentage of the regular price. For example:
     Enter 50 in **Discount Amount** for a final price that is marked down 50% from the regular price.

   - **Adjust final price to discount value**
     Sets the final price to a fixed, discounted amount. For example:
     Enter 20 in **Discount Amount** for a final price of $20.00.

\(^*\) Regular price refers to the base product price without any advanced pricing (special/tier/group) or promotional discounts.

\(^**\) Final price refers to the discounted price that appears in the shopping cart.
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.

---

**Step 5: Schedule the Rule**

1. Tap **Save and Continue Edit**.

The Scheduled Changes timeline appears at the top of the page.
2. In the 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.

3. 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: Scheduled Changes for Catalog 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.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. As new rules are added, Magento recalculates the prices and the priorities accordingly.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RULE INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Rule Name</td>
<td>(Required) The name of the rule is for internal reference.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the rule should include the purpose of the rule, and explain how it is used.</td>
</tr>
<tr>
<td>Websites</td>
<td>(Required) Identifies the websites where the rule can be used.</td>
</tr>
<tr>
<td>Customer Groups</td>
<td>(Required) Identifies the customer groups to which the rule applies.</td>
</tr>
<tr>
<td>Priority</td>
<td>A number that indicates the priority of this rule in relation to others. The highest priority is number 1.</td>
</tr>
<tr>
<td><strong>CONDITIONS</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Specifies the conditions that must be met before the catalog price rule goes into action. If left blank, the rule applies to all products.</td>
</tr>
<tr>
<td><strong>ACTIONS</strong></td>
<td></td>
</tr>
<tr>
<td>Apply</td>
<td>Determines the type of calculation that is applied to the purchase.</td>
</tr>
<tr>
<td></td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>Apply as percentage of original  Discounts item by subtracting a percentage of the regular * price.</td>
</tr>
<tr>
<td></td>
<td>Apply as fixed amount  Discounts item by subtracting a fixed amount from the regular price.</td>
</tr>
<tr>
<td></td>
<td>Adjust final price to this percentage  Adjusts the final price by a percentage of the regular price.</td>
</tr>
<tr>
<td></td>
<td>Adjust final price to discount value  Sets the final price to a fixed, discounted amount.</td>
</tr>
<tr>
<td></td>
<td>*Regular price refers to the base product price without any advanced pricing (special/tier/group) or promotional discounts.</td>
</tr>
<tr>
<td></td>
<td>**Final price refers to the discounted price that appears in the shopping cart.</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>(Required) The amount of discount that is offered.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discard Subsequent Rules</td>
<td>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</td>
</tr>
</tbody>
</table>

**RELATED BANNERS**

Identifies any banner(s) that are associated with the rule.
Scheduled Changes for Catalog Price Rules

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 as part of a campaign, 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.
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. When creating this rule, you want to set conditions to match any products of selected SKUs. When building the rule, you can easily browse and select SKUs without needing to know all of your product SKUs from memory.

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.”
   b. Tap Add (ADD) at the beginning of the next line. Then, in the list under Product Attribute, choose SKU.
For the comparison, you have options. If you want to locate at least one from a list of SKUs, select **is one of**. If you want to locate a group of SKUs that all must be found to apply, select **is**. We recommend selecting **is one of**.

to complete the condition, click the (___) “more” link. Then, tap the **Chooser** button for the list of available products.

Browse, filter, or search to find the SKUs you want to add. 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.

Complete the rule, including any **Actions** to be taken when the conditions are met.

When complete, tap **Save**.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.
CHAPTER 25:
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
Create 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 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:
   a. Under **Rule Information**, complete the **Rule Name** and **Description**.
   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:
   a. Select the **Websites** where the promotion is to be available.
   b. 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 have the cart rule applied to all cart items, set **Coupon** to "No Coupon" and skip to step 5.
   To associate a **coupon** with a price rule, set **Coupon** to “Specific Coupon.” Then, do the
   following:
Create a Cart Price Rule

CHAPTER 25: Cart Price Rules

Coupon Settings

a. Enter a free-text **Coupon Code** that the customer must enter to receive the discount.

b. To set a limit on the number of times the coupon can be used, complete the following:

   **Use per Coupon**
   - Determines how many times the coupon code can be used.
   - If there is no limit, leave the field blank.

   **Use 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**.

5. To set a limit on the number of times the coupon can be used, complete the following:

   **Use 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.

6. Enter a number to define the **Priority** of this price rule in relation to the Action settings of other price rules which are active at the same time.

   The Priority setting is important when two cart rules/coupon codes are valid for the same product at the same time. The rule with the highest Priority setting (1 being the highest) will control the cart action.

7. To apply the rule to published **RSS feeds**, set **Public In RSS Feed** to “Yes.”
8. This is a good time to save your work. Tap **Save and Continue Edit**.

After the rule is saved, the name of the cart price rule and the Scheduled Changes box appears at the top of the page.

*Scheduled Changes*
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.

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. Select an option for the condition, such as cart attribute, product subselection, or combination. 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.
4. To add more conditions, click Add (>Create) 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](image)

**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 the original price of 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 fixed amount from the cart total. For example: Enter 10 in Discount Amount to subtract $10 from the cart total. By default, the discount applies only to the cart subtotal. To apply the discount to the subtotal and shipping separately, see **Apply to Shipping Amount**.

- **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 separately to the subtotal and shipping amounts.
- 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.

![Discount Label in Totals Section of Order](image)

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**.
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.

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.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. As new rules are added, Magento recalculates the prices and the priorities accordingly.
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<tr>
<td>Rule Name</td>
<td>(Required) The name of the rule is for internal reference.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the rule should include the purpose of the rule, and explain how it is used.</td>
</tr>
<tr>
<td>Active</td>
<td>(Required) Determines if the rule is currently active in the store. Options: Yes / No</td>
</tr>
<tr>
<td>Websites</td>
<td>(Required) Identifies the websites where the rule can be used.</td>
</tr>
<tr>
<td>Customer Groups</td>
<td>(Required) Identifies the customer groups to which the rule applies.</td>
</tr>
<tr>
<td>Coupon</td>
<td>(Required) Indicates if a coupon is associated with the rule. Options:</td>
</tr>
<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.</td>
</tr>
<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>
<tr>
<td>Auto</td>
<td>Displays the Coupons Information section to define the format of the coupon codes to be generated.</td>
</tr>
<tr>
<td>Uses per Customer</td>
<td>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.</td>
</tr>
<tr>
<td>Priority</td>
<td>A number that indicates the priority of this rule in relation to others. The highest priority is number 1.</td>
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### Field Descriptions (cont.)

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<tr>
<th>FIELD</th>
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</thead>
<tbody>
<tr>
<td>Public in RSS Feed</td>
<td>Determines if the promotion is included in your store's public RSS feed. Options: Yes / No.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>CONDITIONS</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>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.</td>
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<td></td>
<td></td>
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<tr>
<td><strong>ACTIONS</strong></td>
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</tr>
<tr>
<td>Apply</td>
<td>Determines the type of calculation that is applied to the purchase. Options:</td>
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<td></td>
<td>Percent of product price discount</td>
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<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Fixed amount discount</td>
</tr>
<tr>
<td></td>
<td>Discounts item by subtracting a fixed amount from the original price of 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.</td>
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<td></td>
<td>Fixed amount discount for whole cart</td>
</tr>
<tr>
<td></td>
<td>Discounts the entire cart by subtracting a fixed amount from the cart subtotal. For example: Enter 10 in Discount Amount to subtract $10 from the cart subtotal. By default, the discount applies only to the cart subtotal. To apply the discount to the subtotal and shipping separately, see Apply to Shipping Amount.</td>
</tr>
<tr>
<td></td>
<td>Buy X Get Y Free (discount amount is Y)</td>
</tr>
<tr>
<td></td>
<td>Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>(Required) The amount of discount that is offered.</td>
</tr>
<tr>
<td>Maximum Qty Discount is</td>
<td>Sets the maximum number of products that the discount can be applied to in the same purchase.</td>
</tr>
<tr>
<td>Applied To</td>
<td></td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

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<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount Qty Step (Buy X)</td>
<td>Sets the number of products represented by “X” in a “Buy X Get Y Free” promotion.</td>
</tr>
<tr>
<td>Apply to Shipping Amount</td>
<td>Determines if the discount applies to the cost of shipping. Options:</td>
</tr>
<tr>
<td></td>
<td>Yes: Applies the discount separately to the subtotal and shipping amounts.</td>
</tr>
<tr>
<td></td>
<td>No: Applies the discount only to the subtotal.</td>
</tr>
<tr>
<td>Discard Subsequent Rules</td>
<td>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</td>
</tr>
<tr>
<td>Free Shipping</td>
<td>Determines if free shipping is included in the promotion, and if so, for which items. Options:</td>
</tr>
<tr>
<td></td>
<td>No: Free shipping is not available when a coupon that is based on the rule is used.</td>
</tr>
<tr>
<td></td>
<td>For matching items only: Free shipping is available only for specific items in the cart that match the rule.</td>
</tr>
<tr>
<td></td>
<td>For shipment with matching items: Free shipping is available for the entire cart when a coupon that is based on the rule is used.</td>
</tr>
<tr>
<td>Add Reward Points</td>
<td>Specifies the number of reward points that are earned by the customer whenever the price rule is applied.</td>
</tr>
</tbody>
</table>

### LABELS

<table>
<thead>
<tr>
<th>LABELS</th>
<th>DESCRIPTION</th>
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<tbody>
<tr>
<td>Default Rule Label for All Store Views</td>
<td>A default label that identifies the discount and can be used for all store views.</td>
</tr>
<tr>
<td>Store View Specific Labels</td>
<td>If applicable, specifies a different label to identify the discount for each store view.</td>
</tr>
</tbody>
</table>

### RELATED BANNERS

Identifies any banner(s) that are associated with the rule.
Coupon Codes

Coupons 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.

3. To make the coupon valid for a period of time, do one of the following:
Schedule New Update

1. Tap **Schedule New Update** in the upper-right corner of the page. Then, do the following:

![Schedule Update](image)

2. Enter the **Update Name** and **Description**.

3. Choose the **Start Date** and **End Date** from the Calendar (📅). If you leave the date range empty, the rule will not expire.

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

Assign to Existing Update

1. Select **Assign to Another Update**.

2. Find the update in the list, and tap **Select**.

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](image)

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.
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.

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:
      i. Alphanumeric
      ii. Alphabetical
      iii. 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 aggregates data from each coupon that is used during a specific date range. Because coupons are applied from the shopping cart, the report includes data from all redeemed coupons, regardless of order status. As a result, the report might include both projected and actual totals. The report can be filtered for a specific store view, time period, order status, and cart price rule.

In the following example, the coupon code “H20” was used by two customers. One of the orders is invoiced, but the other is still “pending.” The projected Sales Subtotal, Sales Discount, and Sales Total columns show the aggregated amounts from both orders, but only the actual invoiced order appears in the Subtotal, Discount, and Total columns. Each row in the report represents a single coupon promotion.

<table>
<thead>
<tr>
<th>Date</th>
<th>Coupon Code</th>
<th>Description</th>
<th>Qty</th>
<th>Sales Subtotal</th>
<th>Sales Discount</th>
<th>Sales Total</th>
<th>Subtotal</th>
<th>Discount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan 25, 2019</td>
<td>H20</td>
<td>$4 Large water bottles (case 72)</td>
<td>2</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
</tr>
<tr>
<td>Total</td>
<td>2</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
<td>$40.00</td>
<td>$0.00</td>
<td>$40.00</td>
</tr>
</tbody>
</table>
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 “Last updated” message at the top of the workspace. Then, mark the **Coupons** checkbox, and tap **Refresh**.

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.

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FILTER</strong></td>
<td></td>
</tr>
<tr>
<td>Date Used</td>
<td>Identifies the date field that is used as the basis of the report. Options:</td>
</tr>
<tr>
<td>Order Created</td>
<td>Generates the report based on the date the order was placed by the customer. To ensure that the most current data is included, click the link in the message to refresh statistics.</td>
</tr>
<tr>
<td>Order Updated</td>
<td>Generates the report based on the date orders were last updated. This report uses real-time data, and does not require statistics to be refreshed.</td>
</tr>
<tr>
<td>Period</td>
<td>Determines the type of date range that is used for the report.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Options: Day / Month / Year</td>
<td></td>
</tr>
<tr>
<td>From</td>
<td>Indicates the first date in the range of order data that is included in the report.</td>
</tr>
<tr>
<td>To</td>
<td>Indicates the last date in the range of order data that is included in the report.</td>
</tr>
<tr>
<td>Order Status</td>
<td>Filters the report by order status. The report can be generated for all orders, or limited to a specific order status. Options:</td>
</tr>
<tr>
<td>Any</td>
<td>Includes all orders regardless of status.</td>
</tr>
<tr>
<td>Specified</td>
<td>Includes only orders with the specified status. Canceled orders are not included in the report.</td>
</tr>
<tr>
<td>Empty Rows</td>
<td>Determines if the report includes any rows of empty data that might be retrieved. Options: Yes / No</td>
</tr>
<tr>
<td>Cart Price Rules</td>
<td>Determines which coupon promotions are included in the report. Options:</td>
</tr>
<tr>
<td>Any</td>
<td>Includes order information from any coupon promotion that was used during the specified date range.</td>
</tr>
<tr>
<td>Specified</td>
<td>Includes only order information from the specified coupon promotion during the specified date range.</td>
</tr>
</tbody>
</table>

Report Column Descriptions

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interval</td>
<td>Indicates the date range of coupon usage to be included in the report. The interval can be a specific day, month, or year, or range of dates. The interval date is formatted as follows, according to the Period setting:</td>
</tr>
<tr>
<td>Day</td>
<td>6/21/19</td>
</tr>
<tr>
<td>Month</td>
<td>6/2019</td>
</tr>
<tr>
<td>Year</td>
<td>2019</td>
</tr>
</tbody>
</table>
### Report Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coupon Code</td>
<td>The Discount Code that is entered by customers in the shopping cart to receive the discount.</td>
</tr>
<tr>
<td>Price Rule</td>
<td>The name of the price rule that is associated with the coupon.</td>
</tr>
<tr>
<td>Uses</td>
<td>The number of times the coupon has been used during the date range specified for the report.</td>
</tr>
<tr>
<td>Sales Subtotal</td>
<td>The projected Subtotal from all orders that were placed with the coupon. The Sales Subtotal represents the aggregated Subtotal from all qualifying orders, and includes “pending” sales orders that are not yet invoiced.</td>
</tr>
<tr>
<td>Sales Discount</td>
<td>The projected Discount amount from all orders that were placed with the coupon. The Discount represents the aggregated discount amount from all qualifying orders, and includes “pending” sales orders that are not yet invoiced.</td>
</tr>
</tbody>
</table>
| Sales Total    | The projected Grand Total from all orders that were placed with the coupon. The Sales Total includes any shipping and handling fees, less the discount amount. The Sales Total represents the aggregated Grand Total amount from all qualifying orders, and includes “pending” sales orders that are not yet invoiced. The value includes the Subtotal plus Shipping & Handling, less the Discount, plus Tax. 
  \[((\text{Subtotal} + \text{Shipping & Handling}) - \text{Discount}) + \text{Tax}\] |
| Subtotal       | The aggregated Subtotal from all invoiced orders that used the coupon.                                                                        |
| Discount       | The aggregated Discount from all invoiced orders that used the coupon.                                                                        |
| Total          | The aggregated Order Total from all invoiced orders that used the coupon.                                                                     |
Scheduled Changes for Cart Price Rules

Cart price rules can be applied on schedule as part of a campaign, 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.
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.

<table>
<thead>
<tr>
<th>Process Overview:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1: Enable Free Shipping</td>
</tr>
<tr>
<td>Step 2: Create a Cart Price Rule</td>
</tr>
<tr>
<td>Step 3: Complete the Labels</td>
</tr>
<tr>
<td>Step 4: Save and Test the Rule</td>
</tr>
</tbody>
</table>

**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.”

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.

![Condition](image)

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](image)
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.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.
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. This is the first of two conditions that can be added to the rule, and determines when the rule is triggered. It can be based upon a combination of product attributes, products, cart attributes, and customer segments. If left blank, the rule is triggered for every cart.

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 three.

e. If you want to prevent other discounts from being applied to the purchase, set **Discard subsequent rules** to "Yes."

![Actions](image)

**Buy 3 Get 1 Free**

2. To apply the rule only to specific items in the cart, complete the condition to describe the cart item(s) and/or product attribute(s) that are required for the promotion. The following example uses the SKU to apply the rule to all associated variations of a configurable product.

![Apply the rule only to cart items matching the following conditions](image)

**Condition for Cart Items**

3. To include **Free Shipping**, choose one of the following options:
   - For matching items only
   - For shipment with matching items

4. 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.
Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.

**Examples**

Buy X Get Y Free is processed as a single action, with a “row total” dependency. All items must be from the same SKU to qualify for the promotion. For example:

Buy X quantity of product from category A, get Y quantity of the same product for free.

To limit the free product to categories A, B, and C, set the action as follows:

If ALL of these conditions are TRUE:
Category is one of A, B, C

To limit the free items from any category A, B, C and receive Y from SKUs D123, E123, F123, set the action as follows:

If ALL of these conditions are TRUE:
SKU is one of D123, E123, F123

Use the following formula to determine the correct value for the Maximum Qty Discount:

Formula = (X+Y) * (M/Y)
Where
X = number of items purchased
Y = number of free items
M = Maximum number of free items allowed

For example:

Buy 5 Get 2 Free with maximum of 4 free items allowed.
Where
X = 5
Y = 2
M = 4
Maximum Qty Discount = (5+2)*(4/2)=(7)*(2)=14
Buy 5 Get 3 Free with maximum of 9 free items allowed.
Where

\[ X = 5 \]
\[ Y = 3 \]
\[ M = 9 \]

Maximum Qty Discount = \((5+3)*(9/3) = 24\)

Buy 20 Get 2 Free with maximum of 20 free items allowed.
Where

\[ X = 20 \]
\[ Y = 2 \]
\[ M = 20 \]

Maximum Qty Discount = \((20+2)*(20/2) = (22)*(10) = 220\)
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.

3. Tap Add at the beginning of the next line. Then in the list under Product Attribute, choose Category.
a. Click the (...) “more” link to display additional options.

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.

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.

   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.
5. Tap **Save and Continue Edit**.

### Step 3: Define the Actions

1. Expand the **Actions** section, and do the following:

   ![Actions](image)

   **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.

Price rules are automatically processed with other system rules each night. When you create a new price rule, allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly.

Discount with First Purchase

Cart price rules can be used to automatically offer a discount to customers on their first purchase, with no coupon needed.

To offer a discount that is targeted to first-time customers, you can:

- Create a customer segment that is defined as "buyers with no orders", and then
- Create a cart price rule that targets the new customer segment.

Ensure that the Customer Segments feature is enabled. Refer to Creating a Customer Segment.

Step 1: Create a Customer Segment

1. On the Admin sidebar, click Customers and choose Segments.
2. In the upper-right corner, click Add Segment.
3. Define the General Properties.
   a. Enter a Segment Name to identify the customer segment (Example: First-time customer).
   b. For Assigned to Website, select the website where the customer segment can be used.
   c. For Status, select “Active”.
   d. For Apply to, select "Visitors and Registered Customers".
   e. When complete, click Save and Continue Edit. Additional options become available in the panel on the left.
Define the Conditions.

For this example, the condition targets customers for whom \textit{Total Number of Orders is less than 1} is True.

a. In the panel on the left, choose \textbf{Conditions}. The default condition begins, “If ALL of these conditions are TRUE:”.

b. Click \textbf{Add} (ائد) and select "Number of Orders" in the drop-down list.

c. Click \textbf{is} and select "less than" in the drop-down list.

d. Click \textbf{...} and enter "1" in the field.

e. Click the green checkmark (✓) to save the condition setting.

f. Click \textbf{Save}.

\textbf{Defined Segment Condition}

Your customer segment is created and displayed in the Customer Segment list.
Customer Segments List

Make note of the segment ID. You’ll use the ID number to create the cart price rule.

Step 2: Create a Cart Price Rule

1. On the Admin sidebar, click Marketing. Then under Promotions, choose Catalog Price Rule.

2. In the upper-right corner, click Add New Rule. The Rule Information section displays by default, with expandable sections for Conditions and Actions.

3. Define the Rule Information.
   a. Complete the Rule Name and Description fields. These fields are for your internal reference only.
   b. For Websites, select the website where the rule is to be available.
   c. For Customer Groups, select the customer group to which this rule applies.
      To select multiple groups, hold down the Ctrl key (PC) or the Command key (Mac), and click each option. The options in this list are dependent on the customer groups created and managed in Admin > Customers > Customer Groups.
   d. For Coupon, select "No Coupon".
   e. For Uses per Customer, enter "1".
   f. For Priority, enter a number to establish the priority of this rule in relation to other rules.
      The Priority setting is important when the same catalog product meets the conditions set for more than one price rule. The rule with the highest Priority setting becomes active for the customer. The highest priority is 1. For this example, entering "1" means that this rule is applied before any other price rule. This value will be used by the Discard Subsequent Rules setting in the Action section.
   g. When complete, click Save and Continue Edit. Additional options become available in the panel on the left.
4. Define the **Conditions**.

   a. Scroll down and expand (.inflate) the **Conditions** section. The default rule begins, "If ALL of these conditions are TRUE."

   b. Click **Add** (.inflate) and select "Customer Segment" in the drop-down list. The qualifier field defaults to "matches".

   c. Click ... and enter the segment ID of the customer segment you wish to target. For this example, the segment ID for the new segment created in Step 1 is "2".

   If you don't know the segment ID, click the chooser icon (.inflate) to display the Customer Segment list. You can manually enter the ID in the field or mark the checkbox for the desired segment to auto-populate the field.

   d. Click the green checkmark (.inflate) to save the condition setting.

   e. When complete, click **Save and Continue Edit**.

   This line of the rule applies to all customers who match customer segment ID 2.
Defining the Customer Segment

**5. Define the Actions.**

This section defines the type of discount and value/amount of the discount you want to apply for first-time customers. This example defines a 10% discount or all customers who meet the defined condition. For information on other available options, see Creating a Cart Price Rule.

- **a.** Scroll down and expand (…) the Actions section.
- **b.** For Apply, select "Percent of product price discount".
- **c.** For Discount Amount, enter "10".
- **d.** To apply this price rule only to product amounts, set Apply to Shipping Amount to "No".
- **e.** To prevent the system from applying multiple pricing rules to the same product, set Discard Subsequent Rules to “Yes”.
- **f.** When complete, click Save.

**Price Rule Actions**

The new rule is normally available within the hour. You should test the rule to ensure that it works as you defined it.
CHAPTER 26:  
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.

![Related Products Rules](image-url)
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:
2. In the upper-right corner, tap Add Rule.
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.

5. In the panel on the left, choose Products to Display. Then, build the results condition as you would for a catalog price rule.

6. Complete the condition to describe the products that you want to include in the results.

7. When complete, tap Save.
## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>A name that identifies the rule for internal use.</td>
</tr>
</tbody>
</table>
| Priority       | 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.  
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.  
Any up-sell, cross-sell, and related products that were manually configured always appear on the page before any rule-based product promotions. |
| Status         | Controls the active status of the rule. Options: Active / Inactive                                                                                                                                              |
| Apply To       | Identifies the type of product relationship that is associated with the rule. Options include:  
- Related Products  
- Up-sells  
- Cross-sells                                                                                                                                           |
| 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.                                |
| Customer Segments | 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.

<table>
<thead>
<tr>
<th>RULES</th>
<th>PRIORITY</th>
<th>MATCHING PRODUCTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule 1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Rule 2</td>
<td>2</td>
<td>6</td>
</tr>
<tr>
<td>Rule 3</td>
<td>3</td>
<td>20</td>
</tr>
</tbody>
</table>

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:

   ![Rule-Based Product Relations]

   **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.**
Merchandising
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 27:  
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 Catalog. Then 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 control in the upper-right corner of the product tile, and drop the product into 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 can use only categories with an ID number of 3 or greater.
### Workspace Controls

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>![List Icon]</td>
<td>View as List</td>
</tr>
<tr>
<td>![Tiles Icon]</td>
<td>View as Tiles</td>
</tr>
<tr>
<td>![Rule Icon]</td>
<td>Match by Rule</td>
</tr>
<tr>
<td>![Drag Icon]</td>
<td>Drag</td>
</tr>
<tr>
<td>![Position Icon]</td>
<td>Position</td>
</tr>
<tr>
<td>![Remove Icon]</td>
<td>Remove from Category</td>
</tr>
<tr>
<td>![PerPage Icon]</td>
<td>View Per Page</td>
</tr>
<tr>
<td>![GoToNext and Previous Icon]</td>
<td>Go To Next / Previous</td>
</tr>
</tbody>
</table>
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.”

Make sure to configure each attribute that is used in the rule as a "smart" attribute.

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 "smart" 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.
Step 1: Configure the “Smart” Attributes

1. For each attribute that is to be used in the rule, make sure that the “Use in Product Listing” storefront property is set to “Yes”.

2. Complete the configuration to identify each “smart” attribute that is to be used with Visual Merchandiser.

Step 2: Create the 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.

   ![Add Condition to Category Rule](image)

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.
When setting up a category rule, the products are matched and assigned to the rule when the category is saved. Therefore, if you add a new product to the catalog and want to include it in the rule, you must re-save each category that is set to match products by rule, to ensure that the new product is included.

### Menu Options

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match products by rule</td>
<td>Determines if the list of products in the category is dynamically generated by a category rule. Options: Yes / No</td>
</tr>
<tr>
<td>Automatic Sorting</td>
<td>Automatically applies a sorting order to the list of category products. Options: None, Move low stock to top, Move low stock to bottom, Special price to top, Special price to bottom, Newest products first, Sort by color, Name: A - Z, Name: Z - A, SKU: Ascending, SKU: Descending, Price: High to Low, Price: Low to High</td>
</tr>
</tbody>
</table>

**Add Condition**

Adds an additional condition to the rule.

### CONDITIONS

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Determines the attribute that is used as the basis of the condition. Options:</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>
### Menu Options (cont.)

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

**Operator**

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:

- Equal
- Not equal
- Greater than
- Greater than or equal to
- Less than
- Less than or equal to
- Contains

**Value**

Specifies the value the attribute must have to meet the condition.

**Logic**

The Logic column is used to define multiple conditions, and appears only when an additional condition is added. The operators follow the rules of precedence for MySQL boolean operators. Options:

- AND
- OR
Configuring “Smart Attributes” for 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.

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.
   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 28:
Gift Registries

Magento for B2B 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 Information

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

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Information</td>
<td>The General Information section typically includes the name of the event, a message or description of the event, privacy settings, and event status.</td>
</tr>
<tr>
<td>Event Information</td>
<td>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.</td>
</tr>
<tr>
<td>Gift Registry Details</td>
<td>The Gift Registry Details might include additional information that is specific to the occasion.</td>
</tr>
<tr>
<td>Registrant Information</td>
<td>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.</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>The Shipping Address section shows where gifts are to be sent, and includes the information a carrier needs to deliver the package.</td>
</tr>
</tbody>
</table>
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.”

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.
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.
8. When complete, tap **Save**.

### Field Descriptions

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GENERAL INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Code</td>
<td>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 (_).</td>
</tr>
<tr>
<td>Label</td>
<td>The name of the gift registry type that appears in the store.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Determines the sequence in which this gift registry type appears when listed with other types.</td>
</tr>
<tr>
<td>Is Listed</td>
<td>Determines if the gift registry type is available to customers in the store. Options: Yes / No.</td>
</tr>
<tr>
<td><strong>ATTRIBUTES</strong></td>
<td></td>
</tr>
<tr>
<td>Code</td>
<td>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 (_).</td>
</tr>
<tr>
<td>Input Type</td>
<td>Determines the type of data and input control that is associated with the attribute, according to type. Options:</td>
</tr>
<tr>
<td><strong>Custom Types</strong></td>
<td></td>
</tr>
<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>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>Displays the attribute as a date field.</td>
</tr>
<tr>
<td>Country</td>
<td>Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No.</td>
</tr>
</tbody>
</table>

#### Static Types

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Determines how the date attribute is used in the store. Options:</th>
</tr>
</thead>
<tbody>
<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:</td>
</tr>
<tr>
<td></td>
<td>Short (3/23/2014)</td>
</tr>
<tr>
<td></td>
<td>Medium (Mar 23, 1914)</td>
</tr>
<tr>
<td></td>
<td>Long (March 23, 1914)</td>
</tr>
<tr>
<td></td>
<td>Full (Sunday, March 23, 2014)</td>
</tr>
</tbody>
</table>

| 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." |

<table>
<thead>
<tr>
<th>Attribute Group</th>
<th>Select the group where the attribute is listed in the gift registry. Options:</th>
</tr>
</thead>
</table>

---

547

Magento for B2B Commerce User Guide
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Information</td>
<td>Groups all gift registry attributes that add the information about the gift registry event, its time, place, etc.</td>
</tr>
<tr>
<td>Gift Registry Properties</td>
<td>Combines all attributes that add information directly about the gift registry.</td>
</tr>
<tr>
<td>Privacy Settings</td>
<td>Lists the attributes that add information about the gift registry event privacy.</td>
</tr>
<tr>
<td>Recipients Information</td>
<td>Groups the attributes that provide information about the person who creates a gift registry.</td>
</tr>
<tr>
<td>Label</td>
<td>The name that identifies the attribute in the customer’s account dashboard.</td>
</tr>
<tr>
<td>Is Required</td>
<td>Indicates if the attributes is a required entry. The gift registry cannot be saved until all required attributes are complete. Options: Yes / No.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Determines the sequence in which attribute appears when listed with other attributes.</td>
</tr>
</tbody>
</table>
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:

   ![General Options](image)

   **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:

   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:

   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:

   ![](Gift Registry Update.png)

   **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.
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**.

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.
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.
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

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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SETTINGS</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>Identifies “Gift Registry Search” as the type of Widget.</td>
</tr>
<tr>
<td>Design Theme</td>
<td>The theme that is used by the store where the Gift Registry Search is to appear.</td>
</tr>
<tr>
<td>STOREFRONT PROPERTIES</td>
<td></td>
</tr>
<tr>
<td>Widget Title</td>
<td>A name for internal reference.</td>
</tr>
<tr>
<td>Assign to Store Views</td>
<td>Identifies the store views where the Gift Registry Search is to be available.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Indicates the order that Gift Registry Search block appears if there are other blocks assigned to appear in the same location.</td>
</tr>
<tr>
<td>LAYOUT UPDATES</td>
<td></td>
</tr>
<tr>
<td>Display On</td>
<td>Indicate the specific pages, or types of pages where Gift Registry Search is to appear.</td>
</tr>
<tr>
<td>Categories</td>
<td>If applicable, identifies the category pages where Gift Registry Search is to appear.</td>
</tr>
<tr>
<td>Container</td>
<td>Indicates the page layout block where Gift Registry Search will be placed. The options vary by template and theme.</td>
</tr>
<tr>
<td>WIDGET OPTIONS</td>
<td></td>
</tr>
<tr>
<td>Quick Search Form Types</td>
<td>Determines the types of searches that can be performed with Gift Registry Search. Options: All Forms Registrant Name Search Registrant Email Search Gift Registry ID Search</td>
</tr>
</tbody>
</table>
CHAPTER 29:

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.

Reward points are not recommended for use with COD purchases, because receipt of payment cannot be confirmed until after the order is invoiced.

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.

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 Customer](image)

**Actions for Acquiring Reward Points by Customer**

a. To display a message in the shopping cart that includes the rewards points earned for the purchase and the customer’s current reward point balance, set **Purchase** to "Yes."

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 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.

**Step 3: Complete the Email Notification Settings**

1. Expand the **Email Notification Settings** section. Then, do the following:

   ![Email Notification Settings](image)

   **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.

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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>The website(s) where the reward rates apply.</td>
</tr>
<tr>
<td>Customer Group</td>
<td>The customer group(s) to which the reward rates apply.</td>
</tr>
<tr>
<td>Direction</td>
<td>Determines which type of transaction the exchange rate define. Options include:</td>
</tr>
<tr>
<td>Points to Currency</td>
<td>Defines the number of points that can be applied as credit towards the amount of an order.</td>
</tr>
<tr>
<td></td>
<td>In the first rate field, enter the number of points. In the second Rate field, enter the monetary value of the points.</td>
</tr>
<tr>
<td>Currency to Points</td>
<td>Defines the amount of an order that can earn the customer a number of points.</td>
</tr>
<tr>
<td></td>
<td>In the first Rate field, enter the monetary value. In the second Rate field, enter the number of points represented by the monetary value.</td>
</tr>
</tbody>
</table>
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.

   ![Adding Reward Points to Price Rule](image)

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 30:
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 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.

Catalog Event Carousel
When the Catalog Event widget is enabled in the configuration, it can be placed on store pages as a listing of 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.

Catalog Event Carousel

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.
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:

   ![Catalog Events](image)

   **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. If you want to display only one event in the slider at a time, enter “1.”
   
   d. Enter the number of **Events to Scroll per Click in Event Slider Sidebar Widget**. By default, this value is set to 2. If you want the slider to display the next event in sequence when clicked, enter “1.”
   
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](image)

**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. To display a list of upcoming events in your store, you must also set up a Catalog Events Carousel widget.

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.
   b. In the Catalog Event Information section, do the following:
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Global</td>
<td>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.</td>
</tr>
<tr>
<td>Start Date</td>
<td>Global</td>
<td>The starting date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.</td>
</tr>
<tr>
<td>End Date</td>
<td>Global</td>
<td>The ending date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.</td>
</tr>
<tr>
<td>Image</td>
<td>Store View</td>
<td>Uploads an image that appears in the Catalog Events Carousel widget.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>Global</td>
<td>Determines the sequence in which this event appears when listed with other events.</td>
</tr>
<tr>
<td>Display Countdown Ticker On</td>
<td>Global</td>
<td>Displays the countdown ticker in the header of each page specified. Options include: Category Page / Product Page</td>
</tr>
<tr>
<td>Status</td>
<td>Global</td>
<td>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</td>
</tr>
</tbody>
</table>
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.

![Edit Event](image)

*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*.

**Catalog Events Carousel**

The Catalog Events Carousel widget displays a slider of upcoming events with a countdown ticker for each event. You can choose the page(s) and area of the page layout where the carousel
is to appear, and control the width and number of events that appear at a time. The result you get depends on your theme, where it’s positioned to appear on the page, and the options that you choose.

![Event Carousel in Left Sidebar](image)

**Step 1: Enable the Catalog Carousel Widget**

1. Before you begin, follow the instructions to configure the Catalog Event widget is enabled for the storefront.

![Catalog Events](image)

**Step 2: Create the 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 “Catalog Events Carousel.”

b. Choose the **Design Theme** that is used by the store.

4. Tap **Continue**.

![Widget Type](image)

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.)
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 Container one of the following:
      - Main Content Area
      - Sidebar Additional
      - Sidebar Main

   *The results vary according to theme and page layout. The “Catalog Events Carousel Default Template.” must also be specified in the category configuration.*

   d. If you want the Events Carousel to appear in an additional location in the storefront, tap Add Layout Update. Then, repeat these steps.
2. Tap Save and Continue Edit.

For now, you can ignore the message to refresh the cache.

**Step 4: Configure the Options**

1. In the panel on the left, choose Widget Options. Then, do the following:
   a. In the Frame Size field, enter the number of events that you want to list in the slider at the same time. To view only one event at a time, enter “1.”
   b. In the Scroll field, enter the number of event listings that you want to scroll per click. To scroll to the next event, enter “1.”

2. For a custom width, enter the number of pixels in the Block Custom Width field. The custom width for the example on this page is set to 250 pixels.

3. When complete, tap Save.

4. When prompted to refresh the cache, click the link in the message at the top of the workspace, and follow the instructions.
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:

![General section of invitation configuration settings](image)
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 Settings](image)

   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
  - Admin Email
- Customizing Email Templates
  - Header Template
  - Footer Template
  - Message Templates
- Configuring Email Communications

Sales Documents
- Configuring Sales Emails
- PDF Logo Requirements
- Adding Reference IDs to Header

Email Reminder Rules
- Configuring Email Reminders
- Creating Email Reminders
- Email Reminder Templates

Newsletters
- Configuring Newsletters
- Newsletter Templates
- Sending Newsletters
- Managing Subscribers

RSS Feeds

Using Variables
- Adding Predefined Variables
- Creating Custom Variables
- Markup Tags
- Variable Reference
CHAPTER 31:
Email

Email templates define the layout, content, and formatting of automated messages sent from your store. They are called transactional emails\(^1\) 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.

\(^1\)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 for B2B Commerce.

Desktop Clients

<table>
<thead>
<tr>
<th>OPERATING SYSTEM</th>
<th>CLIENTS SUPPORTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>OS X 10.8</td>
<td>Apple Mail 6</td>
</tr>
<tr>
<td>OS X 10.7</td>
<td>Outlook 2011</td>
</tr>
<tr>
<td></td>
<td>Outlook 2013</td>
</tr>
<tr>
<td>Windows 8</td>
<td>Outlook 2010</td>
</tr>
<tr>
<td>Windows 7</td>
<td>Outlook 2007</td>
</tr>
<tr>
<td></td>
<td>Outlook 2003</td>
</tr>
</tbody>
</table>

Mobile Clients

<table>
<thead>
<tr>
<th>OPERATING SYSTEM</th>
<th>CLIENTS SUPPORTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Android 4.2, “Jelly Bean”</td>
<td>Native email app</td>
</tr>
<tr>
<td>Android 2.3, “Gingerbread”</td>
<td>Native email app</td>
</tr>
<tr>
<td>Gmail App (Android 4.2)</td>
<td>Native email app</td>
</tr>
<tr>
<td>Blackberry 5 OS</td>
<td>Native email app</td>
</tr>
<tr>
<td>IOS 8</td>
<td>iPhone 6</td>
</tr>
<tr>
<td></td>
<td>iPhone 6 Plus</td>
</tr>
<tr>
<td>IOS 7</td>
<td>iPad (Retina)</td>
</tr>
<tr>
<td></td>
<td>iPad Mini</td>
</tr>
<tr>
<td></td>
<td>iPhone 5s</td>
</tr>
<tr>
<td><strong>Mail on these devices:</strong></td>
<td></td>
</tr>
<tr>
<td>IOS 6</td>
<td>iPhone 5</td>
</tr>
<tr>
<td></td>
<td>iPhone 4s</td>
</tr>
</tbody>
</table>
## Web Clients

<table>
<thead>
<tr>
<th>EMAIL APPLICATION</th>
<th>BROWSERS SUPPORTED*</th>
</tr>
</thead>
<tbody>
<tr>
<td>AOL Mail</td>
<td>Chrome, Internet Explorer, Firefox</td>
</tr>
<tr>
<td>Gmail</td>
<td>Chrome, Internet Explorer, Firefox</td>
</tr>
<tr>
<td>Yahoo! Mail</td>
<td>Chrome, Internet Explorer, Firefox</td>
</tr>
<tr>
<td>Outlook.com</td>
<td>Chrome, Internet Explorer</td>
</tr>
</tbody>
</table>

* 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.

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 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.

<table>
<thead>
<tr>
<th>LOGO DIMENSIONS</th>
<th>1 X (DISPLAY SIZE)</th>
<th>3 X (IMAGE SIZE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Width:</td>
<td>168 px</td>
<td>504 px</td>
</tr>
<tr>
<td>Height:</td>
<td>48 px</td>
<td>144 px</td>
</tr>
</tbody>
</table>

1The 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.

### 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](image)

**General Settings**

**Step 3: Complete the Details for Each Sales Email Message**

4. Expand the **Order** section. Then, do the following:

   ![Order](image)

   **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](image)

6. Complete the configuration for the remaining sales emails:
   - Invoice
   - Shipment
   - Credit Memo

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

**Configuring Company Email**

The sales representative that is assigned as the primary contact for a company is configured by default as the sender of many automated email messages sent to the company.

**To configure company email options:**

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Company Configuration**.
3. If necessary, set **Store View** to the store view to define the **scope** of the configuration.
4. Complete the fields in the following sections.

   To override the default setting of any field, clear the **Use system value** checkbox to make the field editable.
Company Registration

1. Set **Company Registration Email Recipient** to the store contact who is to be notified when a new company registration request is received.

2. In the **Send Company Registration Email Copy To** field, enter the email address of each person who is to receive a copy of the registration notification. Separate multiple email addresses with a comma.

3. To determine how the copy of the notification is sent, set **Send 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.

4. If you have prepared an email template that is to be used instead of the default, set **Default Company Registration Email** to the name of the template. By default, the “Company Registration Request” template is used.

Customer-Related Emails

If you have prepared alternate email templates to be used instead of the defaults, choose the template that you want to use for each of the following:

- Default ‘Sales Rep Assigned’ Email
- Default ‘Assign Company to Customer’ Email
- Default ‘Assign Company Admin’ Email
- Default ‘Company Admin Inactive’ Email
- Default ‘Company Admin Changed to Member’ Email
- Default ‘Customer Status Active’ Email
- Default ‘Customer Status Inactive’ Email
Company Status Change

1. Set **Company Status Change for Email Recipient** to the store contact who is to be notified when the status of a company changes.

2. In the **Send Company Status Change Email Copy To** field, enter the email address of each person who is to receive a copy of the status change notification. Separate multiple email addresses with a comma.

3. To determine how the copy of the notification is sent, set **Send 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.

4. Default ‘Company Status Change To Active 1’ Email

5. If you have prepared an email template that is to be used instead of the default when company status changes from “Pending Approval” to “Active,” set **Default ‘Company Status Change to Active 1’ Email** to the name of the template. By default, the “Company Status Active 1” template is used.
6. If you have prepared an email template that is to be used instead of the default when company status changes from “Rejected” or “Blocked” to “Active,” set Default ‘Company Status Change to Active 2’ Email to the name of the template. By default, the “Company Status Active 2” template is used.

7. If you have prepared an email template that is to be used instead of the default when company status changes to “Rejected,” set Default ‘Company Status Change to Rejected’ Email to the name of the template. By default, the “Company Status Rejected” template is used.

8. If you have prepared an email template that is to be used instead of the default when company status changes to “Blocked,” set Default ‘Company Status Change to Blocked’ Email to the name of the template. By default, the “Company Status Blocked” template is used.

9. If you have prepared an email template that is to be used instead of the default when company status changes to “Pending Approval,” set Default ‘Company Status Change to Pending Approval’ Email to the name of the template. By default, the “Company Status Pending Approval” template is used.

Company Credit Emails

1. Set Company Credit Change Email Sender to the store contact who is to be notified when a change is made to the credit limit that is assigned to a company. By default, the notification is sent to “Sales Representative.”

2. In the Send Company Credit Change Email Copy To field, enter the email address of each person who is to receive a copy of the credit change notification. Separate multiple email addresses with a comma.
3. To determine how the copy of the notification is sent, set **Send 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.

4. If you have prepared email templates to be used instead of the defaults, choose the template for each of the following notifications that are sent to the Company Admin.

   - **Allocated Email Template**
   - **Updated Email Template**
   - **Reimbursed Email Template**
   - **Refunded Email Template**
   - **Reverted Email Template**

5. 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.
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](image)

**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.

---

**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](image)

**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.

![Header Template Information](image)

**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 **Transactional Emails** section.

4. Choose the **Header Template** that is used as the default for email notifications.

5. When complete, tap **Save Config**.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LOAD DEFAULT TEMPLATE</strong></td>
<td></td>
</tr>
<tr>
<td>Template</td>
<td>Lists the selection of available templates, and identifies the template to be customized.</td>
</tr>
<tr>
<td><strong>TEMPLATE INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Template Name</td>
<td>The name of your custom template.</td>
</tr>
<tr>
<td>Insert Variable</td>
<td>Inserts a Store Contact Information variable into the template at the cursor location.</td>
</tr>
<tr>
<td>Template Subject</td>
<td>The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.</td>
</tr>
<tr>
<td>Template Content</td>
<td>The content of the template in HTML.</td>
</tr>
<tr>
<td>Template Styles</td>
<td>Any CSS style declarations that are needed to format the template header can be entered in the Template Styles box.</td>
</tr>
</tbody>
</table>
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.

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.
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.

![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.
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.
### Field Descriptions

#### LOAD DEFAULT TEMPLATE

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

#### TEMPLATE INFORMATION

<table>
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<tr>
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<td>The content of the template in HTML.</td>
</tr>
<tr>
<td>Template Styles</td>
<td>Any CSS style declarations that are needed to format the template footer can be entered in the Template Styles box.</td>
</tr>
</tbody>
</table>
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.

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.
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.

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

<table>
<thead>
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<td>Any CSS style declarations that are needed to format the template can be entered in the Template Styles box.</td>
</tr>
</tbody>
</table>
CHAPTER 32:
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.
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:

   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 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.

**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.
5. In the panel on the left, choose **Emails 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](image1)

**Default Titles and Description**

- Rule Title for All Store Views
- Rule Description for All Store Views

---

(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.

![Titles and Description per Store View](image2)

**Titles and Description per Store View**

- Main Website
  - Main Website Store
    - English
    - French
    - German
    - Spanish

---

8. When complete, tap **Save**.
### Trigger Conditions

<table>
<thead>
<tr>
<th>SOURCE</th>
<th>TRIGGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wish List</td>
<td>Number of days abandoned</td>
</tr>
<tr>
<td></td>
<td>Sharing</td>
</tr>
<tr>
<td></td>
<td>Number of items</td>
</tr>
<tr>
<td></td>
<td>Specific items</td>
</tr>
<tr>
<td>Shopping Cart</td>
<td>Number of days abandoned</td>
</tr>
<tr>
<td></td>
<td>Specific coupon code applied</td>
</tr>
<tr>
<td></td>
<td>Line items quantity</td>
</tr>
<tr>
<td></td>
<td>Items quantity</td>
</tr>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td></td>
<td>Virtual items</td>
</tr>
<tr>
<td></td>
<td>Specific Items</td>
</tr>
</tbody>
</table>

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RULE INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Rule Name</td>
<td>The name of the automated reminder rule identifies the rule internally.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the rule for internal reference.</td>
</tr>
<tr>
<td>Shopping Cart Price Rule</td>
<td>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.</td>
</tr>
<tr>
<td>Assigned to Website</td>
<td>The websites to receive automated reminder emails based on this rule.</td>
</tr>
<tr>
<td>Status</td>
<td>Activates the rule. If status is inactive, then all other settings are ignored, and the rule is not triggered. Options: Active / Inactive</td>
</tr>
<tr>
<td>From Date</td>
<td>The starting date for this automated reminder rule. If no date is specified, the rule becomes active immediately.</td>
</tr>
<tr>
<td>To Date</td>
<td>The ending date for this automated reminder rule. If no date is specified, the rule becomes active indefinitely.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Schedule</td>
<td>The number of days before the rule is triggered, and the reminder email sent again, provided the conditions are met.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

### EMAIL AND LABELS

<table>
<thead>
<tr>
<th>EMAIL AND LABELS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Templates</td>
<td>Determines the email template to be used for each store view.</td>
</tr>
<tr>
<td>Rule Title for All Store Views</td>
<td>Determines the title of the rule for each store view.</td>
</tr>
<tr>
<td>Rule Description for All Store Views</td>
<td>Determines the description of the rule for each store view.</td>
</tr>
</tbody>
</table>
Configuring Email Reminders

Email reminder rules can 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:
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.

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

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>MARKUP TAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coupon Code</td>
<td>{var coupon.getCode()</td>
</tr>
<tr>
<td>Coupon Usage Limit</td>
<td>{var coupon.getUsageLimit()</td>
</tr>
<tr>
<td>Coupon Usage Per Customer</td>
<td>{var coupon.getUsagePerCustomer()</td>
</tr>
<tr>
<td>Customer Account URL</td>
<td>{store url=&quot;customer/account/&quot;}</td>
</tr>
<tr>
<td>Customer Name</td>
<td>{var customer.getName()</td>
</tr>
<tr>
<td>Email Footer Template</td>
<td>{template config_path=&quot;design/email/footer_template&quot;}</td>
</tr>
<tr>
<td>Email Header Template</td>
<td>{template config_path=&quot;design/email/header_template&quot;}</td>
</tr>
<tr>
<td>Email Logo Image Alt</td>
<td>{var logo_alt}</td>
</tr>
<tr>
<td>Email Logo Image URL</td>
<td>{var logo_url}</td>
</tr>
<tr>
<td>Promotion Description</td>
<td>{var promotion_description</td>
</tr>
<tr>
<td>Promotion Name</td>
<td>{var promotion_name</td>
</tr>
<tr>
<td>Store Name</td>
<td>{var store.getFrontendName()}</td>
</tr>
<tr>
<td>Store URL</td>
<td>{store url=&quot;&quot;}</td>
</tr>
</tbody>
</table>
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](Image)

*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
   c. Until the current security issue is resolved, we highly recommend that you set Set Return Path to "No."
      - No (Recommended Security Measure) 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 Return Path Email field.

4. In the panel on the left under Sales, choose Sales Emails. Then, do the following:
   a. Expand the General Settings section.
   b. Set Asynchronous sending to “Enable.”

5. When complete, tap Save Config.
CHAPTER 33: Marketing Automation

Marketing Automation is a cloud-based tool powered by dotmailer that produces professional, personalized email communications and reports using data from your Magento store.

Dotmailer gives you the ability to:

- Create customized email communications
- Import contacts
- Schedule campaigns
- Create rules to add logic and automate your campaigns

Changes In the Latest Release

<table>
<thead>
<tr>
<th>New Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Abandoned carts can trigger automation program enrollments, in addition to regular campaign sends.</td>
</tr>
<tr>
<td>- All abandoned cart flows send CartInsight data in advance, which makes it possible to use the abandoned cart block in email campaigns.</td>
</tr>
<tr>
<td>- CustomInsight subscription process correctly sends renewal emails to previously subscribed customers. The data can be used in various campaigns to target customers who renew their subscriptions.</td>
</tr>
<tr>
<td>- Improved catalog synchronization for configurable, bundled, and grouped products improves product recommendation communications.</td>
</tr>
</tbody>
</table>
Setting Up dotmailer

To add dotmailer to your store, you must first sign up for a free trial account. Then, follow the instructions to complete the setup and gain access to the dotmailer dashboard.

For complete information, see the Dotmailer Quick Start - Configuration Guide Magento 2.

Step 1: Sign Up for a Free Trial

1. On the Admin sidebar, tap Stores. Then under Settings, choose Configuration.

2. In the panel on the left under Dotmailer, choose API Credentials.

3. Click the banner to start a free 14-day trial.

4. Complete the form, and click Create an Account.

5. When you receive an account activation email from dotmailer, click the activation link to get started. Then, do the following:
a. Follow the prompts to complete the onboarding process. Then, tap **Let's go!**

![Onboarding](image1)

b. Follow the prompts to read the Welcome message. Then, tap **Build your first campaign.**

![Welcome](image2)

c. Dotmailer is now enabled, and your **API Username** and **API Password** appear in the **Settings** section of the Magento configuration.
7. When complete, tap **Save Config**.

   Dotmailer is now integrated with your Magento installation.

**Step 2: Log in to Your dotmailer Account**

Go to the dotmailer site, and log into your new account. Then, check your email and follow the instructions to verify your account. When your account is verified, your dotmailer dashboard appears.

The Settings icon at the bottom of the sidebar provides access to your account details and administrative tasks.

**Edit Account Login Credentials**

1. Tap the **Settings** icon at the bottom of the sidebar. Then at the top of the menu, click **Edit details**.

**View /Edit Account Details**

1. Tap the **Settings** icon at the bottom of the sidebar. Then on the menu, choose **Account**.

2. Under **Permissions**, verify the following:
   - Mark the “All permissions” checkbox.
   - Mark the checkbox of each permission to be granted the user.

3. Review and update account details as needed.
4. When complete, tap **Save**.

**Add a New User**

1. Tap the **Settings** icon at the bottom of the sidebar. Then on the menu, choose **Access**.
2. Enter the **Email address** of the new user.
3. Under **Permissions**, do one of the following:
   - Mark the “All permissions” checkbox.
   - Mark the checkbox of each permission to be granted the new user.
4. When complete, tap **Save**.
5. An invitation is sent to the email address of the new user. To activate the account, the new user must do the following:
   a. Open the account activation message from dotmailer.
   b. Click the activation link.

**Add a New API User**

1. Tap the **Settings** icon at the bottom of the sidebar. Then on the menu, choose **Access**.

![dotmailer Settings - Access](image)

2. Tap **New user**. Then, do the following:
   a. Accept the randomly-generated **Email address**. Each API user must have a unique email address.
   b. In the **Description** field, describe how the account is to be used.
   c. To enter the password, do one of the following:
      - Click the **Password** field. Then, choose an existing password.
      - Enter a new password.

Then, enter the password again to confirm.
d. Verify that the **Status** “Enabled” option is selected.

e. When complete, tap **Save**.

The new API user is added to the list.

---

**API Users**

At some point while working with your free trial, you’ll be asked to verify your account. When prompted, click the free trial message above the header, and follow the instructions. Until then, your account will be shown as “unverified.”

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**Dotmailer Dashboard**

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**Step 3: Complete the Magento Configuration**

Magento and Dotmailer support numerous options for syncing and configuring features. For complete details, we recommend reviewing the Dotmailer Quick Start - Configuration Guide for Magento 2. This guide tracks all existing Dotmailer features in Magento 2.

These options include mapping and syncing orders, catalog, and abandoned carts.
Creating a Campaign

Dotmailer includes a large selection of professionally-designed email and newsletter templates for a variety of promotions and events. You can use one of their prepared templates, or design your own.

In this example, we will rework a prepared template for the Magento Luma demo store. The purpose of the example is to introduce you to different types of content building blocks and editing techniques.

Step 1: Create a Campaign

1. On the Welcome page, click create a quick tester campaign. Notice that the Campaigns option is now active in the main menu, and the email icon is highlighted in the sidebar.

2. Hover over the thumbnail image, to show the Select and Preview buttons. Then, do the following:
   - Tap Preview \( \text{Preview} \) to see a mockup of the template.
   - Tap Select \( \text{Select} \) to choose the template for your campaign.

3. Enter a Campaign name, and accept the default Campaign location as the folder where the campaign will be saved. Then, tap Continue.
4. To complete the setup of your simple test campaign, do the following:

a. Enter a **Subject** line for the email. Subject lines can be personalized for each recipient by using a placeholder. To learn how to add data fields, see Step 5.

b. Enter your **Friendly from name** that will appear in the header instead of your email address.

c. In the **From address** field, choose the email address that is to appear as the sender of the message. The list includes all email addresses that are associated with your account.

d. (Optional) All replies to your campaign are automatically stored in your dotmailer account. If you would like to send each reply to specific individuals, enter each **Forwarding address**, separated by comma.

e. (Optional) In the **Campaign tags** field, enter as many tags as needed to filter your campaigns for reporting purposes. Press the **Tab** key to separate multiple tags.

As you type, the Preview section shows how your message will appear in the inbox of each recipient. Notice how your “Friendly from name” is used to distinguish it from other email.
5. Above the Campaign details section, click the Campaign settings tab. For this test campaign, we will use the default settings. Tap **Save**.

---

**Step 2: Edit the Campaign Content**

1. Before you get started, it’s important to know that you can save your work at any time. If you log out and continue your work later, you can find the most recently saved version of your campaign in the menu under Campaigns > My Campaigns. To continue editing, find your campaign in the list, and click its name.

2. The content editor uses building blocks to represent each type of content that can be added to the template. The Build tab of the sidebar on the left displays the selection of building blocks that you can drag and drop into position. For this example, we will replace the sample content in the template with content of our own.

3. The following instructions walk you through each section of the template, and introduce editing and formatting tools, and techniques.

**Complete the Preheader (Optional)**

The space above the header can be used to enter a brief message. Click the text box, and enter the text that you want to appear above the header.
Upload Your Logo

1. On the Build tab, choose Images. To upload your logo, click Manage. Then, click here to upload the image. Choose the image that you want to upload. Image manager is similar to Media Storage, and is used to organize the images that are available in your dotmailer account.

It is recommended to limit the combined size of all images in a campaign to less than 100kb.

2. To organize your images, click New folder. Then, enter a name for the untitled folder. The new folder is nested below the original parent folder.

You can create as many folders as needed, and organize them any way you want. Over time, you will upload many images to your account, and it’s important to organize them in a way that makes them easy to find.

3. In the sidebar, click the parent folder that contains the logo that you uploaded. Then, drag the image to the new folder. Then, click Close (X) in the upper-right corner to return to the content editor.

4. The logo that you uploaded appears in the sidebar, where it can be dragged into position. Drag and drop your logo to replace the placeholder image.

Edit and Format Text

The next section of the template represents your store’s menu. However, it’s actually a building
block with a multi-column layout, similar to a table. The text in each cell can be edited and formatted separately. The Columns building block can be used in many ways to control the text layout.

1. Click the menu area, so you can see the multi-column layout. The Columns building block is located in the sidebar under Layout.

2. Click each cell and enter the menu options for your store. Then, use the toolbar to change the font, size, and style of the text, as needed.

**Add Links**

To link each menu option in the template to your store, do the following:

1. Open your store In another window, and click the first menu option. Then, copy the full URL.

2. In the template, select the text for the first menu option. Then in the toolbar, click the Hyperlink ( ) tool.

3. In the Link (URL) field, paste the link that you copied from your store.

4. If you want to later be able to track how many people click the link, enter a code for that menu option. Then, tap Insert.

5. Repeat these steps to link each menu option to your store.
Add a Link

Change the Background Color

1. In the sidebar, choose the **Styles** tab. Notice that Background layers is set to “Table row (tr).” In the underlying HTML of the template, the menu background is actually a row in a table.

2. In the template, hover over the menu background to highlight the entire row.

3. In the sidebar under the color picker, enter the hexadecimal code for the background color of your store's menu. In the Magento Luma store, the background color of the menu is #f0f0f0.

4. Tap **Save colour** to save the color in the My colors section of the sidebar.
Replace the Banner

1. On the **Build** tab of the sidebar, under Images, click **Add Image (+)**.
2. Choose the banner image that you want to upload. After a moment, the image appears in the sidebar.
3. From the sidebar, drag the new banner to replace the placeholder.

![Banner Image](image.png)

Add Featured Products

Dotmailer gives you the ability to dynamically incorporate data from your store into a template. However, for this simple example, product data is added as static images with links to your store. Although this template includes two rows of products, only one row is included to reduce the number of images. The “Shop Now” blocks was also removed from the template, because it didn’t introduce any new editing techniques.

1. Upload the image for each featured product.
2. Edit the text, as needed, for each featured product.
   
   The price can be updated as any other text field. To change the currency, simply type a dollar sign, or any other currency symbol that is needed.
3. To update the product buttons, do the following:
   a. Click the button to display its settings appear in the sidebar.
   b. Paste the **Button URL** for the corresponding product detail page. Then, update the color and formatting as needed.
   c. Repeat these steps for each product button.
Add Social Media Links

1. In the template, scroll down to the social media placeholder.
2. In the building blocks sidebar under **Tools**, drag the **Social Links** building block into position in the template. The empty building block appears either above or below the placeholder.
3. Click the empty building block to open the Social links settings. Then, do the following:
   a. Mark the checkbox of each social link that you want to include in the template.
   b. For each social link, paste the **URL** of your company profile page.
   c. When complete, tap **Apply**.
4. To adjust the format and spacing of the buttons, click anywhere in the social links building block. You can experiment with these settings to adjust the size and format of the buttons. To make your buttons look like the template, do the following:
   
a. In the sidebar under **Label position**, set **Horizontal** alignment to “Center.”
   
b. Under **Spacing**, set **Horizontal** to “15px” and **Vertical** to “None.”
   
c. To delete the placeholder social media links, click **Close ( X )** in the upper-right corner.
Complete the Footer

The information at the bottom of the template is important, and in many countries is required by law. You must provide a mechanism for recipients to unsubscribe, and clearly identify the sender of the email.

1. Do not change the “Unsubscribe” and “Forward this email “links, because they contain code that manages each operation. However, you can format the text if you like.

2. Click the Footer info text block, and enter your company information, including your registration number, if applicable, so recipients know who has sent the email.

3. Click the Company registered address text block, and complete the information. In this example, we added a link to the Contact Us page on our site.

4. The template is now fully customized for your store. Tap Save.

Step 3: Send a Test

1. To test your campaign, tap Test send in the template header.

2. To send the test email to yourself, mark the checkbox of the email address that is associated with your dotmailer account.

3. To add more recipients, click Add another email address. Then, do the following:
   a. Enter the Email address, First name and Last name of the recipient. Then, tap Add.
   b. Repeat these steps to add as many recipients as you want.
   c. Mark the checkbox of each additional recipient that is to receive the test email.

4. When you are ready to send the test campaign, tap Test Send. If prompted, tap Save and send.
5. Check your email to see how it looks!

**Step 4: Review the Summary Report**

The Summary Report validates the campaign, lists any errors that are found, and suggests areas for improvement.

In addition to the Summary Report, the Reports menu has a selection of Marketing Automation reports.

1. On the **Campaigns** menu, choose **My Campaigns**.

2. In the record for your test campaign, click **Summary** to view the summary report.

   This report says that the quality of the text content needs to be improved.
Step 5: Add a Personal Note

In this step, we’ll add a personal note with a link, and then do another test run.

1. Drag a text building block from the sidebar to the template. Then, do the following:
   a. Enter the word “Hi” to begin the greeting.
   b. In the toolbar at the top of the template, tap Data Fields.
   c. In the list of data fields, choose First name.
   d. Complete the note, and add a link. Then, Save your work.
Step 6: Preview the Campaign

1. In the button bar at the top of the workspace, tap **Preview**.

2. In the upper-right corner, click **Phone ( )**, and choose **Portrait** to see how the message looks on a mobile device.
3. Close the preview.

Import Your Contacts

Your dotmailer account is synced with your store, and maintains up-to-date address books of your customers, guests, and subscribers.

To view your contacts:

1. On the dotmailer menu, choose Campaigns > My Campaigns.

The contact list includes customer, guest and subscription data that is automatically imported from your store.
2. To view the import report, click the **Notifications** bell ( ) near the bottom of the sidebar. Whenever the data is updated, the number of updated imports appears in red.

   There are two recent imports available. Although this list doesn’t tell you what they are, one is your list of customers, and the other is your list of subscribers.

3. In the first message, click **import report**.

4. In the Notifications list, click **import report**.

   The Contacts import report includes a summary of all subscribers as well as duplicates, failures, soft and hard bounces, invalid email addresses, and those who have unsubscribed, or have been blocked, globally suppressed, or otherwise blacklisted. You can use this report to help keep your data clean.

5. After reading the report, tap **Go to address book**. This import contains your subscribers, and the other one contains your customers.
6. In the main menu, return to Contacts > My Contacts. This time, click the Magento_Customers address book.

7. To see all the things you can do with your customer data from dotmailer, click More actions. Using what we’ve covered so far, you should be able to create a newsletter campaign and send it to your list of subscribers.

Schedule Your Campaign

You now have a campaign and a list of customers. The next step is to schedule the campaign, and send it on its way.
To schedule a campaign:

1. On the dotmailer menu, choose Campaigns > My Campaigns.

2. Find your test campaign in the list, and in the last column, click Send ( ). Then, do the following:
   a. With Select address books or queries marked under step 1, choose the address book that is the target of the campaign. For this test campaign, mark the Magento_Customers checkbox.
   b. Complete the options to select when you want to send the campaign.
Schedule the Campaign

c. If you want to remail the campaign, select “Yes.” By default, campaigns are not sent a second time.

Remail Options

d. Tap Save & continue.

e. Take one last look at the report before you send the campaign. Then, scroll down to the bottom and tap Send campaign immediately. When prompted to confirm, tap Send.

Send Immediately

3. Congratulations! Your campaign is on its way!

Your Campaign Is On Its Way

4. To see the results, tap Check out the campaign report.
5. On the menu, choose **Dashboard** to see your progress. You have completed the first four tasks, and a notification is waiting for you at the bottom of the sidebar.

**Campaign Report**

**Dashboard**

**Automate Your Campaign**

dotmailer includes three prepared automation templates, plus a blank template that you can use to create custom programs. When setting up an automated campaign, you can use existing campaigns, or create placeholders for new ones. This example uses a prepared template to create a simple Welcome campaign with a follow-up message that is sent a week later.
Choose a Template

**Step 1: Create a New Program**

1. On the dotmailer menu, choose **Automation**. Then, tap **New program**.

2. To choose the **Welcome program** template, hover over the tile and tap **Select**. Then, do the following:

3. When prompted, enter the **Program name**. For now, you can accept the Programs folder location. Then, tap **Continue**.

The Edit program workspace includes a flowchart of the program logic. Each box in the diagram is a node. The panel on the left has a selection of nodes that can be added to the program. You can create sophisticated automations using these simple building blocks.
**Step 2: Complete the Start Options**

1. In the flowchart, click the **Start** node.

   The panel on the left provides an overview of the process, and walks you through each step.

2. Under **1. Enrolment scheduling**, tap **Set enrolment schedule**.
   
   - **a.** By default, the Welcome program is scheduled to run **Daily** at **11:00 AM**.
   
   - **b.** For this example, accept the default scheduling. Then, tap **Apply**.
3. Under **Enrolment rule**, tap **Trigger from contact date field**.

The options describe the event that triggers the rule. For this program, the welcome email campaign will be triggered whenever a new account is created.

Complete the trigger description as follows:

**Trigger from Date**

- **a.** Accept the option to **Trigger from contact date field**.
- **b.** To determine when contacts are added to the program, accept the default entry, **default entry 0 days after**.
- **c.** Set the **Date** field to **ACCOUNT.CREATED_DATE**.
- **d.** When complete, tap **Apply**.

4. Under **3. Enrolment limits**, tap **Set enrolment limits**. Then, do the following:
a. For this program, accept the default option to **re-enrol contacts every day they meet the start criteria.**

This option ensures that every person who signs up for a new account will be included in the next scheduled mailing.

b. Tap **Apply.**

5. Review the options in the **Start** panel. Then, tap **Apply.**

![Enrolment Limits](image)

**Step 3: Choose the Campaign**

1. In the flowchart, click the **Campaign** node. Then, do the following:

   a. To choose an existing campaign, tap **Select campaign.**

![Send Campaign](image)
Creating a Campaign

b. Tap **Create campaign**.

c. Enter the **Campaign name**, and accept the Campaigns folder as the default **Campaigns location**.

d. Tap **Create**.

![Create Campaign](image)

2. Tap **Apply**.

   The name of the new campaign appears in the Campaign box.

**Step 4: Set the Delay**

You can add a delay to the program to wait a number of days, or until a specific time of day, before sending a follow-up campaign.

1. In the flowchart, click the **Delay** node.

2. Accept the default **Wait** period of 7 days. Then, tap **Apply**.
Step 5: Create a Follow-Up Campaign

1. In the flowchart, click the next Campaign node.

2. Enter the Campaign name, and accept the Campaigns folder as the default Campaigns location.

3. Tap Create, then tap Apply. 

   Your follow-up campaign is added to the workflow.

Step 6: Define the End of the Program

All programs have defined starting and end points.

1. Click the End node.

2. For this example, you can accept the default name of the end point.

3. Tap Apply.
Step 7: Edit Your Campaign

If you added placeholders for new campaigns, you still need to complete the definition of each campaign. However, if you used existing campaigns, your Welcome program is good to go!

1. On the Automation menu, choose Trigger campaign content.
2. Find the campaign in the list, and click Edit (edit).
a. Enter a descriptive **Rule Name**.

b. Set **Rule Type** to one of the following:
   - Abandoned Cart Exclusion Rule
   - Review Email Exclusion Rule

c. Leave **Status** set to “Inactive” for now. You can later change it to “Active.”

d. Choose the **Websites** where the rule applies.

3. On the **Conditions** tab, set **Conditions Combination Match** to one of the following:
   - ANY
   - ALL
4. Tap **Add New Condition**. Then, do the following:
   a. Choose the **Attribute** that is the subject of the conditional statement.
   b. Under **Condition**, choose the operator.
   c. Enter the **Value** that is needed to complete the condition.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td>equals or less than</td>
<td>10</td>
</tr>
</tbody>
</table>

*Conditions*

d. For multiple conditions, tap **Add New Condition**. Then, repeat these steps.

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

**Automation Studio**

The Automation Studio option in the Marketing menu is a shortcut to the Dotmailer Developer configuration settings.

*Dotmailer Developer Configuration*

**To access Automation Studio:**

On the Admin sidebar, choose **Marketing**. Then under **Marketing Automation**, choose **Automation Studio**.
CHAPTER 34:

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 dot per inch (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.

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:

   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**

<table>
<thead>
<tr>
<th>FORMAT</th>
<th>REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PDF</strong></td>
<td></td>
</tr>
<tr>
<td>File Format</td>
<td>JPG (JPEG), PNG, TIF (TIFF)</td>
</tr>
<tr>
<td>Image Size</td>
<td>200 pixels wide x 50 pixels high</td>
</tr>
<tr>
<td>Resolution</td>
<td>300 DPI recommended</td>
</tr>
<tr>
<td><strong>HTML</strong></td>
<td></td>
</tr>
<tr>
<td>File Format</td>
<td>JPG (JPEG), PNG, GIF</td>
</tr>
<tr>
<td>Image Size</td>
<td>Determined by theme.</td>
</tr>
<tr>
<td>Resolution</td>
<td>72 or 96 DPI</td>
</tr>
</tbody>
</table>
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.

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

```javascript
{{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 35:
Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento for B2B 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\(^1\), 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:

\[\begin{array}{|l|l|}
\hline
\text{Allow Guest Subscription} & \text{Use system value} \\
\text{Need to Confirm} & \text{Use system value} \\
\text{Confirmation Email Sender} & \text{Use system value} \\
\text{Confirmation Email Template} & \text{Use system value} \\
\text{Success Email Sender} & \text{Use system value} \\
\text{Success Email Template} & \text{Use system value} \\
\text{Unsubscription Email Sender} & \text{Use system value} \\
\text{Unsubscription Email Template} & \text{Use system value} \\
\hline
\end{array}\]

\(1^{\text{The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.}}\)
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.

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.

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.”
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.
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.

---

**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.”
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.
CHAPTER 36:
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.

![RSS symbol] 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\(^1\), 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.

\(^1\)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.

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

7. Expand the Order section. Then, set Customer Order Status Notification to “Enable.”

8. When complete, tap Save Config.
### Types of RSS Feeds

<table>
<thead>
<tr>
<th>RSS FEED</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wish List</td>
<td>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.</td>
</tr>
<tr>
<td>New Products</td>
<td>Publishes notification of new products added to the catalog.</td>
</tr>
<tr>
<td>Special Products</td>
<td>Publishes notification of any products with special pricing.</td>
</tr>
<tr>
<td>Coupons / Discounts</td>
<td>Publishes notification of any special coupons or discounts that are available in the store.</td>
</tr>
<tr>
<td>Top Level Category</td>
<td>Publishes notification of any change to the top-level category structure of your catalog, which is reflected in the main menu.</td>
</tr>
<tr>
<td>Customer Order Status</td>
<td>Gives customers the ability to track their order status by RSS feed. When enabled, an RSS feed link appears on the order.</td>
</tr>
</tbody>
</table>
CHAPTER 37: 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.

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"}}
```

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

A markup tag is a directive that contains snippet of code with a relative reference to an object in your store, such as a variable, URL, image, or block. Markup tags can be used anywhere the editor is available and 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,

```html
{{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.

```html
{{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.

```html
{{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.

```html
{{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**

```html
{{block class="Magento\Contact\Block\ContactForm" name="contactForm" template="Magento_Contact::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**

```html
{{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**

```php
{{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**

```php
{{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.

- **store direct_url** Links directly to a page.
- **store url** 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**
   ```html
   <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**
   ```html
   <a href="{{store url='apparel/shoes'}}">Shoe Sale</a>
   ```
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:
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.

4. Set Use Static URLs for Media Content in WYSIWYG for Catalog to “Yes.”

5. When complete, tap Save Config.
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

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>MARKUP TAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Footer Template</td>
<td>{{template config_path=&quot;design/email/footer_template&quot;}}</td>
</tr>
<tr>
<td>Email Header Template</td>
<td>{{template config_path=&quot;design/email/header_template&quot;}}</td>
</tr>
<tr>
<td>Email Logo Image Alt</td>
<td>{{var logo_alt}}</td>
</tr>
<tr>
<td>Email Logo Image URL</td>
<td>{{var logo_url}}</td>
</tr>
<tr>
<td>Email Logo Image Height</td>
<td>{{var logo_height}}</td>
</tr>
<tr>
<td>Email Logo Image Width</td>
<td>{{var logo_width}}</td>
</tr>
<tr>
<td>Template CSS</td>
<td>{{var template_styles</td>
</tr>
</tbody>
</table>

### Store Contact Information Variables

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>MARKUP TAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Unsecure URL</td>
<td>{{config path=&quot;web/unsecure/base_url&quot;}}</td>
</tr>
<tr>
<td>Base Secure URL</td>
<td>{{config path=&quot;web/secure/base_url&quot;}}</td>
</tr>
<tr>
<td>General Contact Name</td>
<td>{{config path=&quot;trans_email/ident_general/name&quot;}}</td>
</tr>
<tr>
<td>General Contact Email</td>
<td>{{config path=&quot;trans_email/ident_general/email&quot;}}</td>
</tr>
<tr>
<td>Sales Representative Contact Name</td>
<td>{{config path=&quot;trans_email/ident_sales/name&quot;}}</td>
</tr>
<tr>
<td>Sales Representative Contact Email</td>
<td>{{config path=&quot;trans_email/ident_sales/email&quot;}}</td>
</tr>
<tr>
<td>Custom1 Contact Name</td>
<td>{{config path=&quot;trans_email/ident_custom1/name&quot;}}</td>
</tr>
<tr>
<td>Custom1 Contact Email</td>
<td>{{config path=&quot;trans_email/ident_custom1/email&quot;}}</td>
</tr>
</tbody>
</table>
### Store Contact Information Variables (cont.)

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>MARKUP TAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom2 Contact Name</td>
<td>{{config path=&quot;trans_email/ident_custom2/name&quot;}}</td>
</tr>
<tr>
<td>Custom2 Contact Email</td>
<td>{{config path=&quot;trans_email/ident_custom2/email&quot;}}</td>
</tr>
<tr>
<td>Store Name</td>
<td>{{config path=&quot;general/store_information/name&quot;}}</td>
</tr>
<tr>
<td>Store Phone Telephone</td>
<td>{{config path=&quot;general/store_information/phone&quot;}}</td>
</tr>
<tr>
<td>Store Hours</td>
<td>{{config path=&quot;general/store_information/hours&quot;}}</td>
</tr>
<tr>
<td>Country</td>
<td>{{config path=&quot;general/store_information/country_id&quot;}}</td>
</tr>
<tr>
<td>Region/State</td>
<td>{{config path=&quot;general/store_information/region_id&quot;}}</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>{{config path=&quot;general/store_information/postcode&quot;}}</td>
</tr>
<tr>
<td>City</td>
<td>{{config path=&quot;general/store_information/city&quot;}}</td>
</tr>
<tr>
<td>Street Address 1</td>
<td>{{config path=&quot;general/store_information/street_line1&quot;}}</td>
</tr>
<tr>
<td>Street Address 2</td>
<td>{{config path=&quot;general/store_information/street_line2&quot;}}</td>
</tr>
<tr>
<td>Store Contact Address</td>
<td>{{config path=&quot;general/store_information/address&quot;}}</td>
</tr>
</tbody>
</table>
### New Account Template Variables

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>MARKUP TAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Account URL</td>
<td>{{var this.getUrl($store, 'customer/account/')}}</td>
</tr>
<tr>
<td>Customer Email</td>
<td>{{var customer.email}}</td>
</tr>
<tr>
<td>Customer Name</td>
<td>{{var customer.name}}</td>
</tr>
</tbody>
</table>

### New Order Template Variables

<table>
<thead>
<tr>
<th>VARIABLE</th>
<th>MARKUP TAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Address</td>
<td>{{var formattedBillingAddress</td>
</tr>
<tr>
<td>Email Order Note</td>
<td>{{var order.getEmailCustomerNote()}}</td>
</tr>
<tr>
<td>Order ID</td>
<td>{{var order.increment_id}}</td>
</tr>
<tr>
<td>Order Items Grid</td>
<td>{{layout handle=&quot;sales_email_order_items&quot; order=$order area=&quot;frontend&quot;}}</td>
</tr>
<tr>
<td>Payment Details</td>
<td>{{var payment_html</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>{{var formattedShippingAddress</td>
</tr>
<tr>
<td>Shipping Description</td>
<td>{{var order.getShippingDescription()}}</td>
</tr>
</tbody>
</table>
CHAPTER 38:

Social

Your Magento store can be connected to social networks either by using the Magento Social Facebook connector, or by installing a Marketplace extension. In addition, you can easily add social plugins such as the “Like” button to CMS blocks that can be incorporated into pages throughout your store.

- Marketplace Extensions
- Adding Social Plugins
Connect to Facebook

Magento Commerce has removed the "Magento Social" Facebook integration, and no longer supports the extension.

Magento Social is an integration that establishes a connection between your store and your Facebook account, and creates a shopping page with products from your catalog. When shoppers click a product on your Facebook page, they are redirected to the corresponding product page in your Magento store. All transactions take place from your Magento store.
SEO & Search
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.
CHAPTER 39:
Catalog Navigation

The term navigation\(^1\) 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. To learn more about category display options, see: Display Settings.

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.

\(^{1}\)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.

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 root category, 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 top navigation:

See “Creating Categories” to define the category structure of the main menu. For a multistore installation, a different main menu can be assigned as the root category for each store.

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.”

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.
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.
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].
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:

   ![](image)

   **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.
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.

In the **Products per page on List Default Value** field, enter the default number of products that appear in the list, per page.

To give customers the option to list all products, set **Allow All Products on Page** to “Yes.”

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

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>View As</td>
<td>Displays the products in either a grid or list format.</td>
</tr>
<tr>
<td>Sort By</td>
<td>Changes the sort order of the list.</td>
</tr>
<tr>
<td>Show Per Page</td>
<td>Determines how many products appear per page.</td>
</tr>
<tr>
<td>Pagination Links</td>
<td>Navigation links to other pages.</td>
</tr>
</tbody>
</table>
### 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.

![Image of Luma theme displaying Hoodies & Sweatshirts product list](image)

#### View As
Displays the list in either a Grid or List format.

#### Sort By
Changes the sort order of the list. The "Used for Sorting in Product Listing" storefront property determines which product attributes can be used to sort the list.

#### Show Per Page
Determines how many products appear per page.

#### Pagination Links
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 Controls](image)

   **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.
Filterable Attributes

Layered navigation allows customers to search and browse products using facets 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 Swatch Value with No Results
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:

![Product Attributes](image)

**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 should still appear as an available filter. Attribute values with a count of zero (0) product matches are 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. Price layered filtering is not supported by this option, and does not affect Price filters.

b. Set **Use In Search Results Layered Navigation** to “Yes.”

3. Repeat these steps for each attribute that you want to include in layered navigation.

The **Position field** will be grayed out by default. You must save the attribute before you can modify this setting.
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](image)

Step 3: Test the Results

To test the setting, visit 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.

Search, filter, and review the displayed products.
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**

<table>
<thead>
<tr>
<th>PRICE STEP BY 10</th>
<th>PRICE STEP BY 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>$20.00 - $29.99</td>
<td>$0.00 - $99.99</td>
</tr>
<tr>
<td>$30.00 - $39.99</td>
<td>$100 - $199.99</td>
</tr>
<tr>
<td>$70.00 - $79.99</td>
<td>$400.00 - $499.99</td>
</tr>
<tr>
<td>$100.00 - $109.99</td>
<td>$700.00 and above</td>
</tr>
<tr>
<td>$120.00 - $129.99</td>
<td></td>
</tr>
<tr>
<td>$150.00 - $159.99</td>
<td></td>
</tr>
<tr>
<td>$180.00 - $189.99</td>
<td></td>
</tr>
<tr>
<td>$420.00 - $429.99</td>
<td></td>
</tr>
<tr>
<td>$440.00 - $449.99</td>
<td></td>
</tr>
<tr>
<td>$710.00 and above</td>
<td></td>
</tr>
</tbody>
</table>
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.” The change the setting, first clear the Use system value checkbox.
   b. Set Price Navigation Steps Calculation to one of the following methods:

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.

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.
Method 3: Manual

To change the value of any of the following fields, first clear the *Use system value* checkbox.

2. Enter a value to determine the *Default Price Navigation Step*.
3. Enter the *Maximum Number of Price Intervals* allowed, up to 100.

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:

   ![Layered Navigation](image)

   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 40: 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.
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.

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.

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.
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.

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

Magento offers a choice of search engines and versions, and supports both MySQL and Elasticsearch. The search engine configuration includes a set of general settings and additional features specific to the search engine. By default, Magento uses the MySQL search engine.

MySQL

MySQL is the default search engine used by Magento for B2B Commerce.

Elasticsearch

Elasticsearch is a powerful and highly scalable distributed search engine that is used by many industry leaders with high-volume sites.

General Search Options

All search engines include a set of search options.

Search Options

<table>
<thead>
<tr>
<th>OPTION</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimal Query Length</td>
<td>Store View</td>
<td>The minimum number of characters allowed in a catalog search. The value set for this option must be compatible with the corresponding range set in your selected search engine configurations. For example, if you set this value to 2 in Magento, update the value in your search engine.</td>
</tr>
<tr>
<td>Maximum Query Length</td>
<td>Store View</td>
<td>The maximum number of characters allowed in a catalog search. The value set for this option must be compatible with the corresponding range set in your selected search engine configurations. For example, if you set this value to 300 in Magento, update the value in your search engine.</td>
</tr>
<tr>
<td>Number of top search results to cache</td>
<td>Store View</td>
<td>The number of popular search terms and results to cache for faster responses. Entering a value of 0 caches all search terms and results when entered a second time. Default value: 100</td>
</tr>
<tr>
<td>Enable Search Suggestions</td>
<td>Store View</td>
<td>Determines if search suggestions appear for common misspellings. When enabled, search suggestions are offered for any request that returns no results. Search suggestions can impact the performance of search. Options: Yes / No</td>
</tr>
<tr>
<td>OPTION</td>
<td>SCOPE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Search Suggestions Count</td>
<td>Store View</td>
<td>The maximum number of search suggestions offered. Default value: 2</td>
</tr>
<tr>
<td>Show Results Count for Each Suggestion</td>
<td>Store View</td>
<td>Determines if the number of search results is shown for each suggestion. Depending on theme, the number usually appears in brackets after the suggestion. Options: Yes / No</td>
</tr>
<tr>
<td>Enable Search Recommendations</td>
<td>Store View</td>
<td>Determines if search recommendations are offered when a search returns no results. Options include: Yes / No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When set to Yes, additional options display for Search Recommendations Count and Shows Results Count for Each Recommendation.</td>
</tr>
<tr>
<td>Search Recommendations Count</td>
<td>Store View</td>
<td>Specifies the number of search terms offered as recommendations. By default, no more than five are shown.</td>
</tr>
<tr>
<td>Show Results Count for Each Recommendation</td>
<td>Store View</td>
<td>When set to &quot;Yes,&quot; the number of products found for the proposed search recommendation is shown in the brackets. Options: Yes / No</td>
</tr>
</tbody>
</table>
MySQL

MySQL is the default search engine. 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. By default, MySQL always has the EAV Indexer enabled. This feature improves indexation speed and restricts the indexer from use by 3rd party extensions.

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. By default, the Search Engine is set to “MySQL.” If switching to MySQL, select that option. This affects the available fields.
5. To limit the length and word count of search query text, set the Minimal Query Length and Maximum Query Length.

Important: The value set for this minimum and maximum range must be compatible with the corresponding range set in your MySQL search engine configurations. For example, if you set these values to 2 and 300 in Magento, update the values in your search engine.
6. To limit the amount of popular search results to cache for faster responses, set an amount for **Number of top search results to cache**.

The default is 100. Entering a value of 0 caches all search terms and results when entered a second time.

7. To display search suggestions, set **Enable Search Suggestions** to “Yes.” Additional configuration options display.

   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.”

8. To offer search recommendations, set **Enable Search Recommendations** to “Yes.” Additional configuration options display.

   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.”

9. 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 includes both search suggestions and recommendations. For installation instructions, see Set up Elasticsearch service in the developer documentation.

Step 1: Configure Search 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 Catalog Search section.
4. For the Search Engine field, clear the Use system value checkbox and choose the version that is installed on your server.

Elasticsearch  (Deprecated) Elasticsearch 2.0+ has reached end of life, and is now deprecated. To learn more, see Elastic Product End of Life Dates.
Elasticsearch 5.0+ (Default) Elasticsearch 5.0+ is scheduled for end of life. To learn more, see Elastic Product End of Life Dates.
Elasticsearch 6.0+ (Recommended) For the best performance, we recommend that you use the latest version of Elasticsearch 6.0+.

To learn more about using Elasticsearch versions 2.x and 5.x, see Change the Elasticsearch Client.

5. For Enable EAV Indexer, set if you want to enable or disable the Product EAV indexer. This feature improves indexation speed and restricts the indexer from use by 3rd party extensions. This option only displays for Elasticsearch or Elasticsearch 5.0+ Search Engines.
6. To limit the length and word count of search query text, set the Minimal Query Length and Maximum Query Length.

**Important:** The value set for this minimum and maximum range must be compatible with the corresponding range set in your Elasticsearch search engine configurations. For example, if you set these values to 2 and 300 in Magento, update the values in your search engine.

7. To limit the amount of popular search results to cache for faster responses, set an amount for Number of top search results to cache. The default is 100. Entering a value of 0 caches all search terms and results when entered a second time.

**Step 2: Configure the Elasticsearch Connection**

1. Enter the **Elasticsearch Server Hostname**. The default is: localhost.

2. Enter the **Elasticsearch Server Port**.

3. In the **Elasticsearch Index Prefix** field, enter a prefix to identify the Elasticsearch index. For example: Magento2.

4. Set **Enable Elasticsearch HTTP Auth** to “Yes” to use HTTP authentication to prompt for a username and password to access Elasticsearch Server.

5. In the **Elasticsearch Server Timeout** field, enter the number of seconds before the system times out. The default is: 15.

6. 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:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Search Suggestions</td>
<td>Yes</td>
</tr>
<tr>
<td>Search Suggestion Count</td>
<td>2</td>
</tr>
<tr>
<td>Show Results Count for Each Suggestion</td>
<td>No</td>
</tr>
<tr>
<td>Enable Search Recommendations</td>
<td>Yes</td>
</tr>
<tr>
<td>Search Recommendations Count</td>
<td>5</td>
</tr>
<tr>
<td>Show Results Count for Each Recommendation</td>
<td>No</td>
</tr>
</tbody>
</table>

*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**.
CHAPTER 41: 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/
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.
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.

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:
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 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.

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.
2. Tap **New Synonym Group**. Then, do the following:

   ![New Synonym Group](image1)

   **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**.

   ![Search Synonym Group Saved](image2)
CHAPTER 42: 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 for B2B Commerce includes a number of features to support your ongoing SEO effort.

Commerce Resources

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 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.

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 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.

---

![Search Engine Optimization](image)

**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 Site Map

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.

When enabled, Magento creates a file called sitemap.xml that is saved to your installation in the location that you specify. The configuration gives you the ability to set the frequency of the updates, and the priority for each type of content. Your site map 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.

For technical information, see: Add sitemap and robots.txt in the developer documentation.

Process Overview:
Step 1: Configure the Site Map
Step 2: Generate the Site Map
Step 3: Configure and Enable robots.txt (Optional)
Step 4: Submit Your Site Map to Search Engines
Step 5: Restore the Previous Robot Instructions (Optional)

Step 1: Configure the Site Map

Complete the XML Sitemap configuration to determine what is included, and how frequently the site map is updated.
Step 2: Generate the Site Map

1. On the Admin menu, choose Marketing. Then under SEO & Search, choose Site Map.

2. Tap Add Site Map. Then, do the following:

   a. Enter the site map Filename. For example: sitemap.xml

   b. Enter the Path to determine where the site map file is to reside on the server. Make sure that the path is writeable.

      /sitemap/ Places the site map file in a directory called “sitemap.”

      / Places the site map file at the base path, or root of your Magento installation.

3. When complete, tap Save & Generate.

   It might take a few minutes for the site map to appear in the grid.
Step 3: **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 4: **Submit Your Site Map to Search Engines**

You can submit your site map to different search engines by providing them the link to the sitemap.xml file in your Magento installation. To copy the link, do the following:

1. In the Site Map grid, right-click the URL in the **Link for Google** column.

2. On the menu, choose **Copy Link Address**.

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 5: **Restore Previous Robot Instructions** (Optional)

You can now restore either the original, or default restrictions.

**Column Descriptions**

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The sequential record number of the current site map.</td>
</tr>
<tr>
<td>Filename</td>
<td>The file name of the site map.</td>
</tr>
<tr>
<td>Path</td>
<td>The location where the site map resides on the server. For example:</td>
</tr>
<tr>
<td></td>
<td>/sitemap/ Places the site map file in a directory called “sitemap,” one level below the root of the Magento installation.</td>
</tr>
<tr>
<td></td>
<td>/ Places the site map file at the base path, or root of the Magento installation.</td>
</tr>
<tr>
<td>Link for Google</td>
<td>The URL of the site map that is to be submitted to Google and other search engines.</td>
</tr>
<tr>
<td>Last Generated</td>
<td>Indicates the date and time the site map was last generated.</td>
</tr>
<tr>
<td>Store View</td>
<td>The store view where the site map applies.</td>
</tr>
<tr>
<td>Action</td>
<td>Generate Regenerates the site map.</td>
</tr>
</tbody>
</table>
Site Map Configuration

Your site map 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.
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
6. Click to expand the **CMS Pages Options** section. Then, complete the **Frequency** and **Priority** settings as needed.

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

**Step 2: Complete the Generation Settings**

1. Expand the **Generation Settings** section.

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 Site Map 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](image)

2. **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](image)

   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: |

Disallow 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= |

To configure robots.txt:

1. On the Admin sidebar, tap Content. Then under Design, choose Configuration.
2. Find the Global configuration in the first row of the grid, and click Edit.
3. Scroll down and expand the **Search Engine Robots** section. Then, do the following:

   **Search Engine Robots**

   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 Configuration**.
CHAPTER 43: 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.
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


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.

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.

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.
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
```
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](image)

**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.

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.
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.

---

**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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| 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 product that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and category.  
                          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. |
| 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               | Determines the type of redirect. Options:  
                          No  
                          No redirect is specified.  
                          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.  
                          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. |
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]

   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](image)

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](image)
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| 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 category that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and parent category.  
|                  | 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. |
| 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         | Determines the type of redirect. Options:  
|                  | No  
|                  | No redirect is specified. 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. |
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temporary (302)</td>
<td>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</td>
</tr>
<tr>
<td>Permanent (301)</td>
<td>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</td>
</tr>
<tr>
<td>Description</td>
<td>Describes the purpose of the rewrite for internal reference.</td>
</tr>
</tbody>
</table>
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](image)

**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.

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 one of the following:
Creating URL Rewrites

CHAPTER 43: URL Rewrites

- Temporary (302)
- Permanent (301)

d. For your reference, enter a brief description of the rewrite.

![Custom URL Rewrite](image)

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.

![Saved URL Rewrite](image)
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create URL Rewrite</td>
<td>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom, For category, For product, For CMS page</td>
</tr>
<tr>
<td>Request Path</td>
<td>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.</td>
</tr>
<tr>
<td>Target Path</td>
<td>The internal path that is used by the system to point to the destination. The target path is grayed out and cannot be edited.</td>
</tr>
<tr>
<td>Redirect</td>
<td>Determines the type of redirect. Options: 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.</td>
</tr>
<tr>
<td>Description</td>
<td>Describes the purpose of the rewrite for internal reference.</td>
</tr>
</tbody>
</table>
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 one of the following:
      - Temporary (302)
      - Permanent (301)

   e. For your reference, enter a brief description of the rewrite.
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.

When complete, tap **Save**.

The new rewrite appears in the grid at the top of the list.

**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**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create URL Rewrite</strong></td>
<td>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page</td>
</tr>
<tr>
<td><strong>Request Path</strong></td>
<td>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. 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.</td>
</tr>
<tr>
<td><strong>Target Path</strong></td>
<td>The path or URL that is the destination of the redirect.</td>
</tr>
</tbody>
</table>
| **Redirect**           | Determines the type of redirect. Options:
  - No: No redirect is specified. 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.
  - 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. |
CHAPTER 44:  
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 Content Experiments
- Google Tag Manager
- Google AdWords
Google Analytics

Google Universal 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.

Google Analytics

Process Overview:
Step 1: Sign Up for Google Universal Analytics
Step 2: Complete the Magento Configuration

Step 1: Sign Up for Google Universal Analytics

Visit the Google website, and sign up for a Google Universal 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. Enter your Google Analytics Account Number.
   c. 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 Content Experiments
The following example shows how to set up an A/B test of products, categories, or content pages using Google Analytics Content Experiments. We recommend that you keep two browser tabs open while working through the instructions, because you will need to bounce back and forth between the Magento Admin and your Google Analytics account.

Google Content Experiments has been deprecated, and will eventually be replaced by Google Optimize.

**Step 1: Enable Content Experiments** (Magento)

1. Log in to the Admin of your Magento installation.
2. Follow the instructions to enable Google Analytics with Content Experiments in the Magento configuration.

![Enable Content Experiments](image)

**Step 2: Set Up the Variations** (Magento)

Create multiple variations of the same product, category, or page.

- Each variation must have a unique URL key.
- Each variation must have the same store view selected.

You can create up to ten variations of each entity that you want to test. For products, use Save & Duplicate to save time.

**Step 3: Set Up the Experiment** (Google)

You must have the appropriate permissions to the Google account to create an experiment.

1. Open another browser tab, and log into your Google Analytics account. If necessary, navigate to the Account and Property.
2. In the sidebar on the left, choose Admin. Then, do one of the following:
Choose an Existing View

In the header of the View column, click the down arrow, and choose the view that is to provide the data for the experiment.

Create a New Reporting View

1. In the header of the View column, tap Create View. Then, do the following:
   a. Identify the experiment location as one of the following:
      • Website
      • Mobile app
   b. Enter a descriptive Reporting View Name.
   c. Specify the Reporting Time Zone.
2. When complete, tap Create View. Then, click the back arrow to return to the previous page.

3. In the panel on the left under Reports, choose Behavior > Experiments.
4. Tap Create experiment. Then, do the following:
   a. Specify the percentage of traffic to redirect.
   b. Specify the Original Page URL and the URLs of each page variation that you want to test.
   c. Complete the other options. If you need help see: Configure & Modify Experiments.
5. When the experiment is set up, tap Manually Insert the Code. Then, copy the code snippet.
Step 4: **Paste Code Snippet** (Magento)

1. Return to the Admin of your Magento installation. Then, open the original version of the product, category, or page in edit mode.

2. Expand the **View Optimization** section for the product, category, or page. Then, paste the code snippet that you copied from Google Analytics into the **Experiment Code** text box.

   Do not paste the code snippet into any of the variations.

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

**Step 5: Review and Start the Experiment** (Google)

1. Return to your **Google Analytics** account.

2. Review the experiment settings.

3. If ready to begin, tap **Start Experiment**. Otherwise, tap **Save for Later**.
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.

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.

You should have a Google Analytics and Tag Manager account to continue this process. The following instructions walk you through the process of configuring your Google accounts, configuring your Magento store, and creating a tag.

To set up and prepare your Google accounts, see the Google guides for Google Analytics and Google Tag Manager guide.

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

For additional information, see Google's Set up Site Search. These instructions provide the basics to get started.

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, importing to generate a tag in a new container. For this example, we recommend that you create a new container, rather than modify an existing container.

For additional information, see Google’s **Container export and import**. These instructions walk-through importing a sample JSON to a new container.

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 uploaded directly to Google Tag Manager, and does not need to be copied to your server.

2. **Navigate to Admin > Container > Import Container**.

3. **Tap Choose container file** and select the json file.

4. **Under Choose workspace**, tap **New**. Enter a title and description, then tap **Save**.

5. Select one of the following actions to import the file:

   - The **Overwrite** option should be selected for the new container.
   - The **Merge** option should be selected if you are using an existing container.

6. **Tap Preview** to review the tags, triggers, and variables.

7. 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.

8. 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.

9. Tap Confirm when complete. 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 configure:

   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. Use the default values for the remaining fields.
5. When complete, tap **Save Config**.

6. Test your Google Tag Manager settings to verify that everything works correctly.
## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Store View</td>
<td>Determines if Google Analytics Enhanced Ecommerce can be used to analyze activity in your store. Options include: Yes / No</td>
</tr>
<tr>
<td>Account type</td>
<td>Store View</td>
<td>Determines the Google tracking code that is used to monitor store activity and traffic. Options include: Google Analytics, Google Tag Manager</td>
</tr>
<tr>
<td>Anonymize IP</td>
<td>Store View</td>
<td>Determines if identifying information is removed from IP addresses that appear in Google Analytics results.</td>
</tr>
<tr>
<td>Enable Content Experiments</td>
<td>Store View</td>
<td>Activates <a href="https://developers.google.com/analytics/devguides/collection/content-experiments">Google Content Experiments</a>, which can be used to test up to ten different versions of the same page. Options: Yes / No</td>
</tr>
<tr>
<td>Container Id</td>
<td>Store View</td>
<td>If Google Tag manager is already installed and configured for your store, the Container ID appears automatically in this field.</td>
</tr>
<tr>
<td>List property for the catalog page</td>
<td>Store View</td>
<td>Identifies the Tag Manager property associated with the catalog page. Default value: Catalog Page</td>
</tr>
<tr>
<td>List property for the cross-sell block</td>
<td>Store View</td>
<td>Identifies the Tag Manager property associated with the cross-sell block. Default value: Cross-sell</td>
</tr>
<tr>
<td>List property for the up-sell block</td>
<td>Store View</td>
<td>Identifies the Tag Manager property associated with the up-sell block. Default value: Up-sell</td>
</tr>
<tr>
<td>List property for the related products block</td>
<td>Store View</td>
<td>Identifies the Tag Manager property associated with the related products block. Default value: Related Products</td>
</tr>
<tr>
<td>List property for the search results page</td>
<td>Store View</td>
<td>Identifies the Tag Manager property associated with the search results page. Default value: Search Results</td>
</tr>
<tr>
<td>“Internal Promotions” for promotions field “Label”</td>
<td>Store View</td>
<td>Identifies the Tag Manager property associated with the labels for internal promotions. Default value: Label</td>
</tr>
</tbody>
</table>
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](image)

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**.
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**.

![Google Tag Manager](image)

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.*

![Google Tag Manager](image)

*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**.
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 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.

**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

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENABLE ECOMMERCE SETTINGS</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>ON</td>
</tr>
<tr>
<td>Related Products</td>
<td>ON</td>
</tr>
<tr>
<td>ENHANCED ECOMMERCE SETTINGS</td>
<td></td>
</tr>
<tr>
<td>Enable Enhanced Ecommerce Reporting</td>
<td>ON</td>
</tr>
<tr>
<td>Checkout Labeling</td>
<td>(not required)</td>
</tr>
</tbody>
</table>

3. When complete, tap **Submit**.
**Step 3: Create Tags and Triggers**

1. Sign in to your Google Tag Manager account, and create the following triggers:

### Google Tag Manager Triggers

<table>
<thead>
<tr>
<th>NAME</th>
<th>EVENT TYPE</th>
<th>FILTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>AddToCart</td>
<td>Custom Event</td>
<td></td>
</tr>
<tr>
<td>Checkout</td>
<td>Custom Event</td>
<td></td>
</tr>
<tr>
<td>Checkout only</td>
<td>Page View</td>
<td>Page URL matches RegEx /checkout/.*</td>
</tr>
<tr>
<td>CheckoutOption</td>
<td>Custom Event</td>
<td></td>
</tr>
<tr>
<td>gtm.dom</td>
<td>Custom Event</td>
<td></td>
</tr>
<tr>
<td>ProductClick</td>
<td>Custom Event</td>
<td></td>
</tr>
<tr>
<td>PromotionClick</td>
<td>Custom Event</td>
<td></td>
</tr>
<tr>
<td>RemoveFromCart</td>
<td>Custom Event</td>
<td></td>
</tr>
</tbody>
</table>

2. Create the following Universal Analytics tags with the same **basic configuration**.

### Universal Analytics Tags

<table>
<thead>
<tr>
<th>NAME</th>
<th>TYPE</th>
<th>FIRING TRIGGERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to cart tracking</td>
<td>Universal Analytics</td>
<td>AddToCart</td>
</tr>
<tr>
<td>Checkout option tracking</td>
<td>Universal Analytics</td>
<td>CheckoutOption</td>
</tr>
<tr>
<td>Checkout tracking</td>
<td>Universal Analytics</td>
<td>Checkout</td>
</tr>
<tr>
<td>Pageview tracking</td>
<td>Universal Analytics</td>
<td>gtm.dom</td>
</tr>
<tr>
<td>Product client tracking</td>
<td>Universal Analytics</td>
<td>ProductClick</td>
</tr>
<tr>
<td>Promo click tracking</td>
<td>Universal Analytics</td>
<td>PromotionClick</td>
</tr>
<tr>
<td>Remove from cart tracking</td>
<td>Universal Analytics</td>
<td>RemoveFromCart</td>
</tr>
</tbody>
</table>
Basic Tag Configuration

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Google Analytics</td>
</tr>
<tr>
<td>Tag Type</td>
<td>Universal Analytics</td>
</tr>
<tr>
<td>Tracking ID</td>
<td>UA-XXX (The tracking ID from your Universal Analytics account.)</td>
</tr>
<tr>
<td>Enable Enhanced Ecommerce Features</td>
<td>True</td>
</tr>
<tr>
<td>Use data layer</td>
<td>True</td>
</tr>
<tr>
<td>Use Debug version</td>
<td>True</td>
</tr>
</tbody>
</table>

3. Complete the individual tracking configurations as follows:
   a. Enter the following Add to Cart tracking settings:

   Add to Cart Configuration

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Type</td>
<td>Event</td>
</tr>
<tr>
<td>Category</td>
<td>Ecommerce</td>
</tr>
<tr>
<td>Action</td>
<td>Add to Cart</td>
</tr>
<tr>
<td>Trigger</td>
<td>AddToCart</td>
</tr>
</tbody>
</table>

   b. Enter the following Checkout option tracking settings:

   Checkout Option Configuration

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Type</td>
<td>Event</td>
</tr>
<tr>
<td>Category</td>
<td>Ecommerce</td>
</tr>
<tr>
<td>Action</td>
<td>Checkout Option</td>
</tr>
<tr>
<td>Trigger</td>
<td>CheckoutOption</td>
</tr>
</tbody>
</table>

   c. Enter the following PageView tracking settings:

   Page View Configuration

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Type</td>
<td>PageView</td>
</tr>
<tr>
<td>Trigger</td>
<td>gtm.dom</td>
</tr>
</tbody>
</table>
d. Complete the following **Product Click** tracking configuration:

**Product Click Configuration**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Type</td>
<td>Event</td>
</tr>
<tr>
<td>Category</td>
<td>Ecommerce</td>
</tr>
<tr>
<td>Action</td>
<td>Product Click</td>
</tr>
<tr>
<td>Trigger</td>
<td>ProductClick</td>
</tr>
</tbody>
</table>

e. Complete the following **Promotion Click** tracking configuration:

**Promotion Click Configuration**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Type</td>
<td>Event</td>
</tr>
<tr>
<td>Category</td>
<td>Ecommerce</td>
</tr>
<tr>
<td>Action</td>
<td>Promotion Click</td>
</tr>
<tr>
<td>Trigger</td>
<td>PromotionClick</td>
</tr>
</tbody>
</table>

f. Complete the following **Remove from Cart** tracking configuration:

**Remove from Cart Configuration**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track Type</td>
<td>Event</td>
</tr>
<tr>
<td>Category</td>
<td>Ecommerce</td>
</tr>
<tr>
<td>Action</td>
<td>Remove from Cart</td>
</tr>
<tr>
<td>Trigger</td>
<td>RemoveFromCart</td>
</tr>
</tbody>
</table>

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.
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.

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 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 for 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.
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: MlEYCOKBnGoQz6CZoAM

**Sample Google AdWords Tag Code**

```html
<!-- Google Code for Back to School Sale Conversion Page -->
<script type="text/javascript">
/* <![CDATA[ */
var google_conversion_id = 999999999;
var google_conversion_language = "en";
var google_conversion_format = "3";
var google_conversion_color = "ffffff";
var google_conversion_label = "MlEYCOKBnGoQz6CZoAM";
var google_remarketing_only = false;
/* ]]> */
</script>
<script type="text/javascript" src="//www.googleadservices.com/pagead/conversion.js">
</script>
<noscript>
<div style="display:inline;">  
</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.
CHANNELS
In this section of the guide, you’ll learn how Magento advertising channels can simplify and centralize your ad campaign management and sales channels can integrate your product catalog, orders, shipments, and store configurations. These powerful features empower you to increase revenue by capturing new storefront traffic and expanding sales to additional webstores.
CHAPTER 45: Google Shopping ads Channel

Simplify your Google promotions and ad campaign management by integrating your Magento catalog with Google through Magento’s Google Shopping ads. This extension syncs your Magento product catalog and other information with your Google Merchant Center (GMC) and Ads accounts to promote and sell products. When you have integrated your Magento catalog, you can manage your GMC catalog and publish Google Smart Shopping ads campaigns directly from Magento.

This guide provides insights to Google accounts, onboarding, managing your catalog, and developing campaigns. See the following sections to install, onboard, and start selling with Google.

Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

Getting Started with Google Shopping ads Channel

Google Shopping ads Channel integrates Google Merchant Center, Google Ads, and your Magento catalog to advertise and sell products. Learn more about installing the extension, FAQs, terms, workflows, best practices, and more.

Onboarding Google Shopping

Set up and configure all accounts and integrate with Google following the onboarding process. The process walks through creating all accounts, syncing products, and creating your first Smart Shopping ad campaign.
Managing Google Accounts

Review and manage your Google account errors and settings. You must resolve any account issues to create and sell through campaigns.

Managing Google Products

Review and manage synced products with Google. All synced products save to a Google product catalog with a status of approved or disapproved. Products must be approved to display in ads.

Managing Ad Campaigns

Magento supports only Google Smart Shopping campaigns, allowing you to create and manage campaigns directly through the Admin.

Getting Started with Google Shopping ads Channel

Google Shopping ads empowers you to expand business and revenue by capturing traffic that actively sees products through searches. As Google provides search results, any products you promote through Smart Shopping Ads also display to corner markets and drive sales. Customers enter your storefront by clicking on product listings including images, names, prices, and more.

To simplify creating and managing products and campaigns with Google, you just need to understand the following concepts and complete a few onboarding steps. This section helps you get started quickly.
About GMC and Ads with Magento

Learn more about Google Merchant Center and Google Ads accounts, products, campaigns, and more. These are the key accounts used to integrate Magento and Google.

About Google and Magento Attributes

Learn more about Magento and Google product catalogs, product reviews, approvals, disapprovals, and more.

Best Practices for Google Shopping ads Channel

Find out the best practices, tips, tricks, and recommendations for all aspects of Magento and Google integration settings, product catalogs, campaigns and much more.

About GMC and Ads with Magento

The Google Shopping ads integration leverages Google Merchant Center (GMC) and Google Ads accounts with your Magento product catalog. Learn more about these accounts, how they work, and the integrations with Magento. We simplify the entire process for syncing product data, creating ads, and managing everything through a single integration. For more information, also look through the Google Shopping FAQs and Best Practices for Google Integrations.

Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

Google Merchant Center

The GMC is a platform to import and manage product data with Google, capable of integrating with Google Ads. To advertise and sell through Google you must complete a series of steps. Magento resolves these complicated steps with an onboarding process and management tools within the Magento Admin.
Onboard in a single process to import and map product data with Google attributes to best match product searches and advertisements to conditions, age groups, product types, and more.

- Review and manage Google approvals for products and accounts
- Manage products including disapprovals, prices, promotions, updates, and more

**Catalogs and Syncing**

Google Shopping ads Channel leverages your Magento product catalog, syncing product data and configured attributes directly with Google. We take the guesswork out of mapping to Google attributes, allowing you to select from existing attributes, using Google attributes, or adding new Magento attributes for various categories including product type, condition, age group, gender, and more.

Syncing at regular intervals each day, Magento checks for any issues with your account and products, listing disapprovals and reasons through the dashboard. Click, review, and update required product data changes to kick off Google reviews for new approvals. As you make changes to product data, quantities, and prices, we sync those updates to Google on save. Updates should display on Google within an hour of saving in Magento.

By default, your GMC account can support 150,000 total line items in your product feed and countries. For example, if you sell and promote a product across three countries, the total number counts against your total. If you exceed this quota, you will receive an account error of too many products. Magento cannot extend or affect this quota. To increase your limit, contact Google with this form.

You only need to access GMC for advanced configurations including shipping and taxes. Manage all products, settings, and reports through the Magento Admin.

**Terms and Concepts**

- **Claim** and **Verify**: Google must verify and claim your storefront URL to associate it to your GMC account. **Verifying** adds markers to your site for Google to locate and confirm that you are the authorized owner of both your website and your Merchant Center account. **Claiming** reserves the URL you verified for use with your Merchant Center account. URL status includes "Claimed and Verified" and "Unclaimed".

- **Approval** and **Disapproval**: Google marks products as approved if they pass all **product** and policy requirements. Products have the **Pending Approval** status until reviewed. Disapproved products have an issue that must be resolved and submitted for another review. Approved products can be searched and displayed through Google.

- **Attributes**: Google uses attributes as a form of mapping imported Magento product data. Magento attributes can be mapped to these Google attributes to ensure Google properly uses your product data. For details on attributes, see Google's **Product data specification**. If you select to create a new attribute during the onboarding process, it is named Google Merchant Center Category.
Google Ads

Google Ads provides an online advertising program to sell your products through Google. The account and tools support multiple types of ads to target networks, keywords, and search results with the best matching products. Magento Google Shopping ads Channel supports only a Smart Shopping Ads campaigns, integrating your GMC products with advanced Google systems to create and test different product asset and information combinations as relevant ads across Google networks. The system tracks performance of ads based on responses and click-throughs, regulating your advertisements per an allocated daily budget.

Simplify your ad campaign management, increase your sales, and expand your reach with Smart Shopping campaigns. Smart Shopping campaigns combine elements of your existing product feed and assets with Google’s machine learning to show a variety of ads across different ad networks. Networks include the Google Search Network, the Google Display Network, YouTube, and Gmail. Smart Shopping campaigns feature both Product Shopping ads and display ads (including Remarketing Ads and Similar Audiences).

Smart Shopping campaigns

Smart Shopping campaigns are easy to use. Simply link to a GMC account, set a budget, confirm the country of sale, and select products. Google systems use your approved products and test different combinations of product image and text, then show the most relevant ads across Google networks. To help you get the best value from each ad, Google automates ad creation, ad placement, and bidding to maximize sales at your given budget.

Smart Shopping campaigns provide the following key benefits:

- Aligned to your marketing objective by focusing on increasing sales for your budget.
- Improve cost efficiency by fully automating bidding so you can focus more time on strategic tasks.
- Cross-channel optimization that ensure your budget is spent optimally across the Google Search Network, Display networks, and YouTube

Magento supports creation and management of Smart Shopping campaigns. Easily create and manage your Smart Shopping campaigns directly through the Magento Admin:

- Advertise across the globe by selecting countries from the list. Google displays ads for those locations, displaying translated product data if those locales are configured and translated in your catalog.
- Set a daily budget to define an average amount for advertising spending per campaign
- Select all products or a filtered group to display in ads. As products sync and approve with GMC, they also display as part of the campaign if they match the parameters.
- Track ad performance, costs, conversions, and status through the dashboard
- Create, pause, and end campaigns without scheduling. Manually create, pause, and end campaigns as needed.

You only need to access Google Ads to configure your payment method. Access and review all ads, settings, and reports through the Magento Admin.

Terms and Concepts
- **Shopping Ads**: An ad displaying your rich merchant data including product name, image, link, description, price, and more.
- **Campaign**: Method of managing and customizing ads. Magento supports Smart Shopping campaigns.
- **Timezone**: Setting for your Ads account that determines the timezone for Google reporting.
- **Currency**: Setting for your Ads account that determines the currency used to set budgets for your ads and shows in reporting.
- **Budgets**: Your ad campaigns have a daily budget that sets the average maximum amount you want spend for displaying and promoting the Smart Ads per day. Google has intelligent tracking and algorithms to evaluate the popularity of your products, ad displays and click-throughs, and much more. If an ad is popular with significant click-throughs, Google may promote the ad more, possible spending more of your budget. The amounts balance, never exceeding your average, and rolling over amounts not spent from one day to the next.
- **Status:** The status indicates if your campaign is running ads, is available, or ended. Google supports a number of ad status options. Magento supports a specific set: Active (ads able to run), Paused, Ended (no longer running).

- **Launch Date:** The date the campaign was submitted and started in Magento. When ended, the date clears.

### All Ad Campaigns

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th>GMC ID</th>
<th>Products</th>
<th>Daily Budget</th>
<th>Cost</th>
<th>Clicks</th>
<th>Conversions</th>
<th>Conversion Value</th>
<th>Launch Date</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer Fashion</td>
<td>794356</td>
<td>864</td>
<td>$0.00</td>
<td>$1.00</td>
<td>17</td>
<td>16</td>
<td>$0.00</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
</tr>
<tr>
<td>Discount All</td>
<td>675</td>
<td>91580</td>
<td>$254</td>
<td>111</td>
<td>53</td>
<td>$975</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
<td></td>
</tr>
<tr>
<td>Halloween Promo</td>
<td>796784</td>
<td>56</td>
<td>$250</td>
<td>$1.07</td>
<td>142</td>
<td>2</td>
<td>$0.00</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
</tr>
<tr>
<td>Halloween Sale</td>
<td>587618</td>
<td>75</td>
<td>$150</td>
<td>$118</td>
<td>313</td>
<td>67</td>
<td>$0.00</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
</tr>
<tr>
<td>Winter Dresses</td>
<td>577044</td>
<td>22</td>
<td>$350</td>
<td>$94</td>
<td>45</td>
<td>24</td>
<td>$1.00</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
</tr>
<tr>
<td>Winter Coats</td>
<td>587036</td>
<td>1558</td>
<td>$129</td>
<td>$158</td>
<td>622</td>
<td>19</td>
<td>$0.00</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
</tr>
<tr>
<td>Outdoor Sale</td>
<td>572586</td>
<td>84</td>
<td>$600</td>
<td>$0.00</td>
<td>12</td>
<td>31</td>
<td>$0.00</td>
<td>07/02/2018</td>
<td>Paused</td>
<td>Select</td>
</tr>
<tr>
<td>Summer Sale</td>
<td>514514</td>
<td>27</td>
<td>$720</td>
<td>$420</td>
<td>10</td>
<td>21</td>
<td>$0.00</td>
<td>07/02/2018</td>
<td>Active</td>
<td>Select</td>
</tr>
</tbody>
</table>

**Google Ads campaign tracking in Google Shopping ads Channel**

### Onboarding Process

We provide an onboarding process, walking you through the steps to create and configure accounts much like a wizard. Each screen will prompt you for specific information with helpful tips. For complete details, see the Onboarding Google Shopping ads. After you complete onboarding, continue managing your account and products during the approval process. The Google Shopping ads dashboard and details pages keep you informed with options to review and resolve issues as notified by Google.

### Google Approval Process

When you complete the onboarding step for the GMC account, Google begins receiving and reviewing your products. These reviews verify your product data according to Google guidelines, and against your storefront posted products. The review requires passing Google product and policy requirements.

For details, see About Google and Magento Catalogs.

### About Google and Magento Attributes
Your Magento catalog includes all products and associated settings (images, options, prices, and more) that populate and sell through your storefront(s). The integration with Google Shopping ads Channel pushes your entire Magento catalog to GMC. Use filters to set the products for ads.

The integration supports all Magento product types excluding gift cards, grouped products, and simple products with required options. Google also recommends not selling products requiring customization or personalization.

⚠️ Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

Google Shopping ads Channel Dashboard

The dashboard provides detailed lists of your GMC accounts, Google Ads, and options to add more accounts and campaigns. Control your accounts, products, and campaigns from one screen.

If you have additional steps to complete, banners display with information and next steps. See each section to review and manage your GMC account, product updates, and campaign status.

Google Shopping ads Channel Dashboard
Mapping Product Data

When you complete the onboarding process to add Google Merchant Center and Ads accounts, you map Google attributes with your Magento catalog attributes. The mappings help provide data from your Magento products into a synced Google product catalog.

If you do not have custom Magento attributes, you may add Magento attributes and values or select the best matching Google attributes. Any Google values selected and configured do not save back into your Magento catalog.

<table>
<thead>
<tr>
<th>GOOGLE ATTRIBUTE</th>
<th>MAGENTO ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Product Name</td>
<td>The name of your product.</td>
</tr>
<tr>
<td></td>
<td>(default)</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Description</td>
<td>The full Description block for your product.</td>
</tr>
<tr>
<td></td>
<td>(default)</td>
<td></td>
</tr>
<tr>
<td>Google Product Category</td>
<td>Custom attribute</td>
<td>Google supports a product category for each product. Categorizing your product helps ensure that your ad is shown with the right search results. If you do not use category attributes in Magento, select the best matching Google category.</td>
</tr>
<tr>
<td>Product condition</td>
<td>Custom attribute</td>
<td>Attribute(s) specifying conditions such as new, used, repaired, refurbished, mint, like new, etc. Google only recognizes New, Used, and Refurbished. If all of your products have one product condition, select a Google attribute best matching that condition (like New). Or map your Magento condition attribute values to Google attributes.</td>
</tr>
<tr>
<td>GTIN</td>
<td>Custom attribute</td>
<td>This is the Global Trade Item Number typically assigned by manufacturers to a product. Depending on your product, you may receive a different type of GTIN including UPC, EAN, JAN, ISBN, or ITF-14. To find your GTIN, see Google's Find a GTIN. For this option, select the type of GTIN or none if you do not have an assigned value. If you do not have a GTIN, you may have an MPN.</td>
</tr>
</tbody>
</table>

APPAREL AND ACCESSORIES ATTRIBUTES
ADULT-ONLY CONTENT ATTRIBUTES
PRICES (AUTOMATICALLY SUPPLIED BY SYSTEM)
<table>
<thead>
<tr>
<th>GOOGLE ATTRIBUTE</th>
<th>MAGENTO ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>MPN</td>
<td>Custom attribute</td>
<td>This is the Manufacturer Part Number typically assigned if your product does not have a GTIN. For details, see Google's mpn: Definition. If your products do not have a MPN, select none.</td>
</tr>
<tr>
<td>Manufacturer Path Number</td>
<td>Custom attribute</td>
<td>The specific brand of your products. If you sell products manufactured by other companies, you may have assigned the brand for categories, searches, and layered navigation. Google requires this attribute for all new products except those in these categories: movies, books, musical recording labels, custom and custom-made items such as t-shirts and novelty products. For examples and best practices, see Google's brand: Definition.</td>
</tr>
<tr>
<td>Brand</td>
<td>Custom attribute</td>
<td>Attribute(s) that identify any new products without a gtin and brand or mpn and brand. For details, see Google's identifier_exists: Definition.</td>
</tr>
</tbody>
</table>

**APPAREL AND ACCESSORIES ATTRIBUTES**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>Attribute(s) specifying age groups, such as kids, adults, etc. Google recognizes the following age groups: Newborn, Infant, Toddler, Kids, and Adults. For details, see Google's age_group: Definition.</td>
</tr>
<tr>
<td>Gender</td>
<td>Attribute(s) specifying gender for products. Google recognizes unisex, male, and female. For details, see Google's gender: Definition.</td>
</tr>
<tr>
<td>Color</td>
<td>Attribute(s) specifying colors for products. Some catalogs use attributes with swatches to specify colors. Google supports solid colors like red, white, blue, green, yellow, etc. For details, see Google's color: Definition.</td>
</tr>
<tr>
<td>Size</td>
<td>Attribute(s) specifying sizes either in text (large, medium, small) or numerical (10, 9.5, 9). Depending</td>
</tr>
</tbody>
</table>

**ADULT-ONLY CONTENT ATTRIBUTES**

**PRICES (AUTOMATICALLY SUPPLIED BY SYSTEM)**
on your products, these sizes can differ or include both text and number. For details, see Google's size: Definition.

ADULT-ONLY CONTENT ATTRIBUTES

on your products, these sizes can differ or include both text and number. For details, see Google's adult: Definition and policies on Adult-oriented content.

PRICES (AUTOMATICALLY SUPPLIED BY SYSTEM)

on your products, these sizes can differ or include both text and number. For details, see Google's

Sales Price Final Price

The final price calculated in the Magento catalog including discounts. Due to complex nature of Magento pricing, we use this price to map to Google Sales Price. This value is automatically supplied from Magento to Google.

Syncing Products to Google

Your product data syncs from your Magento product catalog into the Google product catalog during onboarding and as you save product updates.

- All attributes map and set the data Google saves into its catalog and displays in ads.
- Google allows you to sync and sell up to 150,000 total line items in your product feed and countries. For example, if you sell and promote a product across three countries, the total number counts against your total. If you attempt to sell more than 150,000 unique products, Google will disable and reduce the number of active products available. To increase your limit, contact Google with this form.
- While products are waiting to be approved, they have a Pending Approval status.
- The initial push of data to Google completes in waves, mapping and collecting for review. The process of validation and approval takes much more time. The complete process of product data and review can take up to 10 days to complete for larger product catalogs.
After products are received and approved in your Google product catalog, any updates in mapped attributes, quantity, price, and availability (in-stock/out-of-stock) are received and posted within an hour. Every save of product data in the Magento Admin is collected and synced to Google using a cron job (added as part of the extension).

If you save price changes to products, or remove products, Magento immediately sends those updates to Google. You should see the updated prices and removals within an hour after saving changes. This is separate from product approval status checks with Google.

For details, see Google's About ads approval process and Promotion approval process.

**Disapprovals and Errors**

If a product returns with a disapproval, Magento provides an easy to access list of issues and associated products to revise and have reviewed again. You must resolve the issues for Google to review and approve your products. This process runs every time you update and save a product or add a new product matching the sync settings for the GMC.

- For product data requirements, see Google's Product data specification and our best practices.
- For more information on disapprovals, see Google's About item and account disapprovals for product data violations and About item disapprovals for policy violations.
- To review and resolve disapprovals, see Managing Google Products and Managing Google Accounts.

![Magento Google Shopping - Product and Account Error Tracking](image)

**Best Practices for Google**
Helpful tips, tricks, and important information for your Google Shopping ads integration, Google Merchant Center (GMC), Google Ads, and more.

Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

Account Onboarding and Configurations
Use these helpful tips when completing Google onboarding.

- Turn off pop-up blockers in your web browser. Some browsers may include pop-up blockers by default (like Chrome). You cannot complete onboarding with pop-up blockers enabled. Login screens open to Google using pop-up windows.
- Always check back on your Account and Product Errors to resolve issues. Magento performs some validation immediately, listing products that are missing information required by Google before review. Google performs revolving checks on your product updates to complete reviews for corrected and added products.
- After onboarding completes, we check for product approval and account status with Google every 30 minutes for the first 10 days of your integration. Google may require up to 72 hours to review all products submitted in your onboarding process. After the first 72 hours, Magento checks product and account status once every hour.
- For complex shipping and tax settings, you have an option to configure these settings in Google after account creation. Select that option and access your GMC account later to update. You must complete these Google configurations for products approvals.
- We recommend overestimating tax and shipping amounts if you cannot provide an exact match for costs. Google performs routine checks for merchant listed taxes and shipping costs, verifying the amounts best match actual calculations from your storefront. If the Google defined amounts are lower than your actual costs, Google may disapprove of the products and/or account.
- Your account may encounter errors and issues due to violations. For more information on account issues and suspensions, see Google's Understanding account suspension for policy violations.
- Review and resolve your account errors quickly as possible. Your GMC account must be approved to continue and complete product approvals and campaigns. If your account is in error, all approvals are placed on hold and campaigns stop running.
Product Management

- If you exceed your Google quota (default is 150,000) for total synced line items (all items in your product feed for all countries), you will receive an account error of too many products. For example, if you sell and promote a product across three countries, the total number counts against your total. Magento cannot extend or affect this quota. To increase your limit, contact Google with this form.

- Check for and remove excessive numbers of invalid products to keep your synced product amounts within your allocated quota.

- Consider adding product expiration dates to cycle through products on Google and stay within your allocated quota. When the expiration is reached, the product automatically deletes from Google. The default and maximum expiration date is 30 days after product addition or update to Google.

- If you save price changes to products, or remove products, Magento immediately sends those updates to Google. You should see the updated prices and removals within an hour after saving changes. This is separate from product approval status checks with Google.

- Ensure your products prices and availability (in or out of stock) match between your online storefront and GMC account. The quantity can differ and does not affect approval. Google uses the Magento Regular Price and Special Price. See Google's Troubleshooter: Preemptive product disapproval (price and availability).

- Consider not selling products that require personalization or customization during checkout. See Google's Troubleshooter: Personalized goods.

- Determine if your products require a GTIN or Unique Product Identifier using Google's decision form.

Campaigns

- Smart Shopping Campaigns have a learning period of two weeks for the Google AI to optimize performance of your ads. Every time you edit and modify a campaign's budget or assigned products, Google requires another two week re-learning period.

- If you have submitted product data for the first time or significantly updated existing data in your GMC account, Google may take up to two business days to review the new data. As a result, products in your campaigns may take time to also update.

- Only approved products in your GMC account are eligible to run in ads.

- To better understand Google Ads issues, see Google's Fix issues with a Shopping campaign.

- Plan your campaigns and keep track through the Google Shopping ads dashboard. All campaigns are manually created and ended through the Magento Admin. Magento does not support scheduled campaigns at this time.
You can create many campaigns to prepare for different seasons and promotions, pausing them until ready to cycle the campaigns.

Google serves and runs ads in all languages you configured when claiming and verifying your URL. This may increase your costs for running ads.

**Onboarding Google Shopping ads Channel**

This guide walks you through the entire onboarding process of setting up your accounts including Magento web account, Google Merchant Center (GMC) account, and Google Ads account. With your accounts created, your account and products start the Google approval process. You do not need to create your accounts prior to onboarding.

**Helpful tips for onboarding!**

Turn off pop-up blockers in your web browser. Some browsers may include pop-up blockers by default (like Chrome). You cannot complete onboarding with pop-up blockers enabled.

Your progress through the onboarding process will not be saved until you tap **Complete Setup**. We recommend completing all of these instructions to fully save your configurations.

**Invalid API key error?** You should have a valid API key to start onboarding. If you receive an invalid key error, follow these instructions to update your API key. You only need to add this key once.

**STEPS**

<table>
<thead>
<tr>
<th>STEPS</th>
<th>WHAT HAPPENS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1: Linking Accounts</strong></td>
<td>Link a <a href="https://magento.com">Magento web account</a> and your <a href="https://google.com">Google account</a>. If you do not have these accounts, you can create them during this step.</td>
</tr>
<tr>
<td><strong>Step 2: Creating GMC Account</strong></td>
<td>This leads you through a 4 step process to create a new Google Merchant Center account.</td>
</tr>
<tr>
<td><strong>Step 3: Creating a Google Ads Account</strong></td>
<td>This leads you through a 2 step process in Magento and in Google Ads to create and activate a new Google Ads account, enter a payment method, and update settings. Optional third step, we also walk you through creating your first Smart Shopping Ads campaign.</td>
</tr>
</tbody>
</table>

When complete, this guide provides next steps to manage your products and kick off campaigns!
Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

Verifying the Google API Key

When opening Google Shopping ads, Magento automatically checks and validates the Google API key you have added in your store configuration. If validated, we send you to the first step of onboarding: Step 1: Linking Magento and Google.

If the key is missing, invalid, or expired, you will need to update the Google API key. The following instructions help you update your key and continue onboarding.

To add the Google API Key:

1. On the Admin sidebar, tap Marketing. Then under Advertising Channels, tap Google Shopping ads.

If your API key is invalid, the following screen displays to walk through the process.
Onboarding API Key Verification

2. Tap **Sign in** to log into your Magento web account. A new tab opens with **Magento Accounts** with the **Api Portal** tab open displaying the key.

   You may need to login with your Magento web account credentials. If you need to create an account, visit [here](#) and register. This account should be part of your company or business.

3. To create a new key, enter a description like "Google Shopping ads" and tap **Add**.

4. Tap ⬅️ to copy your key.

5. Return to the Magento Admin tab and tap **Add the key** on the Google welcome screen.

   A store configuration page opens to **Stores > Configuration > Services > Channels**.

6. In the Google Shopping ads section, paste the key you copied for **API key**.
7. Tap **Save Config**.

8. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**. Magento verifies and validates the entered API key, continuing with onboarding.

   You can also enable service logs during this step. This option is disabled by default and should only be enabled when needed for troubleshooting, as continued logging will negatively impact performance.

   ◆ **Continue to Step 1**

### Linking Google Account

**Step 1 of 3** for **Google Shopping ads Channel onboarding**.

You must link your Magento web account and your Google account. To accomplish this, you'll need your login credentials for the Magento web account that you used to get your API Key and the login credentials for your Google account.

If you see a message requiring a Google API Key, see **Verifying the Google API Key**.

Your **Google account** is a general or business specific account for adding Google services and additional account for Merchant Center and Ads.

- If you already have a Google account, you'll need your Google login credentials to complete this linking process.
- If you don't have a Google account, go to accounts.google.com and click **Create account**. Follow the prompts to create a new Google account. Make note of your login credentials. When your Google account setup is complete, you can sign in to Google and complete this linking process.

We recommend using (or creating) a Google account associated to your business or company. This Google account will be the primary owner (admin) of the Google Merchant Center and Google Ads accounts you set up in this integration with Google Shopping ads Channel. The payment methods you set up in your Google account will be used to complete purchases for Google Ads services.

**Helpful tips for onboarding!** Turn off pop-up blockers in your web browser. Some browsers may include pop-up blockers by default (like Chrome). You cannot complete onboarding with pop-up blockers enabled.

**Sign in to the Google Shopping ads Channel and link to Google:**

1. On the Admin sidebar, click **Marketing**. Then under Advertising Channels, click **Google Shopping ads**.

2. The onboarding overview displays. Click **Get Started**.

3. In **Sign in with Google**, enter your Google account credentials (email address and password) or select an account and sign in.

   You may need to enter an authenticator (if added to the account during creation).
Create a Smart Shopping Campaign

> **Continue to Google Merchant Center Account**

For information about creating your Google account, see Google's Create a Google Account. For information about Google Merchant Center accounts, see the Google Merchant Center Beginner's Guide.

**Creating a Google Merchant Center Account**

**Step 2 of 3** for Google Shopping ads Channel onboarding.

With your Magento web and Google accounts linked, you can create a Google Merchant Center (GMC) account and complete configurations for your products. See the best practices topic for onboarding tips.

**Multiple Domains** (Storefront URLs)

Each GMC account can be associated with one storefront URL. If you have more than one storefront URL, you will create a GMC account for each of your store URLs. See Google's Set up a multi-client account.

*Wait, I have already claimed my URL with another GMC account!*
If your storefront URL is already verified and claimed by another GMC account, you must unclaim any URL that is already claimed for another GMC account before continuing with account creation.

When creating your account, you will do the following:

<table>
<thead>
<tr>
<th>STEPS</th>
<th>WHAT HAPPENS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept GMC Terms of Service</td>
<td>Review and accept the Terms of Service and Prohibited Content policies.</td>
</tr>
<tr>
<td>URL Verification</td>
<td>Select the Website URL to associate with the new GMC account. Your website URL will be verified and claimed by Google.</td>
</tr>
<tr>
<td></td>
<td>Only one domain URL can be associated with one GMC account. If you have multiple domain URLs, you will create a GMC account for each of your site URLs.</td>
</tr>
<tr>
<td>Shipping and Tax</td>
<td>Configure shipping and tax settings to provide an accurate estimate for potential sales. The exact amounts and options will be available to customers when completing checkout through your storefront.</td>
</tr>
<tr>
<td></td>
<td>For complex shipping and tax settings, you have an option to configure these settings in Google after account creation.</td>
</tr>
<tr>
<td>Attribute Mapping</td>
<td>Map your Magento attributes to Google attributes. These connections determine how your products publish to Google.</td>
</tr>
<tr>
<td></td>
<td>You can select to create and configure custom Magento attributes through this process. When you tap <strong>Complete Setup</strong>, Magento adds these custom attributes. You must configure these newly added attributes through the Catalog.</td>
</tr>
</tbody>
</table>

**Important!** Your progress through the onboarding process will not complete until you tap **Complete Setup**. We recommend completing all of these instructions to fully save your configurations, create your GMC account, and send the URL to Google to start URL claiming and verification.

Accepting GMC Terms of Service
Step 1 of 4 for GMC Account Creation.

To create your account, you need to read and accept the Google Merchant Center Terms of Service and policies on Prohibited Content.

We recommend paying close attention to the policies and details for restricted content. Google has specific requirements and guidelines for Adult, alcoholic, copyrighted, gambling-related, healthcare-related, and political products. If you sell Adult products, we guide you through the process of identifying these products during this onboarding process.

To accept the terms and policies:

After entering your Google credentials and signing in:

1. Select the I have read and agree to all terms of service checkbox.

2. Tap Next.

   Continue to Step 2

URL Verification

Step 2 of 4 for GMC Account Creation.

In this step, you will select your website URL to associate to the new Google Merchant Center (GMC) account. The selected site URL will be submitted to Google to be verified and claimed. This URL verification identifies you as the authorized owner of your storefront URL (domain). We recommend reviewing Google’s Verify and claim your website URL.

Magento attempts to automatically verify and claim your site URL after submission. If Magento is unable to verify and claim the URL automatically, it displays a notification that site failed to claim.

If your storefront URL is already claimed to a GMC account, you must unclaim it before it can be verified and claimed by another GMC account. We recommend that you unclaim any storefront URLs that may be already linked to a GMC account.
You can manually verify and claim your site through your GMC account and update the site information for your Magento store.

Selecting your site information:

- **Website URL**: When integrating your store with Google, you select 1 website URL. Repeat onboarding to create new GMC accounts and add another URL.

- **Store Views**: Add store views to add product feeds through Google for locales. You can add multiple store views with a different language selected per view for international storefronts. If you add store views in languages not configured in your Magento backend, the ads will only contain product data from your Magento catalog. Additionally, each store view creates a separate feed in GMC. If a product has errors, you may see that error reported for each store view. For example, if you have 3 store views, 3 errors may display for the same product (one for each view).

**Multiple Domains (Storefront URLs)**

Each GMC account can be associated with one storefront URL. If you have more than one storefront URL, you will create a GMC account for each of your store URLs. See Google's [Set up a multi-client account](#).

**To select the URL to be verified and claimed:**

After accepting the Google terms and conditions, you will select your website URL:

1. For **Website URL**, select the storefront URL you want to associate with this GMC account.

2. Add the store views for your URL selecting a view name, country, and language for each Website URL. You can add multiple store views with a different language selected per view for international storefronts.
a. Select the **Store View Name**.

b. Select the **Country** of origin, used for shipping products and locale.

c. Select a **Language** matching the selected country.

d. Tap **Add Store View Name**.

e. Repeat for each store view and locale as needed.

Google serves and runs ads for all the languages you add in this step. This may increase your cost for running ads. You may want to limit your supported languages when first onboarding and add languages later so you can estimate ad costs for international customers.

3. Enter a **Google Store Name** to identify this store URL and views in your GMC account. This value is used and displayed in Google Ads.

4. When you are finished, tap **Next**.

**Continue to Step 3**

**Shipping and Tax**

**Step 3 of 4** for **GMC Account Creation**.

To provide the best estimate of taxes, shipping, and grand totals for your customers, select the closest matching amounts for shipping and tax costs. Due to the complexity of shipping and taxes, you may want to enter shipping or tax settings through the Google Merchant Center (GMC). Your GMC account has extensive options to help you find the right calculations needed for your store. You must complete onboarding then configure values in your GMC account before Google approves your products.

These settings affect the displayed costs in your Google ads. As customers review ads, Google auto-detects their location, matches ads for them, and displays the calculated costs of product price, shipping, and tax. For example, searching for shoes and hovering over these sneakers, we see the seller provides free shipping and no taxes.
Helpful Tips!

We recommend overestimating amounts if you cannot provide an exact match for costs. Google performs routine checks for merchant listed taxes and shipping costs, verifying the amounts best match actual calculations from your storefront. If the Google defined amounts are lower than your actual costs, Google may disapprove of the products and/or account.

To set your shipping and tax rates:

1. Select and set a flat rate or configure in Google to Set your shipping cost:
   - To assign a flat shipping rate for all your products, select Use a flat rate for all orders and enter an amount per country listed. To set free shipping, select this option and enter 0 for the flat rate.
   - To configure your shipping costs in Google Merchant Center, select I will set this up on Google Merchant Center.

   If you select this option and your country's required shipping costs, you may receive an account error until you configure this setting in Google Merchant Center.

2. Select and set configurations to Set your tax cost:
   - If you are operating inside of the United States, select Use auto tax estimation (U.S. Only).
     If you only sell and ship to some states in the US, select the states where you operate from the list or by entering the name. Google provides estimated taxes based on the address of customers and your configurations. For details, see Google's Set up tax settings (US only).
   - If you are operating out of a country that uses VAT, or have no nexus in the United States, select Don't configure tax/VAT is included in my product price.
3. When complete, tap **Next**.

   > **Continue to Step 4**

### Attribute Mapping

**Step 4 of 4** for **GMC Account Creation**.

Finally, map your Magento attributes with Google attributes. This attribute mapping will sync your product details to Google's product feed format. Once you complete this step, all of your products will be sent to Google with this mapping.

For more information on attributes and data, see **About Google and Magento Catalogs**.

This step can take additional time to complete. You may have an option to create attributes in your Magento catalog for a few of these settings. When you complete this step, the attributes are added and may require additional configurations after creating the account. You must complete this step to create your Google Merchant Center account. You can edit these settings at any time after completion.

For more information about Google's product attributes, see Google's **Product data specification**.

**Bulk resolve product errors**: If you have a large number of products with the same error, you may be able to solve it by creating a **Magento attribute**, configuring it for your products, and mapping it to one of the following Google attributes.
Multiple Attributes

When configuring attributes, you can map multiple Magento attributes to a Google attribute. If each attribute has a value, the first mapped attribute takes priority. For example, If you use both EAN and UPC numbers in your Magento catalog, select both in the GTIN product attribute field. If a product in your catalog has an EAN of 456 and a UPC of 789, the product will use the UPC if it was selected first.

An additional Identifier Exists attribute is available for identifying new products without GTIN and brand or MPN and brand.

For best practices, see Google's Tips to optimize your product data and the following best practices:

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>RECOMMENDED STRUCTURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparel</td>
<td>Brand + Gender + Product Type + Attributes (Color, Size, Material)</td>
</tr>
<tr>
<td>Consumable</td>
<td>Brand + Product Type + Attributes (Weight, Count)</td>
</tr>
<tr>
<td>Hard Goods</td>
<td>Brand + Product + Attributes (Size, Weight, Quantity)</td>
</tr>
<tr>
<td>Electronics</td>
<td>Brand + Attribute + Product Type + Model #</td>
</tr>
<tr>
<td>Seasonal</td>
<td>Occasion + Product Type + Attributes</td>
</tr>
<tr>
<td>Books</td>
<td>Title + Type + Format (Hardcover, eBook) + Author</td>
</tr>
</tbody>
</table>
To map General Attributes:
For each configuration, select attributes from the drop-down list per field, or begin typing to filter the list of attributes. We use the default Magento attributes in these instructions. If you use custom attributes, select those where applicable.

1. Required. For Google title, select Magento "Product Name". This is the name of the product to display in your ads.

2. Required. For Google description, select Magento "Description". This displays to customers when looking at your products through Google Ads.

3. For Google Category attribute, select the option that best matches your catalog:
   - If you want to associate all products sold on Google with one Google Category, select **I sell only one category of products and I do not use Magento attributes**. Select the category from the extensive list. For example, if you sell only clothing, you could select Apparel & Accessories > Clothing. For a list of categories, see Google's google_product_category: Definition.
   - If you use a Magento attribute to signify Google categories, select **I sell multiple categories of products and I use Magento attributes**. Select all Magento attributes from the drop-down field list, or begin typing to filter and select attributes. Add all attributes matching products you will sell through Google.
   - To create new Magento attributes to associate to your catalog, select **I want to create a new Magento attribute**. The new attribute will be added to your products. You will need to add values for the attribute per products to complete account creation.

4. For Google condition, select the option that best matches your product condition(s). For details, see Google's condition: Definition.
• If all of your products fall under one condition, select **The condition of all products in my catalog is the same.** Select the condition, such as new.

• If you use specific Magento attributes for conditions, select **I use Magento attributes to specify the condition of my products.** Select the Magento attributes that best match the Google attributes for New, Refurbished, and Used. Then select and map all Magento attributes applicable per Google condition.

5. For Google **brand**, select the Magento brand attributes assigned to your catalog. This attribute is not required for all products. To increase sales for products you sell with associated brands, we highly recommend configuring and selecting brands. For examples and best practices, see Google’s **brand: Definition.**

6. Select the **GTIN** (Global Trade Identification Number) types for your products, typically assigned by manufacturers. This code is typically a code including UPC, EAN, JAN, ISBN, or ITF-14. To find your GTIN, see Google’s **Find a GTIN.**

7. Select the **mpn** (Manufacturer Part Number) for your products, typically assigned if your product does not have a GTIN. For details, see Google’s **mpn: Definition.**
8. Select the Magento attribute that identifies any new products without a gtin and brand or mpn and brand. For details, see Google's identifier_exists: Definition.

- If all of your products do not have these settings, select All my products don't have GTIN and brand or MPN and brand.
- If you use specific Magento attributes for these new products, select I use Magento attributes to identify products that don't have GTIN and brand or MPN and brand. Select the Magento attributes that identify these products.

To map Apparel and Accessories Attributes:
If your catalog contains apparel and/or accessories, consider mapping the following attributes.

1. For Google Age Group, select the attributes that best match your catalog. For details, see Google's age_group: Definition.

- If all of your products fall under one age group, select The age group of all products in my catalog is the same. Select the age group.
- If you use specific Magento attributes for age groups, select I use Magento attributes to specify the age group of my products. Select the attribute(s). Then select the values that best match the Google attributes for Newborn, Infant, Toddler, Kids, and Adults.
2. For Google Gender, select the attributes that best match your catalog. For details, see Google’s gender: Definition.

- If all of your products fall under one gender, select The age group of all products in my catalog is the same. Select the gender.
- If you use specific Magento attributes for gender, select I use Magento attributes to specify the gender of my products. Select the Magento attribute. Then select the values that best match the Google attributes for Male, Female, and Unisex.

3. For Google Color, select Magento attributes for any colors you use such blue, red, white, black, green, and so on. For details, see Google’s color: Definition.
4. For Google **Size**, select Magento attributes for any genders you use such as extra-small, medium, large, extra-large, or numerical sizes like 16/32. For details, see Google’s size: Definition.

![Attribute Mapping](image)

**To map Adult-Only Content Attributes:**

If your catalog contains items intended for adults only, map the following attributes. Selling Adult-Only products not correctly listed without proper attributes may cause your products or account to be disapproved. For details, see Google’s adult: Definition and policies on Adult-oriented content.

If you use a Magento attribute to indicate adult-only products, select that attribute.

If you have adult-only products, but do not use a Magento attribute, complete onboarding. Then create an attribute, add it to products, and set the value. Finally, update the attribute mapping for Adult-Only with the new attribute.

![Attribute Mapping](image)

**To complete GMC setup:**

If you have completed attribute mapping, tap Complete Setup.

Magento and Google do the following:

- Magento sends all information you configured and entered during onboarding to Google.
- Google immediately creates the GMC account and begins the process to verify and claim the URL.

  The verify and claim process can take a few hours. Check the GMC Account section of the dashboard to check the status. If automated claim is unsuccessful, see Manually verify and claim a site URL.

- Once your URL is claimed and verified and if you have no account errors, Google begins reviewing and approving your synced products. These products become your Google Merchant Center catalog.
If Magento has an issue when creating attributes, a message may display. To resolve, see Editing Attribute Mappings.

Continue to Google Ads

Creating a Google Ads Account

Step 3 of 3 for Google Shopping ads Channel onboarding.

With your Google Merchant Center (GMC) created and products in-progress for approval, create a Google Ads account and complete your first Google Ads Smart Shopping campaign.

Wait, I have a Google Ads account!

Sorry, but the Google Shopping ads Channel implementation cannot support using an existing account. You must create a new Google Ads account.

When creating your account, you will do the following:

![Steps: Terms, Account Settings, Create Ad]

<table>
<thead>
<tr>
<th>STEPS</th>
<th>WHAT HAPPENS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Ads Terms of Service</td>
<td>Review and accept the Terms of Service and Prohibited Content policies.</td>
</tr>
<tr>
<td>Account Settings</td>
<td>Configure your Google Ads account settings, activate your account, add a payment method, and update account settings.</td>
</tr>
<tr>
<td></td>
<td><strong>Important:</strong> Once you specify a currency and create your account, you cannot change the currency. You must also add a payment method and billing settings in the same currency.</td>
</tr>
<tr>
<td>Creating Campaigns</td>
<td>Optional. Create your first campaign as the last step of onboarding, or tap <strong>skip</strong> to create a campaign later. If you skip creating a campaign, you should still add an Ads payment method and update settings.</td>
</tr>
</tbody>
</table>

You should start in the process after creating your GMC account. If not, tap **Create Ad Campaign**.

Accepting Google Ads Terms of Service
**Step 1 of 2** for Ads Account Creation.

To create your account, you need to read and accept the Google Merchant Center Terms of Service. We recommend reviewing Google’s Shopping ads policies and Payment methods & terms of service finder.

**To accept the terms and policies:**

1. On the Google Ads terms of service page, select the I have read and agree to all terms of service checkbox.

2. Tap **Continue**.

   > **Continue to Step 2**

**Account Settings**

**Step 2 of 2** for Ads Account Creation.

To set up your account settings, complete the following:

- Set your country and timezone in the Google Ads Account Settings page. Currency automatically populates when you select a country.
- Activate your Google Ads account through an email invitation.
- Add a payment method in Google Ads.

**To set your currency and timezone:**

1. For the **Select Country**, select the country of origin for your store.

2. The **Currency** automatically sets for your store based on the country you selected. You may update this setting. For example, if you select United States, it sets the currency as USD for US Dollar.
Important: Once you specify a currency and create your account, you cannot change the currency. You must also add a payment method and billing settings in the same currency.

3. For Timezone, select the timezone for your store's region. The timezone you select affects all store data. For example, reports based on segments of time will generate different results depending on the timezone associated with the account.

4. When you are finished, tap Continue.

5. A confirmation message displays. If the settings are correct, tap Confirm Settings. If you need to modify settings, tap Cancel to return to Account Setup.

6. The Create a Smart Shopping Campaign page opens. Complete the steps below before creating a campaign.

Don't forget! You must activate your ads account, configure payment methods in your Google Ads account, and update settings in Magento for your account to go live. If you forget adding a payment method or updating settings, you will see a reminder message in the Magento Admin.

To activate your Google Ads account:
You must activate and configure your account to create active campaign ads.

1. Check your email associated with your Google account.
2. Locate the Google Ads invitation and click the link to activate the account.

To add a payment method:
In your Google Ads account, you must add a valid payment method using the currency selected during onboarding. For complete details, see Google's Choose a payment method.

1. In a new web browser tab or window, open your Google Ads account
2. In your Google Ads account, access your account settings.
3. Locate the **Billing and Payments** section.

4. Add a supported payment method.

5. In Magento, continue with the **onboarding process**.

**To update account settings:**

As a final step, you must update the payment setting for your Google integration.

1. On the Google Shopping ads Channel dashboard, tap **Settings**.

2. In the Google Ads section, select the checkbox for **Payment method configured**. Any payment method banner notifications will end. Your active campaigns publish and run with an approved account and products.

**Onboarding complete!**

Next steps:

- Review and resolve any **account** and **product** disapprovals.
- Create campaigns to run ads on Google.

**Managing Google Accounts**

Google Shopping ads provides detailed status and updates for your Google Merchant Center (GMC) account. After you complete onboarding, monitor your account status through the dashboard. If your account status is not disapproved, review and resolve those listed issues for Google to perform another review. Your account must be approved, with some to all products approved, to display linked products and run campaigns.

Account approval is vital for your GMC account and running ad campaigns.

**Requirements for Accounts**

You need to complete and configure the following for accounts to be approved. Once approved, products are reviewed and campaigns run.

- Completed **onboarding** with a GMC account per URL
- Verified and claimed the URL assigned to the GMC account
- Received account approval from Google

**Google Account Basics**

Understanding the basics and **best practices** helps you get ahead with managing GMC accounts:
Google has guidelines and policies to determine if an account is approved: Google's Terms of Service and policies on Prohibited Content.

Ensure your product catalog does not exceed your account product maximum. Google allows you to sync and sell up to 150,000 products from your Magento catalog. If you attempt to sell more than 150,000 unique products, Google will disable and reduce the number of active products available. To increase your limit, contact Google with this form.

When verifying and claiming your URL, Magento attempts the claim process up to five times within an hour after submission. If the URL is not claimed within five attempts, Magento provides a notification with more information.

Always check back on your Account and Product Errors to resolve issues. We recommend reviewing and resolving product errors as they can cause account disapprovals. Magento performs validation immediately, listing issues in the Product Errors. Google performs revolving checks on your product updates to complete reviews for corrected and added products.

After onboarding completes, we check for product approval and account status with Google every 30 minutes for the first 72 hours of your integration. After the first 72 hours, Magento checks product and account status once every 24 hours.

Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

Account and Product Dashboard

When accessing Google Shopping ads, the dashboard provides a list of all linked GMC accounts and products. At a glance, learn more about your product status with Google. If you have disapprovals, click View details to review and resolve Account details.
## Account and Product Information

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<thead>
<tr>
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<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
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<td>Site URL</td>
<td>The website URL targeted by the ad campaign. This identifies your storefront and product catalog.</td>
</tr>
<tr>
<td>Google Store Name</td>
<td>The name entered when creating your GMC account for your URL, associated to your Magento store. See Google's About your store name.</td>
</tr>
<tr>
<td>GMC Account ID</td>
<td>The unique ID generated by Google for your GMC account.</td>
</tr>
<tr>
<td>Claim Status</td>
<td>The current verification and claim status of your site URL. You must have a claimed and verified URL to receive account approval. See Google's Troubleshooting your URL verification and claim.</td>
</tr>
<tr>
<td>Claimed and Verified</td>
<td>Google completed verification and claiming of the URL for this GMC account.</td>
</tr>
<tr>
<td>Unclaimed</td>
<td>The URL is not claimed yet. The claim process may be in-progress.</td>
</tr>
<tr>
<td>Account Status</td>
<td>The current status of your GMC account with Google. You must have an approved account to get your products approved and run ad campaigns.</td>
</tr>
<tr>
<td>Approved</td>
<td>Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Your GMC account is currently under review by Google. Ad campaigns do not run until the account is approved.</td>
</tr>
<tr>
<td>Disapproved</td>
<td>If your GMC account violates a policy or does not meet requirements, it is disapproved. All product reviews and ad campaigns are paused until the issues are resolved.</td>
</tr>
<tr>
<td>Products Status</td>
<td>The current status of your products associated and mapped to your GMC account. Approved products meet Google product data specifications and Shopping Ads policies. If you sell products of an Adult-Only nature, you must also adhere to Google's Adult-oriented content policies.</td>
</tr>
</tbody>
</table>
### Resolving Account Errors

Your account may be disapproved or suspended due to breaking the Google Terms of Service and policies on Prohibited Content. The following instructions and information help you review and resolve your account issues. Some of the issues that can cause disapprovals may include product issues. When you open an error, the issue displays with additional information and a link to Google policies and instructions. Review the information then complete edits and actions to resolve those issues through the Magento Admin.

Review Google's Understanding account suspension, best practices, and troubleshooting for additional information.

After onboarding completes, we check for product approval and account status with Google every 30 minutes for the first 72 hours of your integration. Google may require up to 10 days to complete reviews. After the first 72 hours, Magento checks product and account status once every 24 hours.

**To resolve account errors:**

1. On the Admin sidebar, tap Marketing. Then under Advertising Channels, tap Google Shopping ads.

2. In the GMC Accounts table, locate an account with Account Status of "Disapproved". In the Actions column, tap Views Details.

3. Tap Account Disapprovals. A list of all account issues displays.
Account Disapprovals

4. For each issue, tap **Read Google guidelines** in the **Actions** column. Complete any changes required to resolve the issue.

Editing Account Settings

After **onboarding**, you can edit and update your account settings anytime on the Settings page in the Google Shopping ads dashboard. Available settings include all GMC options and information you selected when you created your account. The page also provides information and access to your Ads account and to the Magento and Google accounts linked to this Google Shopping ads Channel integration.

Depending on **product** or **account** errors, you may need to update some or all of these settings.

**Have questions?** Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for **Google Shopping ads** in the Magento Help Center for additional troubleshooting topics.

On the Settings page, you can:

- Update GMC account information and settings
- Resend products to Google (manual reindex)
- Remove a GMC account
- Update and view Ads account information and payment method

**Settings Overview**

The settings page includes:
- Google Merchant Center with a table of all created GMC accounts
- Google Ads account associated to your integration including an option for Payment Method and links to access Ads account pages on Google
- Email address of your linked Google account
- Email address of your linked Magento web account

**Google Merchant Center**

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site URL</td>
<td>The website URL targeted by the ad campaign. This identifies your storefront and product catalog.</td>
</tr>
<tr>
<td>Google Store Name</td>
<td>The name entered when creating your GMC account for your URL associated to your Magento store. See Google’s About your store name.</td>
</tr>
<tr>
<td>Google Merchant Center Account ID</td>
<td>The unique ID generated by Google for your GMC account.</td>
</tr>
<tr>
<td>Actions</td>
<td>Click Select to use one of the following options. Updates completed in the Magento Admin save to your GMC accounts.</td>
</tr>
<tr>
<td>OPTION</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Edit URL</td>
<td>Update the URL for the GMC account.</td>
</tr>
<tr>
<td>Edit Shipping and Tax</td>
<td>Modify shipping and tax settings for the account. If you select options to set information in Google, make sure to access and update those settings in your GMC account.</td>
</tr>
<tr>
<td>Edit Attribute Mapping</td>
<td>Modify all attribute mappings between Magento and Google attributes.</td>
</tr>
<tr>
<td>Resend products to Google</td>
<td>Manually reindexes your Magento catalog and sends any product changes to Google.</td>
</tr>
<tr>
<td>Remove</td>
<td>Removes the selected Google Shopping ads Channel integration from the GMC account.</td>
</tr>
</tbody>
</table>

**Google Ads**

These settings cannot be edited after creating the account.

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account ID</td>
<td>Linked Google Ads unique account ID, generated when creating your account.</td>
</tr>
<tr>
<td>Currency</td>
<td>The selected currency. Your billing and payment method in Google Ads must match this currency.</td>
</tr>
<tr>
<td>Timezone</td>
<td>Timezone for your store's region.</td>
</tr>
<tr>
<td>Payment method configured</td>
<td>Select this option when you have added a payment method to your Google Ads account.</td>
</tr>
<tr>
<td>Configure Payment</td>
<td>Link to access payment methods in your Google Ads account.</td>
</tr>
<tr>
<td>View Google Ads Account</td>
<td>Link to access your Google Ads account.</td>
</tr>
</tbody>
</table>

**To update GMC account settings:**

1. On the Admin sidebar, click Marketing. Then under Advertising Channels, click Google Shopping ads.

2. Tap Settings. A list of all accounts and settings display.
3. For a specific GMC account, click Select in the Actions column and select an option in the drop-down list.

**Edit the URL:**
1. Click Edit URL from the Select list.
2. Update the Website URL from the available list.
3. Update the Google Store Name.
4. Click Save Changes.

![URL Setting]

**Edit the Shipping and Tax:**
1. Click Edit Shipping and Tax from the Select list.
2. Update your shipping costs or select a new option.
   - To assign a flat shipping rate for all your products, select Use a flat rate for all orders and enter an amount per country listed. To set free shipping, select this option and enter 0 for the flat rate.
   - To configure your shipping costs in Google Merchant Center, select I will set this up on Google Merchant Center.
      
     If you select this option and your country's required shipping costs, you may receive an account error until you configure this setting in Google Merchant Center.

3. Update your tax settings or select a new option. For more information, see Shipping and Tax.
   - If you are operating inside of the United States, select Use auto tax estimation (U.S. Only). If you only sell and ship to some states in the US, select the states where you operate from the list or by entering the name. Google provides estimated taxes based on the address of customers and your configurations. For more information, see Google's Set up tax settings (US only).
   - If you are operating from a country that uses VAT or have no nexus in the United States, select Don't configure tax/VAT is included in my product price.
4. Click Save Changes.
Shipping and Taxes Setting

To resend products to Google/manual reindex
This action reindexes your Magento product database and sends any changes to Google. You can manually reindex once every 24 hours without affecting your automated index process that is controlled by your cron settings. If attempted within 24 hours of the last manual reindex, the system displays a failure message.

1. On the Admin sidebar, click Marketing. Then under Advertising Channels, click Google Shopping ads.
2. Click Settings. A list of all GMC and Ads accounts and settings display.
3. For a specific GMC account, click Select in the Actions column.
4. Click Resend products to Google.

To remove a GMC account:
1. On the Admin sidebar, click Marketing. Then under Advertising Channels, click Google Shopping ads.
2. Tap Settings. A list of all GMC and Ads accounts and settings display.
3. For a specific GMC account, click Select in the Actions column.
4. Click Remove.
To update Google Ads information and payment method:

1. On the Admin sidebar, click Marketing. Then under Advertising Channels, click Google Shopping ads.

2. Click Settings. A list of all GMC and Ads accounts and settings display.

3. In the Google Ads section, review the linked account information. The linked ID and Visit Google Ads Account will display your Google Ads account in a browser window.

4. To update the payment method, click Configure Payment. Update your billing information with Google.

5. If you have added and updated your payment method, make sure to check Payment method configured. Magento requires this option to be checked.

Unclaiming a Claimed URL

If you have a storefront URL that is already claimed to an existing Google Merchant Center (GMC) account, you can unclaim a claimed URL through Google.

When creating a GMC account in Google Shopping ads Channel, Magento attempts to automatically claim your store URL(s) after submission, but already-claimed sites will fail this automated process. Already-claimed sites must be unclaimed from one GMC account before claiming to another GMC account, as Google allows only one website URL to be associated with one GMC account.

Once unclaimed, a site can be manually verified and claimed.

To Unclaim a Claimed Site URL

1. Login and open your GMC account in Google.

2. Select Business Information, then tap About your business.

3. Expand the claimed Magento website and delete it.

4. Tap Save to update removals from your account.
5. Review the listed URLs on your account to ensure the claims are removed.

Manually Verify and Claim your Site

When you created your GMC account, you selected your storefront URL to associate to your GMC account. Until the site is claimed and verified by Google, the site URL will display on the Google Shopping ads dashboard with a Claim Status of "Unclaimed."

Magento attempts to automatically verify and claim your site URL after submission to Google. If Magento is unable to verify and claim the URL automatically, a notification will display and state that the site failed to claim.

A common reason for a site to remain in "Unclaimed" status is that the site has already been claimed by another GMC account. If you think this might be the case, you must unclaim the site before it can be claimed by your new GMC account. You can then manually verify and claim your site.

The manual verify and claim process includes:

- Logging into your GMC account to copy URL information
- Logging into your Magento admin and updating your store configuration
- Verifying and claiming the site URL in your GMC account

To manually verify and claim your site URL in Google:

Get your URL information in your GMC account.

1. Login and open your GMC account in Google.

2. Select Business Information, then tap About your business. In the Website section, tap Unclaimed for the website you want to claim.
3. The **Other ways to verify and claim your website URL** section displays. Select and copy the meta tag text provided in the field.

**Update your store configuration in Magento admin.**

4. In a separate browser window, log into your Magento admin. Tap **Content** in the admin sidebar. Under Design, tap **Configuration**.

5. In the Website column, locate the store for which the URL is to be claimed. Tap **Edit** in the Action column.

6. Tap **HTML Head**. In the **Scripts and Style Sheets** field, paste the meta tag text you copied in your GMC account.

7. Tap **Save Configuration**.

**Verify and claim the URL in your GMC account.**

8. In the GMC browser window, refresh your browser window. Tap **Verify**, and then tap **Claim**.

On the GMC Accounts dashboard in Google Shopping ads, the Claim Status column for the Site URL will update to "Claimed and Verified."

⚠️ **Have questions?** Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

### Managing Products

Google Shopping ads provides detailed status and updates for your Google Merchant Center (GMC) products. After you complete onboarding and if your account status is not disapproved, products matching your attribute mapping begin syncing to your GMC account. Approved products display in ads depending on campaign settings.

**Requirements for Products to show in Ads**

You need to configure the following for campaigns to actively display ads on Google networks. If these settings are not completed, ads do not run regardless if campaigns are listed as active.

- Completed onboarding with a GMC and an Ads account
- Added a payment method to Google Ads and updated settings (see Account Settings)

**Google Products Basics**

Understanding the basics and best practices helps you get ahead with managing products:
The integration supports all Magento product types excluding gift cards, grouped products, simple products with required options, and bundled products with dynamic pricing.

Google has guidelines and policies to determine if a product is approved: Google product data specifications, Shopping Ads policies, and Adult-oriented content policies.

Ensure your products prices and availability (in or out of stock) match between your online storefront and GMC account. The quantity can differ and does not affect approval. Google uses the Magento Regular Price and Special Price. See Google's Troubleshooter: Preemptive product disapproval (price and availability).

Always check back on your Account and Product Errors to resolve issues. Magento performs some validation immediately, listing issues in the Product Errors. Google performs revolving checks on your product updates to complete reviews for corrected and added products.

After onboarding completes, we check for product approval and account status with Google every 30 minutes. Google may require up to 10 days to review all products initially. All new products may take up to 72 hours for review and approval.

Update product mapped attributes to your GMC account to further refine product information.

This is the prerelease version of Amazon Sales Channel. Content in this version is subject to change.

Account and Product Dashboard
When accessing Google Shopping ads, the dashboard provides a list of all linked GMC accounts and products. At a glance, learn more about your product status with Google. If you have disapprovals, click View details to review and resolve Product details.

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</tr>
</tbody>
</table>
| Products Status       | The current status of your products associated and mapped to your GMC account. Approved products meet Google [product data specifications](#) and [Shopping Ads policies](#). If you sell products of an Adult-Only nature, you must also adhere to Google's [Adult-oriented content](#) policies.
<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Approved</td>
<td>All products matching the attribute mapping for the GMC account have been received, reviewed, and approved by Google. If your GMC account is approved and you have create campaigns, ads run for those associated products.</td>
</tr>
<tr>
<td>Disapprovals</td>
<td>Some or all of the products for the GMC account do not meet the policies and data specifications. When reviewing disapprovals, we provide details on the issues to resolve and get another review.</td>
</tr>
</tbody>
</table>

Actions

Click View details to review Account and Product details. If you have disapprovals or issues, the details pages provide information and links to update products and settings for Google reviews.

Resolving Product Errors

Your products may be disapproved due to incorrect information, mapped attributes, display issues, broken policies, and so on. The following instructions and information help you review and resolve your account issues. When you open an error, all products sharing that error are listed with additional information and a link to Google policies and instructions. Click through each product to actively edit and resolve those issues through the Magento Admin.

Important information about resolving errors:

- As you save changes, product data automatically syncs to Google using a cron job. Reviews may take additional time to initiate and complete. After onboarding completes, we check for product approval with Google every 30 minutes. Google may require up to 10 days to review all products submitted in your onboarding process.

- You may see multiple product issues for the same product. Each store view you added during onboarding created a separate feed in GMC. If a product has errors, you may see that error reported for each store view. For example, if you have 3 store views, 3 errors may display for the same product (one for each view).

- If you have a large number of products with the same error, you may be able to solve it by creating a Magento attribute, configuring it for your products, and mapping it to a Google attribute. This bulk resolves errors.

Review Google’s Product data specification to best understand the product data used by Google. The following information and our best practices and troubleshooting may help resolve issues.
- Your products may break policies on Prohibited Content.
- Ensure your products' prices and availability (in or out of stock) match between your online storefront and GMC account. The quantity can differ and does not affect approval. Google uses the Magento Regular Price and Special Price. See Google's Troubleshooter: Preemptive product disapproval (price and availability).
- Consider not selling products that require personalization or customization during checkout. See Google's Troubleshooter: Personalized goods.
- Determine if your products require a GTIN or Unique Product Identifier using Google's decision form.
- Images may not display correctly due to a number of possible issues including lag in updating files, caching of old images after you provide new images, images use unsupported formats (JPG, PNG, GIF are supported), image URLs have changed or are incorrect, redirection issues, file size issues, and a few other possibilities. See Google's Fix images that aren't displaying.

**To resolve product errors:**
Use these instructions to resolve all product issues.

1. On the Admin sidebar, tap **Marketing.** Then under Advertising Channels, tap **Google Shopping ads.**

2. In the GMC Accounts table, locate an account with Product Status of "Disapprovals". In the Actions column, tap **Views Details.**

3. Tap **Product Disapprovals.** A list of all grouped product issues displays.

![Product Disapprovals](image-url)
4. For each issue, tap **Resolve** in the **Actions** column.

5. The **Resolve Errors** page displays with issue information, a link to Google guidelines, and a list of products disapproved for the issue.

![Resolve Errors](image)

6. For each product, tap **Edit** in the **Action** column.
   
   a. Update information and settings in the product based on the error.
   
   b. Save the product changes.
   
   c. Review and update each product in the list.

7. When complete, tap **Back** to continue resolving errors.

### Editing Attribute Mappings

After onboarding, you may need to update attribute mappings between your Magento catalog and a specific Google Merchant Center (GMC) account.

Immediately after onboarding, you may encounter an issue creating new Magento attributes. If you selected to create a Category, Magento attempts to create an attribute after onboarding. If an issue occurs, see the **Resolve Errors with Attribute Mappings** section.

As your catalog matures and business expands, attribute sets and options may enhance to better define your products. This also helps to bulk resolve Google disapprovals. If you want to add to or modify existing Magento attributes associated per GMC attribute, see the **Update Attribute Mappings with Google** section.

⚠️ **Have questions?** Check out the Google Shopping ads Channel **FAQ** and **best practices** topics to better understand Google and Magento integrations. You can also perform a search for **Google Shopping ads** in the Magento Help Center for additional troubleshooting topics.
Resolve Errors with Attribute Mappings

You have two options to solve issues when creating attributes. Either edit your GMC settings and select another option, or create new attributes and map them.

1. Create a new product attribute.

2. Assign the attribute to the product and set the value.

   If you create an Adult-Only attribute to identify adult-oriented products, it must support "True" and "False" for the value. Google only accepts "True" or "False" for adult attributes.

   For additional information on attributes, see Attribute Mapping.

3. Update attribute mappings in Google Shopping ads.

Update Attribute Mappings with Google

This information walks through editing and updating your attribute mappings. For additional information, see Attribute Mapping.

1. On the Admin sidebar, tap Marketing. Then under Advertising Channels, tap Google Shopping ads.

2. Tap Settings. A list of all GMC and Ads accounts and settings display.

3. For a specific GMC account, tap Select in the Actions column. Select Edit Attribute Mapping. Attributes you mapped during onboarding display for the following values. Update settings as needed.

4. Tap Save Changes.
Attribute Mapping Settings

General Attributes Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Your product’s name.</td>
</tr>
<tr>
<td>Description</td>
<td>Your product’s description. Accurately describe your product and match the description from your landing page. Include only information about the product. Don’t include links to your store, sales information, details about competitors, other products, or accessories.</td>
</tr>
</tbody>
</table>
| Category attribute | • I sell only one category of products and I do not use Magento attributes – If you do not use a Magento attribute to indicate your product category, choose a **Google category** that best matches your products.  
  • I sell multiple categories of products and I use Magento attributes – If you have set up a Magento attribute that uses Google's schema for categories.  
  • I want to create a new Magento attribute – A new Magento attribute will be created and assigned to all products in your store. |
General Attributes Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>catalog. Once setup is complete, assign Google categories to this new attribute at a product level.</td>
</tr>
<tr>
<td>Product Condition</td>
<td>The condition of your product at time of sale.</td>
</tr>
<tr>
<td></td>
<td>- If all of your products fall under one condition, select <strong>The condition of all products in my catalog is the same</strong>. Select the condition, such as new.</td>
</tr>
<tr>
<td></td>
<td>- If you use specific Magento attributes for conditions, select <strong>I use Magento attributes to specify the condition of my products</strong>. Select the Magento attributes that best matches the Google attributes for New, Refurbished, and Used.</td>
</tr>
<tr>
<td></td>
<td>- New – Your product is new and has never been used. It is in its original packaging, which has not been opened.</td>
</tr>
<tr>
<td></td>
<td>- Refurbished – While your product isn’t new, it has been professionally restored to working order so that it appears new, and it comes with a warranty. The product might or might not be in its original packaging. This is sometimes referred to as remanufactured.</td>
</tr>
<tr>
<td></td>
<td>- Used – Your product is a second-hand item. For example, the product has been used before, the original packaging, or the original packaging is missing.</td>
</tr>
<tr>
<td>Brand</td>
<td>Your product’s brand name. This helps identify your product and is shown to users who view your ad. It is required for any product with a clearly associated brand or manufacturer.</td>
</tr>
<tr>
<td></td>
<td>Only provide your store name as the brand if you manufacture the product, or your product falls into a generic brand category.</td>
</tr>
<tr>
<td>GTIN</td>
<td>The product’s Global Trade Item Number (GTIN), which is a globally unique, 14-digit number used to identify trade items, products, or services. Exclude dashes and spaces.</td>
</tr>
<tr>
<td></td>
<td>UPC, EAN, JAN, ISBN, and ITF-14 are currently supported.</td>
</tr>
<tr>
<td>MPN</td>
<td>Manufacturer Part Number. Required for all products without manufacturer-assigned GTINs.</td>
</tr>
<tr>
<td></td>
<td>- Only submit MPNs assigned by a manufacturer</td>
</tr>
<tr>
<td></td>
<td>- Use the most specific MPN possible. For example, different</td>
</tr>
</tbody>
</table>
General Attributes Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifier Exists</td>
<td>Magento attribute(s) that identifies any new products without a gtin and brand or mpn and brand. For details, see Google's identifier_exists: Definition.</td>
</tr>
<tr>
<td></td>
<td>• If all of your products do not have these settings, select All my products don't have GTIN and brand or MPN and brand.</td>
</tr>
<tr>
<td></td>
<td>• If you use specific Magento attributes for these new products, select I use Magento attributes to identify products that don't have GTIN and brand or MPN and brand. Select the Magento attributes that identify these products.</td>
</tr>
</tbody>
</table>

Apparel and Accessories Attributes Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age group</td>
<td>Indicates your catalog has assigned ages groups such as newborn, kids, womens, or mens.</td>
</tr>
<tr>
<td></td>
<td>• The age group of all products in my catalog is the same.</td>
</tr>
<tr>
<td></td>
<td>• I use Magento attributes to specify the age group of my products.</td>
</tr>
<tr>
<td>Gender</td>
<td>Indicates if your catalog has assigned genders, such as unisex, female, or male.</td>
</tr>
<tr>
<td></td>
<td>• The gender of all products in my catalog is the same. If selected, Google associates your catalog to the Google selection.</td>
</tr>
<tr>
<td></td>
<td>• I use Magento attributes to specify the gender of my products.</td>
</tr>
<tr>
<td>Color</td>
<td>The Magento color attribute used for your products</td>
</tr>
<tr>
<td>Size</td>
<td>The Magento size attribute used for your products</td>
</tr>
</tbody>
</table>

Adult-Only Content Attributes Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult only</td>
<td>The Magento adults-only attribute used for your products. If your catalog contains items intended for adults only, select the Magento attribute.</td>
</tr>
</tbody>
</table>
**Adult-Only Content Attributes Field Descriptions (cont.)**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If you have adult-only products, but do not use a Magento attribute, complete onboarding. Then create an attribute, add it to products, and set the value. Finally, update the attribute mapping for Adult-Only with the new attribute.</td>
</tr>
<tr>
<td></td>
<td>Selling Adult-Only products not correctly listed without proper attributes may cause your products or account to be disapproved. For details, see Google's Adult-oriented content.</td>
</tr>
<tr>
<td></td>
<td>• I only sell adult products – Indicates your entire product catalog is Adult-Only, setting the attribute as true in Google.</td>
</tr>
<tr>
<td></td>
<td>• Only products with the following attributes are &quot;adult&quot; products – Set if only a subset of your products are Adult-Only and have a Magento attribute identifying them. Select the corresponding Magento attribute from the drop-down field list.</td>
</tr>
<tr>
<td></td>
<td>• Some of my products are &quot;adult&quot; but I don't use a Magento attribute to specify them – Select if some but not all of your products are Adult-Only. An Adult attribute is added to all products in your catalog. After GMC account creation, make sure to update the attribute as yes/no for all products. Adult-Only products should have the attribute set to Yes or 1.</td>
</tr>
</tbody>
</table>

**Managing Ad Campaigns**

Simplify your ad campaign management, increase your sales, and expand your reach with Smart Shopping campaigns. Smart Shopping campaigns combine, your existing product catalog with Google's machine learning to show a variety of ads across different ad networks. Networks include the Google Search Network, the Google Display Network, YouTube, and Gmail. Smart Shopping campaigns feature both Product Shopping ads and display ads (including Remarketing Ads and Similar Audiences). To learn more about Google Ads, see About Google Merchant Center and Ads.
Requirements for Campaigns

You need to configure the following for campaigns to actively display ads on Google networks. If these settings are not completed, ads do not run regardless if campaigns are listed as active.

- Completed **onboarding** with a GMC and an Ads account
- Added a payment method to Google Ads and updated settings (see **Account Settings**)

Campaign Basics

Understanding the basics and **best practices** helps you get ahead with campaigns:

- Edit the campaign anytime to update settings for Paused and Active campaigns.
- Updates sync immediately to Google.
- The displayed date matches the campaign creation date. If paused then moved to active again, the new active date displays. When you end a campaign, the date clears.
- Create, pause, and end your campaigns directly through the dashboard **Actions** menu. Google Shopping ads Channel does not provide scheduling features.
- Campaigns immediately run with approved products in the Google catalog. The ads include newly approved products as they are processed.
- Campaigns can have the following status: Active (running), Paused (not running), and Ended (completed and not running).
- You can select all or a filter list of products in your Google catalog. The integration supports all Magento product types excluding gift cards, grouped products, simple products with required options, and bundled products with dynamic pricing. Google also recommends not selling products requiring customization or personalization.
Ad Campaign Dashboard

When accessing Google Shopping ads, the dashboard provides a list of all ad campaigns for a date range. At a glance, learn more about the following:

- Calculated reporting of all costs and sales associated to your campaigns
- Campaign details and status
- Action options including editing and pausing campaigns

### Ad Campaigns Dashboard

<table>
<thead>
<tr>
<th>Campaign Name</th>
<th>Entered name for the campaign.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site URL</td>
<td>The website URL targeted by the ad campaign. This identifies your storefront and product catalog.</td>
</tr>
<tr>
<td>Products</td>
<td>Total number of eligible products. Not all products may be published in the campaign.</td>
</tr>
<tr>
<td>Daily Budget</td>
<td>The set average daily budget for spending on ads.</td>
</tr>
<tr>
<td>Cost</td>
<td>The actual amount to spent on the campaign for the time range.</td>
</tr>
<tr>
<td>Clicks</td>
<td>Number of clicks completely on products part of this ad campaign.</td>
</tr>
<tr>
<td>OPTION</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Conversions</td>
<td>Number of purchases completed after clicking on products in this ad campaign.</td>
</tr>
<tr>
<td>Conversion Value</td>
<td>Reported value of conversion from click to purchase. This amount is determined according to the passed gtag.</td>
</tr>
<tr>
<td>Launch Date</td>
<td>The date when the campaign was created. Ended campaigns do not have a listed date.</td>
</tr>
<tr>
<td>Status</td>
<td>Supported Google Ads status for the campaign. For more information, see Google's About campaign status.</td>
</tr>
<tr>
<td>Active</td>
<td>Eligible and actively displays ads on Google. The campaign runs until Paused or Ended through the Actions menu.</td>
</tr>
<tr>
<td>Paused</td>
<td>Inactive due to being paused. To run, the campaign must be enabled and Active. Ads do not display on Google.</td>
</tr>
<tr>
<td>Ended</td>
<td>Campaign was ended through the Actions menu and no longer runs. The date clears. Ads do not display on Google.</td>
</tr>
</tbody>
</table>

Actions

Available actions:

- **Edit**: Open and update campaign settings. Be advised, updating budgets and products in campaigns can start a two week relearning period.
- **Enable**: Activates a campaign and begins running ads based on eligibility. The status sets to Active.
- **Pause**: Deactivates a campaign without ending it. It remains inactive due to being paused, not running again until enabled. The status sets to Paused.
- **End**: Concludes or ends the campaign. The date clears.
Creating Campaigns

Google Shopping ads supports Smart Shopping ads. Smart Shopping campaigns help simplify your campaign management, maximize your conversion value, and expand your store’s reach.

An important aspect to creating and maintaining your ads is the daily budget. Setting a budget indicates the average maximum amount you want spend for displaying and promoting the Smart Ads per day. Google has intelligent tracking and algorithms to evaluate the popularity of your products, ad displays and click-throughs, and much more. If an ad is popular with significant click-throughs, Google may promote the ad more, possible spending more of your budget. The amounts balance, never exceeding your average, and rolling over amounts not spent from one day to the next.

To learn more about Google Ads budgets, see Google's Daily budget: Definition and Set a budget for your campaign.

To create a Smart Shopping campaign:

1. On the Admin sidebar, tap Marketing. Then under Advertising Channels, tap Google Shopping ads.
2. Tap Create Ad Campaign.
3. If you have multiple GMC accounts, locate and Select Your Google Merchant Center account.
4. Select the country of sale for your campaign for the Country to advertise in. If the website store views have product data for that country and locale, content displays in that language.
5. Enter a Campaign Name.
6. Enter a Daily Budget to set the average maximum amount you want to spend on your ads per day. If you do not spend this entire amount in a day, the remaining amount rolls over to the next day.
7. For Select Products for the Campaign, select your products to sell with Google through this campaign:
   - To add all of the GMC products to this campaign, tap Select all products in my Google Merchant Center catalog.
   - To add a specific set of GMC products matching attributes and categories to this campaign, tap Select Products Using Filters. Select from the drop-down list or start typing to add filters for brand or categories.
Create a Smart Shopping Campaign

8. When complete, tap **Review Campaign**.

9. The **Review Campaign** page lists all aspects of your ad campaign, including, review the details of your campaign.
   - To make edits, tap **Edit Campaign**.
   - If everything looks accurate, click **Submit Campaign**. This publishes the campaign on Google. It is active but not running ads until your account and products are approved. When published, the campaign displays in the list on the dashboard.

**Review and Submit the Campaign**

Create Smart Shopping Campaign Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select your Google Merchant Center account</td>
<td>Specifies the Google Merchant Center account for the campaign.</td>
</tr>
<tr>
<td></td>
<td>You cannot edit this setting after campaign creation.</td>
</tr>
</tbody>
</table>
Create Smart Shopping Campaign Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country to advertise in</td>
<td>Specifies the country of sale for the campaign. This setting limits which products from your Merchant Center inventory can be advertised in this campaign. It filters products based on the target country associated with the products.</td>
</tr>
<tr>
<td></td>
<td>You cannot edit this setting after campaign creation.</td>
</tr>
<tr>
<td>Campaign Name</td>
<td>Specifies the Google Ads campaign name, which can be changed later.</td>
</tr>
<tr>
<td>Daily Budget</td>
<td>Sets the approximate limit for how much you want to pay for your ads for a specific campaign, on average, per day. If you do not spend the entire amount each day, the remaining amount rolls over to the next day.</td>
</tr>
<tr>
<td>Select Products for this Campaign</td>
<td>Determines how products are included in the Google Ads campaign. The products used come from the approved products in the Google catalog.</td>
</tr>
<tr>
<td>Select all products in my Google</td>
<td>Adds all products in the GMC catalog in the ad campaign.</td>
</tr>
<tr>
<td>Merchant Center catalog</td>
<td></td>
</tr>
<tr>
<td>Select Products Using Filters</td>
<td>Only products matching the designated filter(s) are included in the ad campaign.</td>
</tr>
</tbody>
</table>

Managing Campaigns

Maintaining and running your campaigns may require editing settings such as targeted products and allocated daily budgets. Before making changes, be advised that Smart Shopping Campaigns have a learning period of two weeks for the Google AI to optimize performance of your ads. Every time you edit and modify a campaign’s budget or assigned products, Google requires another two week re-learning period. If you have submitted product data for the first time or significantly updated existing data in your GMC account, Google may take up to two business days to review the new data. As a result, products in your campaigns may take time to also update.

Depending on conversions and seasons, you may also want to pause or end campaigns to run others, without constantly editing the same campaigns. All campaigns require manual actions to pause, enable (or run), and end. You can create many campaigns to prepare for different seasons and promotions, pausing them until ready to cycle the campaigns.
See the following sections to manage and update your campaigns.

⚠️ Have questions? Check out the Google Shopping ads Channel FAQ and best practices topics to better understand Google and Magento integrations. You can also perform a search for Google Shopping ads in the Magento Help Center for additional troubleshooting topics.

**To edit a Smart Shopping campaign:**

1. On the Admin sidebar, tap Marketing. Then under Advertising Channels, tap Google Shopping ads.

2. For a specific campaign, tap Select in the Actions column, then tap Edit.

3. The campaign opens with the following content:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select your Google Merchant Center account</td>
<td>Specifies the Google Merchant Center account for the campaign. Cannot be modified.</td>
</tr>
<tr>
<td>Country to advertise in</td>
<td>Specifies the country of sale for the campaign. This setting limits which products from your Merchant Center inventory can be advertised in this campaign. It filters products based on the target country associated with the products. Cannot be modified.</td>
</tr>
<tr>
<td>Campaign Name</td>
<td>Specifies the Google Ads campaign name, which can be changed later.</td>
</tr>
<tr>
<td>Daily Budget</td>
<td>Sets the approximate limit for how much you want to pay for your ads for a specific campaign, on average, per day. If you do not spend the entire amount each day, the remaining amount rolls over to the next day.</td>
</tr>
<tr>
<td>Select Products for this Campaign</td>
<td>Determines how products are included in the Google Ads campaign. The products used come from the approved products in the Google catalog.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Select all products in my Google Merchant Center catalog</td>
<td>Adds all products in the GMC catalog in the ad campaign.</td>
</tr>
<tr>
<td>Select Products Using Filters</td>
<td>Only products matching the designated filter(s) are included in the ad campaign.</td>
</tr>
<tr>
<td>Select Products Using SKUs</td>
<td>Only selected products are included in the ad campaign.</td>
</tr>
</tbody>
</table>

4. After making changes, tap **Publish Campaign**.

**To manage campaign status:**

1. On the Admin sidebar, tap **Marketing**. Then under Advertising Channels, tap **Google Shopping ads**.

2. For a specific campaign, tap **Select** in the **Actions** column, then select an action.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable</td>
<td>Activates a campaign and begins running ads. The status sets to Active.</td>
</tr>
<tr>
<td>Pause</td>
<td>Deactivates a campaign without ending it. It remains inactive due to being paused, not running again until enabled. The status sets to Paused.</td>
</tr>
<tr>
<td>End</td>
<td>Concludes or ends the campaign. The date clears.</td>
</tr>
</tbody>
</table>

3. The campaign status updates on the screen and syncs to Google. Depending on the action selected, the campaign may require additional time to complete updating.

**Campaign Reporting**

As your ads run, Google tracks all clicked ads links through to converted sales. Aggregated totals provide quick insight to your sales to determine the effectiveness of your ads, attractive products and prices, and costs per ad. Google Shopping ads Channel provides two options for reviewing your Smart Shopping campaigns through the Magento Admin or **Magento Business Intelligence**.
Magento Reporting

When accessing Google Shopping ads Channel, the dashboard provides aggregated reporting at the account level for the past 14 days (not including the current day). At a glance, learn more about the following:

- Calculated aggregated reporting of all costs and sales collected for your Google Ads Smart Shopping campaigns
- Campaign details and status for the entire run of the campaign
- Action options to modify and manage your campaigns

![All Ad Campaigns Table]

Ad Campaigns Dashboard

Magento Business Intelligence Reporting

Expand your reporting options with Magento Business Intelligence (MBI). We provide links to create a new account, or request to activate Google Shopping ads Channel reports on an existing account. To get started with MBI, select one of the linked options. MBI Essentials provides a Google Shopping Performance Dashboard to review the aggregated results of your Smart Shopping campaigns. MBI Pro provides the features of Essentials and additional options to add data sets to further enhance reporting.

- Account performance
- Campaign performance
- Product performance
- Product Partition (group) performance
CHAPTER 45: Google Shopping ads Channel

Campaign Performance Report

Conversion Reports
CHAPTER 46: **Amazon Sales Channel**

Amazon Sales Channel in Magento is a powerful, comprehensive extension that enables Magento merchants to seamlessly sell products in the Amazon Marketplace, the world’s largest global internet shopping destination. This native extension enables Amazon sales by integrating Magento with your Amazon Seller Central account and providing both automation and synchronization of product and order data. Completely manage all product listings, implement simple or complex pricing rules, and maintain your orders and inventory through a single dashboard.

Getting started is easy. Complete an onboarding process to create an Amazon Seller Central account and integrate with your Magento catalog to manage Amazon listings, orders, inventory, and fulfillment. A central dashboard displays status updates for all store integrations and listings. Reach new customers in the global Amazon Marketplace with simplified and automated processes – all at little or none of the cost and labor of setting up a new system.

After integrating your Amazon Seller Central account, Amazon Sales Channel enables you to manage your accounts and syncs data between Magento and Amazon. Amazon Sales Channel gives you the ability to create listings, manage promotions, set prices, and manage inventory and fulfillment directly through the Magento Admin. These options include pricing rules that monitor Amazon pricing for the same item and automatically adjusts your prices to be more competitive.

This guide reviews some basic Amazon Seller Central information, the requirements for setting up your Amazon Sales Channel, the onboarding and setup process, and the ways in which you can use Amazon Sales Channel to manage your products and sales in the Amazon marketplace.

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**Getting Started with Amazon Sales Channel**

Learn more about Amazon and Amazon Sales Channel basics, key features, best practices, and more.
Onboarding Amazon Sales Channel

Quickly setup and integrate Amazon Seller Central and Magento with a guided onboarding process. Get your Amazon Sales Channel up and running to start selling.

Amazon Sales Channel Home

Learn more about your Amazon Sales Channel Home dashboard and options available. Access and manage store configurations, listings, and more.

Managing Attributes

Amazon Sales Channel maps products between your Magento catalog and Amazon using product attributes. Learn more about creating, mapping, and managing those attributes.

Managing Amazon Listings

As you continue selling through the Amazon Marketplace, you may need to update, add, and manage your listings. Learn more about reviewing the status and completing updates.

- Managing Listing Settings
- Managing Listing Rules
- Managing Listing Pricing
- Managing Listings

Managing Orders and Fulfillment

Amazon Sales Channel supports order fulfillment and shipments through Amazon and Magento. Learn more about fulfilling through Amazon, directly through Magento, and order management options.
Getting Started with Amazon Sales Channel

Amazon Sales Channel integrates Magento with your Amazon Seller Central account. Learn more about key features and integrations.

About Amazon Sales Channel

Amazon Sales Channel is a powerful extension that seamlessly integrates your Magento Admin with your Amazon Seller Central account. Once integrated, Magento becomes a "central command center" for managing listings, monitoring orders and inventory, and controlling pricing for your Amazon store.

The integration connects Magento and Amazon to sync data between both platforms. Amazon Sales Channel enables you to:

- **Onboard** and integrate one or more Amazon Seller Central accounts with Magento.
- Import and sync your existing Amazon listings into your Magento catalog.
- Create and manage Amazon listings for your Magento catalog products.
- Review and fulfill (ship) orders in Magento and Amazon, syncing order status and refunds.
- Review logs for analysis and errors for competitive prices, listing changes, and communication issues.

Manage and review all of these features, account information, listings, orders, and more on the Amazon Sales Channel Home central dashboard.

Promotions and Pricing

With Amazon Sales Channel, you can:

- Synchronize Amazon listing pricing to Magento catalog price (or alternate price attribute)
- Enable MSRP strike-through pricing to increase customer value proposition
- Enable and manage Minimum Advertised Price (MAP)
- Apply additional VAT tax
- Set a custom value for "available quantity" to display with listings to increase buyer urgency
Pricing Rules
With Amazon Sales Channel, you can:

- Create stackable, flexible, and complex rules to manage listing prices
- Create and manage pricing rules for everyday sale or seasonal promotions
- Create price floors to protect your lowest price
- Create and manage intelligent pricing rules that will automatically adjust your product pricing relative to other Amazon competitors (lowest Amazon competitor and Amazon Best Buy Box price)

Catalog Feed Management
With Amazon Sales Channel, you can:

- Import your existing Amazon listings (products) and match to existing or create new products in your Magento catalog
- Publish your Magento products to Amazon to create new Amazon listings
- Create overrides to set an individual price, handling time, condition, and seller notes message
- Import and match your Amazon product attributes for automatic product matching with your Magento catalog
- Set multiple search parameters to match Amazon listings to your Magento catalog
- Set extensive rules to determine which of your Magento products are eligible to be listed on Amazon
- Set a default handling time for your new Amazon listings
- Match listing conditions based on a Magento attribute
- Add seller notes for each condition type (optional)
- Implement quantity thresholds when importing Amazon listings into your Magento catalog
- Create overrides for a group of products
- View recommended listing improvements

Order Management and Customer Service
With Amazon Sales Channel, you can:

- Support and process orders in Amazon and Magento
- Import your Amazon orders into Magento
- Define which of your Magento website stores to associate with your Amazon orders for importing and managing orders
- Review, cancel, and ship orders from Magento and/or Amazon depending on the selected fulfillment
- Map your Amazon order status to custom status within Magento (optional)
- Review and manage order errors, resolving issues and connecting with customers
- Send order tracking data to your Amazon Seller Central account
- Cancel orders and select a reason response
- View the last order action for your Amazon orders

**Reporting**
With Amazon Sales Channel, you can review report information about:

- Listings by statuses of active, inactive, eligible, and incomplete
- Orders awaiting shipment
- Most recent orders
- Amazon listings action log to review overall feed changes (price, quantity, etc.)
- Product listing detail log to view individual product changes
- Product Best Buy Box Competitor Pricing data
- Product Lowest Competitor's Pricing data

**Support for Global Sales**
With Amazon Sales Channel, you can:

- Manage multiple Amazon Marketplace regions all from your Magento Admin
- Support multiple currencies using the Magento Currency Conversion Tool
- Manage shipments from your product locations and Amazon fulfillment centers

**Customer Management**
With Amazon Sales Channel, you can build your Magento customer database by importing customer data associated with your Amazon orders. Leverage and expand your marketing potential through this expanded list of customers through your Amazon Marketplace listings and Magento storefront.

**About Amazon Marketplace**

Amazon Marketplace is an e-commerce platform owned and operated by Amazon that enables third-party sellers to sell new or used products. Using Amazon Marketplace, third-party sellers gain access to Amazon's world-wide customer base. Those who list products on Amazon for sale, including Magento users, are defined by Amazon as "third-party sellers."
Third-party sellers of any size can create an Amazon Seller Central account and use the Amazon Marketplace to reach Amazon’s global customer base. Once an account is created and active, sellers can add and list products for sale, manage orders and inventory, and fulfill orders.

**Amazon Listings**

Amazon listings contain categories of information: Product Information and Listing Information.

**Product Information**

Product information provides data common to every instance of the same product listed on Amazon. For example, several sellers may list a particular brand of yoga pants on Amazon. The general details about the product, such as the name and model number, are the same each time the product is listed. When more than one seller contributes data to a product, Amazon determines which seller’s product information will be displayed on the product detail page.

**Listing Information**

Listing information provides seller-specific information about products. These details often differ from other sellers’ listing for the same product. For example, you may sell the same yoga pants as another seller, but your item number, condition, price, or shipping method time may be different. These details are unique to your listing for the product.

If you want to contribute product information or correct erroneous information on a product detail page, refer to Amazon: Product Detail.

**Amazon Fulfillment**

Amazon offers two options for order fulfillment and shipping to third-party sellers:

- **Fulfilled by the merchant (FBM):** Third-party sellers store their own inventory. When a customer places an order, the seller handles the packaging and shipping to the customer. This option allows you to complete shipments through Magento or another third party.

- **Fulfilled by Amazon (FBA):** Third-party sellers store inventory in Amazon's fulfillment centers around the world. When a customer places an order, Amazon handles the packaging and shipping to the customer. Order details and status are sent to Magento.

Amazon Sales Channel supports both options, receiving and tracking these orders through the Magento Admin. As you complete fulfillment, status updates automatically. For complete details, see Fulfillment Workflows.

**Before selling on Amazon**

Amazon follows a set of policies and workflows to ensure all sellers and products adhere to specified guidelines. To best ensure your products and account are approved and eligible for listing, we recommend reviewing the following information and policies:

- Help for Amazon sellers
- Product detail page rules
- Shipping policies
• Policies and agreements
• Selling policies
• Prohibited seller activities and actions
About Amazon and your Magento Catalog

Your Magento back end includes a catalog with all products and associated settings and information (images, options, prices, and more) and order and shipping configurations. Your Amazon Seller Central account also has a catalog and order configurations, tracking strictly your sales through the Amazon Marketplace.

To better manage and review your product catalog and sales through one location, Amazon Sales Channel imports your Amazon listings into your Magento backend, continually syncs with products and sales, and reports issues and trends. It supports integrations with multiple Amazon Seller Central accounts, tracking all data through the single interface for multiple storefronts.

Product Attributes

Magento manages catalog syncs with the use of product attributes to define product settings and data. Amazon also uses attributes, to be mapped through onboarding. During pre-setup tasks for Amazon Sales Channel, you will define additional Amazon attributes if needed to ensure correct product mappings when importing your Amazon listings into your Magento catalog. These attributes include UPC, EAN, ISBN, and ASIN (Amazon Standard Identification Number). Through onboarding, products sync between Amazon and Magento catalogs using your attributes, especially these. Proper mapping of your Magento and Amazon products ensures a continual synchronization of product information, orders, and inventory.

If you do not have these attributes created or configured for your catalog, we recommend adding a Magento Product attribute and values to your products prior to onboarding. Once an Amazon attribute is imported, it can be used for search, navigation, price rules, and much more. For more information on these attributes, see Amazon: What are UPCs, EANs, ISBNs, and ASINs?

After onboarding, you can manage and update your product attributes and Amazon mappings at any time.

Product Listings

An Amazon listing is a product page for every product you sell through the Amazon Marketplace, displaying product descriptions, prices, images, and more mapped through attributes. During onboarding, you can configure your Magento products can be automatically published to Amazon listings. You can also import your existing Amazon listings by mapping them to your Magento products.

When you have created a listing Magento products, they are submitted to Amazon for approval. Most successful listings are approved within a few hours. If your listing is approved, it will display in the Amazon Marketplace for immediate orders by customers. The Amazon Sales Channel provides a set of tabs to review Amazon listings. Depending on the issue or required data, you may need to review your Amazon Seller Central account for specific details on these listings.
CHAPTER 46: Amazon Sales Channel

- Active: Lists approved product listings available through the marketplace.
- Ready to List: Lists products meeting listing rules requirements and ready to publish to Amazon.
- Inactive: Lists products not available on the marketplace due to being blocked for a specific reason (such as branding issue), closed and requiring relisting, etc.
- Ineligible: Due to the listing rules, lists product that cannot be actively listed on the marketplace (such as 0 quantity, sell dates, etc).
- Incomplete: Lists products missing required information. Update the product data for another review.
- Ended: Lists product listings eligible for listing but manually removed from Amazon. You can relist these products.

Syncing Data

Magento communicates product and order data between your Amazon Seller Central account and the Magento backend. The constant updates provide a single source through Magento to manage and maintain your inventories, fulfilling orders, tracking sales, and reducing overhead and duplication of work. Reporting captures the latest data for tracking trends and resolving communication issues caught between the two systems.

All syncing is managed by a cron job, set to update every five minutes.

Amazon Sales Channel: Best Practices and Limitations

Best practices include:

- Amazon Sales Channel is powerful and can affect your Amazon listings by increasing or decreasing prices, synchronizing product information (including available stock), and adding, updating, and ending (deleting) listings. You should review your listings by status during your setup and adjust your settings (listing settings, listing rules, pricing rules, overrides, etc) before completing your store setup. These settings can also be modified after setup, as needed.
- Amazon Sales Channel can set your pricing rules to automatically adjust your listing price. Automated pricing safeguards include the Floor Price and Optional Ceiling Price features of Intelligent repricing rules. Use of these safeguards helps ensure that your listing prices do not go below your cost or above a defined price.
- Data syncing between Amazon Sales Channel and Amazon is controlled by your Magento cron settings. Built-in throttling between Magento and Amazon help to ensure smooth and efficient data transmission, but during high eCommerce traffic times (such as Black Friday), Amazon’s systems may take longer than usual to update. It is recommended to set your Magento cron to run once every five minutes.
• Amazon Sales Channel imports your Amazon order information. To manage your Amazon orders in Amazon Sales Channel, you must ensure that your order settings are defined to import and create a corresponding Magento order for each Amazon order. If this is not defined, you will only be able to view your Amazon order information.

• All taxes for sales through Amazon are still managed and remitted via your Amazon Seller Central account. In some states, Amazon is required to automatically collect and remit taxes. For other states, sellers have the option of calculating taxes manually or automatically. See Amazon: Tax Policies. You may be required to log into your Amazon Seller Central account to view Amazon Tax Policy documentation.

Limitations include:

• Bundle, gift card, and grouped product types that are part of your Magento catalog are not supported by Amazon Sales Channel for listing to Amazon.

• Amazon Sales Channel cannot create a listing for a product that does not have an existing or previous Amazon listing. If a product does not already exist in Amazon Seller Central with an ASIN, it must be added in Amazon Seller Central so that Amazon can assign the product an ASIN. Once a product is added in Amazon and a listing is created, the listing can be matched to your catalog in Amazon Sales Channel and synced.

Onboarding Amazon Sales Channel

This section describes the requirements and pre-setup tasks for the onboarding process and helps you create, connect, and integrate your Amazon Sales Channel store. Onboarding is simple and fast, after you understand some key concepts how Amazon works with the Amazon Sales Channel in Magento.

Amazon Sales Channel supports the creation of multiple Amazon Sales Channel stores. For a single Amazon Seller Central account that operates in the Amazon region that includes U.S./Canada/Mexico, you will create three Amazon Sales Channel stores (one for U.S. sales, one for Mexico sales, and one for Canada sales). Each of the three stores will define the region during its setup and be integrated with the same Amazon Seller Central account. If you have more than one Amazon Seller Central account, you could potentially have up to three Amazon Sales Channel stores for each of your Amazon Seller Central accounts.

**Helpful tips for onboarding!**

Amazon Sales Channel requires a Professional Seller account on Amazon Seller Central, in the North America region. Amazon charges a monthly subscription and fees for selling. See Amazon: Choose your selling plan.

Your progress through the onboarding process saves as you tap save options or Next through the steps. Your integration is fully complete when you tap Complete Setup. We recommend completing all of these instructions to fully save your configurations.

Until your account and integration is active, your status is "In Setup". If you access your integration to edit settings and configurations, you return to onboarding with your currently saved configurations.
Your Amazon Sales Channel settings affect your Amazon listings. You can review your listings during setup and make any changes before completing your setup and publishing your listings in Store Review. You can also modify your Amazon Sales Channel settings after your setup is complete.

<table>
<thead>
<tr>
<th>STEPS</th>
<th>WHAT HAPPENS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Setup Tasks</td>
<td>Before you begin onboarding, you must ensure you have an active and approved Amazon Seller Central account. There are also some Magento requirements and recommendations to complete prior to onboarding.</td>
</tr>
<tr>
<td>Verify Amazon API Key</td>
<td>When accessing Amazon Sales Channel, Magento automatically checks and validates the Amazon API key you have added in your store configuration. If your API key has not been added or is invalid, you will be prompted to add or update your Amazon API Key.</td>
</tr>
<tr>
<td>Step 1: Store Integration</td>
<td>The first step is to create an Amazon Sales Channel store and connect your Amazon Seller Central account. You need the primary log-in credentials for your Amazon Seller Central account (the email or phone used to create the seller account).</td>
</tr>
<tr>
<td>Step 2: Listing Settings</td>
<td>Configure the interaction settings between your Magento catalog and Amazon listings. These listing settings include attribute mappings between Magento and Amazon, fulfillment, quantity thresholds, and more.</td>
</tr>
<tr>
<td>Step 3: Listing Rules</td>
<td>Configure listing rules to define which Magento catalog products are eligible to be listed on the Amazon marketplace. You have a number of options to include and exclude products, for example automatic creation of listings for new eligible products and exclusion of existing Amazon products setting them to ineligible.</td>
</tr>
<tr>
<td>Step 4: Listing Preview</td>
<td>With your listing rules finalized, review your Magento catalog products as Amazon listings.</td>
</tr>
</tbody>
</table>
### Pre-Setup Tasks

Before starting your onboarding tasks with Store Integration, you must ensure that your Amazon Seller Central account and your Magento account are ready for the integration. To achieve a successful integration and setup, we have outlined some required pre-setup tasks.

Every time you set up a new Amazon store, a list of set up tasks display. We recommend reviewing and completing these tasks the first time you set up a store.

1. In the Admin sidebar, tap Marketing. Then in the Channels section, tap Amazon.

2. On the Amazon Sales Channel Home page, tap Setup Amazon Store.

3. Review and verify you have completed these tasks and configurations.

When you complete the pre-setup tasks and recommendations, you are ready to set up your Amazon Sales Channel store through onboarding. Tap Begin Setup on the Pre-Setup Tasks screen.
1. **Enable background tasks in Magento.**

   All products and data synced between Magento and Amazon is managed by the cron. When you complete tasks like add or update listings and receive orders, a cron job sends and receives data between your Magento backend and your Amazon Seller Central account.

   - Enable Magento cron.
   - For maximum performance, set Magento cron to run once every five minutes.

2. **Create your Amazon Seller Central account.**

   Before you begin to set up your Amazon Sales Channel, you must have an active Amazon Seller Central account. If you don’t have an existing Amazon Seller account in the North America (US, CA, MX) region, you can complete Amazon’s seller account set up process.

   Amazon Sales Channel requires a Professional Seller account on Amazon Seller Central, in the North America region. Amazon charges a monthly subscription and fees for selling. See Amazon: Choose your selling plan.

3. **Make sure you are an approved seller on Amazon.**

   To integrate, you must have an approved Amazon Seller Central account. Your account must not have any restrictions existing on your account for products or categories. Some products and categories require approval prior to creating listings. Review Amazon policies for category and product approval to ensure your products will be approved. See Amazon: Categories and products requiring approval.

   It is also important to ensure that you have configured the following in your Amazon Seller Central account:

   - Ensure your return policy is as good or better than the Amazon return policy. See Amazon: Return Policy
   - Ensure your tax settings are configured. See Amazon: Tax Policies.
   - Ensure that your shipping methods are configured accurately. To set up the shipping methods that Magento will offer to customers to fulfill your Amazon orders, update the Amazon: Shipping Settings in your Amazon Seller Central account.

4. **Increase the number of automatic catalog matches.**

   During onboarding, Amazon Sales Channel uses product attributes to match your existing Amazon listings (if applicable) to existing products in your Magento catalog. After onboarding, these product attributes are used to publish your Magento catalog items to an Amazon listing and to sync your product data between Magento and Amazon.

   To have the highest number of Magento products automatically match with Amazon listings, we recommend creating a set of product attributes to your Magento catalog. Before you set up your Amazon Sales Channel store, we recommend adding Magento product attributes to match these Amazon attributes, for example: ASIN, EAN, ISBN, UPC, or GCID. See Onboarding: Create a product attribute in Magento.
5. **Configure your currency and conversion (as needed).**

If your Amazon store uses a different currency than is configured for your Magento store, enable the currency and set the currency conversion rate.

6. **Create a Product Condition attribute (as needed).**

If your Amazon listings contain more than one product condition (new, used, like new, etc), create a Magento attribute and assign condition values. You will need to map this attribute during onboarding to the Amazon Condition product attribute. See Creating Attributes for Amazon.

7. **Configure your Amazon Seller Central shipping method.**

To set up shipping methods that you will offer to fulfill your Amazon orders, refer to Settings > Shipping Settings in your Amazon Seller Central account.

**Additional configurations**

Once your Amazon account is set up and active, there are several Magento recommendations that will help streamline the Amazon Sales Channel onboarding process.

**Review and note any products you don't want to list on Amazon.**

You may not want some products to be listed on Amazon. Amazon Sales Channel has a listing rule engine that is used to determine which products are eligible for publishing to Amazon. Listing rules allow you to select subsets of products to be published (or not published) to your Amazon Seller Central account, such as by category selection or by defining one or more product attributes. Like Magento catalog or shopping cart price rules, product attributes used for Amazon listing eligibility must be set to "Used for Promo Rule Conditions".

**Set your Amazon Seller Central Region to Inactive.**

To help facilitate error-free data transition during integration, we highly recommend setting your Amazon region to "Inactive" status in Settings > Account Info > Vacation Settings. Refer to Amazon: Listing Status for Vacations. Once your setup is complete, change the status back to "Active" in Amazon.

> **Continue to Verify API Key**

**Creating Attributes for Amazon**

Prior to onboarding your Amazon Seller Central accounts, we recommend adding Magento **product attributes** to map your product listings. After you complete onboarding, you can manage your product attributes through the Managing Attributes tab of the Amazon Sales Channel Home.

These instructions detail how to create Magento attributes for Amazon ASIN and Amazon Condition. We recommend creating additional attributes including Amazon EAN, Amazon ISBN, and Amazon UPC. You may want to also create an Amazon Price attribute if you want to use your Amazon listing price as a price source for pricing rules. These attributes are used when
configuring your listing and pricing settings during onboarding. They are also be used when creating Amazon listings and when updating and syncing your Magento catalog with your Amazon listings.

Catalog Search settings enable you to set matching search parameters that help to map eligible Magento products with Amazon listings. Once mapped, Amazon activates actions related to pricing, quantity, overrides, and order and product synchronization.

Defining these values increases the potential for exact matches, minimizing the need to manually match product listings later. Adding the attributes as part of your onboarding Pre-Setup Tasks, Amazon Sales Channel has a higher potential for automatically matching your products during onboarding and syncs product data between Amazon and Magento after onboarding.

If you only create the Amazon ASIN attribute (without adding ASIN values per product), your Magento products may not automatically your Amazon listings will automatically. You can manually match your products through Store Review. However, manual matching does not create the data elements needed to share and sync your product data.

**Important:** If you manually matched a product and you need to update an ASIN, UPC, or other data element for the product, you would have to update the data in both places, in your Magento catalog and in your Amazon listing in your Amazon Seller Central account.

### To create the Amazon ASIN product attribute:

1. Log into your Magento Admin.
2. Tap Stores in the left-side menu. In the Attributes section, tap Product.
3. Tap Add New Attribute to display the Attributes Properties screen.
4. For Default Label, enter "Amazon ASIN" (the name for your attribute).
5. For Catalog Input Type for Store Owner, choose Text Field.
6. From the Values Required drop-down, choose No.

Although an Amazon ASIN is required to list a product on Amazon, some of your catalog products may not be listed on Amazon.

7. Expand the Advanced Attribute Properties section.
   a. For Attribute Code, enter "amazon_asin".
   b. For Scope, choose Global.
   c. For Unique Value, choose No.
   d. For Input Validation for Store Owner, choose None.
   e. For Add to Column Options, choose Yes.
   f. For Use in Filter Options, choose Yes.
8. Tap **Save Attribute**.

<table>
<thead>
<tr>
<th>Attribute Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Default Label</strong></td>
</tr>
<tr>
<td><strong>Catalog Input Type</strong></td>
</tr>
<tr>
<td><strong>Values Required</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Advanced Attribute Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Attribute Code</strong></td>
</tr>
<tr>
<td><strong>Scope</strong></td>
</tr>
<tr>
<td><strong>Default Value</strong></td>
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<tr>
<td><strong>Unique Value</strong></td>
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<tr>
<td><strong>Input Validation</strong></td>
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<tr>
<td><strong>Add to Column Options</strong></td>
</tr>
<tr>
<td><strong>Use in Filter Options</strong></td>
</tr>
</tbody>
</table>

**Amazon ASIN Attribute**

**To create the Amazon Condition product attribute:**

1. Log into your Magento Admin.
2. Tap **Stores** in the left-side menu. In the Attributes section, tap **Product**.
3. Tap **Add New Attribute** to display the Attributes Properties screen.
4. For **Default Label**, enter **Amazon Condition** (the name for your attribute).
5. For **Catalog Input Type for Store Owner**, choose **Dropdown**. The Manage Options (Values of your Attribute) section will display.
6. For **Values Required**, choose **No**.
7. For **Manage Options (Values for your Attribute)**, add each of your condition options.
Standard Amazon conditions include:

- New: Refurbished: Used
- Like New: Used
- Very Good: Used
- Good: Used
- Acceptable: Collectible
- Like New; Collectible
- Very Good: Collectible
- Good: Collectible; Acceptable

a. Tap **Add Option**.

b. Tap to check the Is Default radio button for the option you wish to be the default selection.

c. In the Admin column, enter the text for the label of the condition you are adding (New, Used, Used-Like New, etc.)

d. Tap **Add Option** to add more drop-down options, as needed.

8. Expand **Advanced Attribute Properties** section.

a. For **Attribute Code**, enter "amazon_condition".

b. For **Scope**, choose **Global**.

c. For **Unique Value**, choose **No**.

d. For **Input Validation for Store Owner**, choose **None**.

e. For **Add to Column Options**, choose **Yes**.

f. For **Use in Filter Options**, choose **Yes**.

9. Tap **Save Attribute**.
### Attribute Properties

<table>
<thead>
<tr>
<th>Default Label</th>
<th>Amazon Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Input Type for Store Owner</td>
<td>Dropdown</td>
</tr>
<tr>
<td>Values Required</td>
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</tbody>
</table>

#### Manage Options (Values of Your Attribute)

<table>
<thead>
<tr>
<th>Is Default</th>
<th>Admin</th>
<th>Default Store View</th>
<th>CA Store View</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>New</td>
<td></td>
<td></td>
<td>Delete</td>
</tr>
<tr>
<td>☐</td>
<td>Used; like new</td>
<td></td>
<td></td>
<td>Delete</td>
</tr>
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<td>☐</td>
<td>Used; very good</td>
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<td>☐</td>
<td>Used; good</td>
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<td>☐</td>
<td>Used; acceptable</td>
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<td></td>
<td>Delete</td>
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<tr>
<td>☐</td>
<td>Collectible; like new</td>
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<td>☐</td>
<td>Collectible; very good</td>
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<td>☐</td>
<td>Collectible; good</td>
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<td>Delete</td>
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<tr>
<td>☐</td>
<td>Collectible; acceptable</td>
<td></td>
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<td>Delete</td>
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<tr>
<td>☐</td>
<td>Refurbished</td>
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<td>Delete</td>
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</table>

[Add Option]

#### Advanced Attribute Properties

<table>
<thead>
<tr>
<th>Attribute Code</th>
<th>amazon_condition</th>
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</thead>
<tbody>
<tr>
<td>Scope</td>
<td>Global</td>
</tr>
<tr>
<td>Unique Value</td>
<td>No</td>
</tr>
<tr>
<td>Input Validation for Store Owner</td>
<td>None</td>
</tr>
<tr>
<td>Add to Column Options</td>
<td>Yes</td>
</tr>
<tr>
<td>Use in Filter Options</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Amazon Condition Attribute
Verify the Amazon API Key

When accessing Amazon Sales Channel, Magento automatically checks and validates the Amazon API key you have added in your store configuration. If validated, then you can move on to the next step, Store Integration.

If the Amazon API key is missing, invalid, or expired, you must update your key. A message displays prompting you to get an API key and to add they key to your Amazon Sales Channel configuration.

**To get and add the Amazon API key as prompted:**

The API key is validated each time you access your Amazon Sales Channel.

1. On the Admin sidebar, tap **Marketing**. Then under Channels, tap **Amazon**.

   If you need an to update your API key, the following screen displays to prompt you through the process.

   ![Welcome to Amazon Sales Channel](image)

**Update the Amazon API Key Prompt**

2. Tap **Sign in**. The **Magento Accounts** page displays in a new browser tab. If you are logged into your Magento account, the API Portal section of the My Account page displays automatically. If you are not logged it, you are prompted to enter your Magento username and password before the API Portal tab displays.

   If you need to create a Magento account, visit [here](#) and register. This account should be part of your company or business.

3. API keys can be viewed and generated on the **API Portal** tab in your Magento account. If you need to create a new API key, ensure the **Environment** drop-down is set to "Production." Then enter a description like "Amazon Sales Channel" and tap **Add New**. The new key is generated and displayed with the name you entered. Tap **Copy** to copy the new key.
Generate or Copy an API Key

4. With the new key generated and copied, return to the Amazon Sales Channel browser tab. On the Welcome to Amazon Sales Channel screen, tap Add Key. The browser exits Amazon Sales channel and displays the Magento Services tab in your store configuration page.

5. Paste the copied key into the Production Api key field.

6. Tap Save Config. You can now return to Amazon Sales Channel.

Add your API Key in the Magento Services screen in your Store Configuration

7. On the Admin sidebar, tap Marketing. Then under Channels, tap Amazon. Magento verifies and validates your API key and allows you to continue with setup. If the verification screen displays again, repeat the process.

› Continue to Store Integration
Store Integration

**Step 1 of 7** for Onboarding Amazon Sales Channel

To begin, create an Amazon Sales Channel store and connect it to your Amazon Seller Account. This integrates your Magento and Amazon accounts to share data, sync products, and more. You need your Amazon Seller Central account credentials to complete this step. You cannot continue with onboarding until you connect your stores.

After integrating your Amazon account, you will be prompted annually to renew your Amazon Sales Channel connection to Amazon by granting access again.

**To integrate with Amazon:**

1. In the Admin sidebar, tap Marketing. Then in the Channels section, tap Amazon.

2. Tap Setup Amazon Store.
   
   A list of Pre-Setup Tasks displays with an overview of prerequisites. When ready, tap Begin Setup.

3. For Email Address, enter your preferred contact email address.

4. For New Store Name, enter a descriptive name for your new Amazon Sales Channel store.
   
   This name is used as a Magento reference only and will identify the store in the list on the Amazon Sales Channel Home page. You will want to make it something your team can easily identify. For example, your Amazon store that sells in the United States region might be named “Amazon Store USA”.

5. From the Amazon Marketplace drop-down, select the region in which for your Amazon store sells.

6. Tap Save Marketplace. Your new marketplace is saved. Next, connect your new store with your Amazon Seller Central account.
Create your Sales Channel Store

7. Tap **Connect to Amazon Store** to launch Amazon Seller Central in a new tab.

8. Enter your Amazon Seller Central account credentials and tap **Sign in**.

   To complete this connection, you must sign in to your Amazon Seller Central account using the login credentials for the primary user (the email or phone used to create the seller account).

9. Complete the Amazon Two-Step Verification by entering the code you receive from Amazon and tap **Sign in**.

10. Tap **Continue** on the Amazon Marketplace Web Service confirmation screen.

    You have granted Amazon Sales Channel permission to access and share data with your Amazon Seller Central account. The Amazon screen closes. A confirmation message displays for the integration.

11. Tap **OK** for the confirmation. Then tap **Next**.

   > Continue to Step 2 of Onboarding

Onboarding: Listing Settings

**Step 2 of 7** for Onboarding Amazon Sales Channel

If you are managing a store that is in "Active" or "Inactive" status, see **Listing Settings**.
Listing settings are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing settings for a store during setup in the **Amazon Stores** tab in Amazon Sales Channel Home. Tap the store's name in the store list to display the store's onboarding progress. Tap **Listing Settings** in the progress bar.

Listing settings define how your Magento catalog products are listed on Amazon. Your listing settings consist of several categories that allow you to define the interactions and communication between Amazon Sales Channel and your respective Amazon Seller Central account.

When configuring your listing settings, you define your eligibility rules for your Magento catalog products to automatically published to Amazon as new listings, set up your Amazon listing prices based on your Magento catalog or on competitor pricing, define your fulfillment method, and more.

Settings are grouped and available in sections, to expand and configure as needed.

**To configure listing settings:**

1. Expand each section to review and configure listing settings. Complete all required fields to continue.

   - **Product Listing Actions**: Defines if eligible Magento products automatically publish to Amazon and the default handling time for shipments (2 is default).
   - **Third Party Listings**: Defines if Amazon Seller Account product listings should be imported into your Magento catalog.
   - **Listing Price**: Cap Magento pricing attributes and configure pricing settings.
   - **(B2B) Business Price**: Define your tiered-pricing settings when selling to another business.
   - **Stock / Quantity**: Configure your stock management thresholds for inventory management.
   - **Fulfilled By**: Define who fulfills orders.
   - **Catalog Search**: Configure your search parameters to ensure a reliable process for matching your Magento catalog products with your Amazon product listings.
   - **Product Listing Condition**: Configure your settings and values for product "condition." Condition is a product detail that is required by Amazon, but is not required for your Magento catalog products.

2. Tap **Next** to save settings and continue to **Listing Rules**.

Onboarding steps and sections can be reviewed and modified as much as needed, until you tap **Complete Setup** in the Store Review step. Once setup is complete, these settings can be accessed and modified from the dashboard for the sales channel store.
If you are managing a store that is in "Active" or "Inactive" status, see Product Listing Actions. The Product Listing Actions section defines how your catalog interacts with Amazon. These settings include:

- Indicate if your Magento catalog products that meet Amazon eligibility requirements are automatically sent to your Amazon Seller Central account to create new listings.
- Set the default handling time for an order. This value defines the number of days generally required for you to process and ship an order. For example, if someone selects 2-day shipping, that shipping transit time does not start until processing completes and packages are handed off to a carrier. The total delivery time is (handling time + transit time + any holidays).

These settings are part of your store's Listing Settings. Update these configurations during onboarding through the Listing Settings step.
To configure Product Listing Actions settings:

1. Expand the Product Listing Actions section.

2. For Automatic List Action (required), choose an option in drop-down:
   - **Automatically List Eligible Products**: Select this option if you want your Magento catalog products (that meet Amazon's eligibility requirements) to automatically push to Amazon and create new Amazon Listings.
   - **Do Not Automatically List Eligible Products**: Select this option if you want to manually select your eligible Magento catalog products and create new Amazon Listings. When selected, catalog products that meet your listing criteria and contain all required information display on the Ready to List tab for manual publishing. The Ready to List tab only displays if this option is selected.

3. For Default Handling Time (required), enter a numerical amount of lead time days needed before shipment. The default value is 2 days.

   This default handing time value is only effective for Amazon listings created through Amazon Sales Channel. Any Amazon listings that were created in your Amazon Seller Central account use the default handling time set for the listing in Amazon.

4. When complete, continue to the Third Party Listings section.

Onboarding: Third Party Listings

**Step 2 Options** for Listing Settings

If you are managing a store that is in "Active" or "Inactive" status, see Third Party Listings.

The Third Party Listings section defines if your Magento catalog will import products from your existing Amazon Seller Central listings. We recommend importing listings from Amazon, to ensure all listings have matching Magento products. By having your listings as part of your
Magento catalog, you can manage all of your products from a single catalog and leverage Amazon Sales Channel features including fulfillment and order management with Amazon, intelligent repricing, and quantity management.

When you set to "Import listing", Amazon Sales Channel imports your Amazon listings into your Magento catalog, attempting to match them to existing products. If a match is not automatically found, you can import the Amazon listing as a new Magento product or manually match the listing to a product.

If you select to import listings, select the Magento attributes with values for Amazon Seller SKU and Amazon ASIN. If you do not have Magento product attributes, consider creating and assigning them. Mapping these attributes helps correctly match imported Amazon listings to your Magento products.

The initial listing import initiates when completing your store's setup during onboarding. After setup is complete and based on your cron settings, Magento continually checks for newly added Amazon listings (not created in Amazon Sales Channel) and updates your catalog according to these settings.

These settings are part of your store's Listing Settings. Update these configurations during onboarding through the Listing Settings step.

**To configure Third Party Listings settings:**

1. Expand the Third Party Listings section.

2. For Import Third Party Listings (required), select an option in the drop down:
   - Import Listing: Select this option if you want products and information from your Amazon listings to import into your Magento catalog of products. This is the recommended and the default setting.
   - Do Not Import Listing: Select this option if you want to manually create and assign new products to your Magento catalog for your Amazon listings.

   The following options fields are only active when you select to "Import Listing."

3. For Attribute That Contains Amazon Seller SKU, select the Magento attribute that matches to the Amazon Seller SKU value.

4. For Attribute That Contains Amazon ASIN, select the Magento attribute that you created and match it to the Amazon ASIN.

   If you did not create these Magento attributes for your Amazon listings, see Creating Attributes for Amazon Matching for information.

When complete, continue to the Listing Price section.
Third Party Listings

Control whether to import existing listings contained within the Amazon marketplace

Import Third Party Listings + Import Listing

Attribute That Contains Amazon Seller SKU

SKU

Attribute That Contains Amazon ASIN

Amazon ASIN

Third Party Listings

Onboarding: Listing Price

Step 2 Options for Listing Settings

If you are managing a store that is in "Active" or "Inactive" status, see Listing Price.

The Listing Price setting defines which Magento pricing attribute to use as your price source, which is the base (default) price value for your Amazon listings. These defined settings will be used by your pricing rules to automatically adjust your Amazon listing price relative to the selected Magento Price Source.

You can configure your pricing scope as global or website. If your pricing scope is set to global, this means that there is a single price source for all your stores/websites. If your pricing scope is set to website, the price source will use fallback logic of website price (if available) followed by the default (global) price.

If your listing rules have more than one website selected in its settings, the order with which website price is used is determined by the website priority configured in your listing rules. This allows you to define product pricing across your catalog. To see if you are using website price scope, see Catalog Price Scope.

The options listed in Magento Price Source, Minimum Advertised Price (Map), and Strike Through Price (MSRP) include your configured Pricing attributes. Pricing attributes are Magento product attributes with the Catalog Input Type for Store Owner value set to Price. See Attribute Input Types.

To configure Listing Price settings:

1. Expand the Listing Price section.

2. For Magento Price Source (required), select a pricing attribute in the drop-down (default is "Price").
The option selected in this field determines the price source used for your Amazon listings. If you create pricing rules, the rules are applied to the value defined for the attribute selected here. You may select any configured pricing attribute, however, if the selected attribute is not filled in for a product, the price source for the product will default back to "Price" when pricing rules are applied to determine the published Amazon listing price.

3. For **Minimum Advertised Price (MAP)**, select a pricing attribute in the drop-down (default is no selection).

   This field enables a minimum advertised price (MAP) for a product. When you define a pricing attribute and your listing price for a product falls below your determined minimum price (based on your pricing source and rules), this value becomes the MAP for the listing. This allows you to implement pricing rules while still controlling your minimum price for a product. To prevent a listing price from being too low, select a pricing attribute to use as your MAP. However, if the selected pricing field is not defined for a product, the MAP will not be used.

4. For **Strike Through Price (MSRP)**, select a pricing attribute in the drop down (default is no selection).

   This field determines which pricing attribute is used as the manufacturer's suggested retail price (MSRP) for a product. If your listing price is less than the defined MSRP, your Amazon listing will display a strike-through of the MSRP price and display the lower listing price, along with the calculated “You Save” amount and percentage. However, if the selected pricing field is not defined for a product, the MSRP feature will not be calculated.

   **Important:** This will only apply to listings that have won the Buy Box position. The Buy Box is awarded by Amazon to the seller who has the product listed usually at the best price, along with other factors such as FBA/Prime shipping offered, availability, and the seller’s performance.

5. For **Apply Value Added Tax (VAT)** field, select an option (default is "Disabled").

   - **Disabled:** Select this option if you do not want to apply VAT to your listing price.
   - **Enabled:** Select this option if you want to apply VAT to your listing price. VAT is typically used as a sales tax in European countries and is added to your final listed price within Amazon. VAT does not apply to final price for listings that are used within an intelligent pricing rule, unless the price floor is hit.

6. For **VAT Percentage**, enter the value for your VAT rate (default is "0.00").

   The value entered in this field will be used to calculate the VAT amount to be added to the listing price. If 10.2 is entered, a 10.20% VAT will be applied to your listing price. This field is disabled when the Apply Value Added Tax (VAT) field is set to "Disabled."

7. For **Currency Conversion**, select an option (default is "Disabled").

   The options in this drop-down are dependent on your Magento currency settings. If options are not available, you may need to set up your currency settings.

8. When complete, continue to the **(B2B) Business Price** section.
Onboarding: (B2B) Business Price

**Step 2 Options** for Listing Settings

If you are managing a store that is in "Active" or "Inactive" status, see *(B2B) Business Price.*

Amazon Business is a marketplace exclusively open for Amazon registered business accounts, and only available in the United States, France, Germany, and the United Kingdom in 2019. If the marketplace allows B2B business pricing, it will be editable within your listing settings.

B2B Business Pricing allows merchants with business accounts to purchase from each other with the expected performance of the Amazon shopping experience. With B2B business pricing, businesses can offer tiered pricing based on the quantity purchased.

For your products to be listed on the Amazon Business (B2B) site, you must first enable business in your Amazon Seller Central account. For more information on the B2B feature, see **Amazon: B2B Central.**

These settings are part of your store's **Listing Settings.** Update these configurations during onboarding through the **Listing Settings** step.

**To configure (B2B) Business Price settings:**

1. Expand the **(B2B) Business Price** section.
2. For **Enable Business Pricing**, select an option (default is "Disabled").
• **Disabled**: Select this option if you do not want to enable business to business sales. All other fields in this section are disabled when this option is selected.

• **Enabled**: Select this option if you want to enable your business to business sales. When enabled, the business price is set equal to the list price after all pricing rules have been applied. The business price follows the website pricing scope, if enabled. A business price can not be less than $1.

3. For **Enable Tiered Pricing**, select an option (default is "Disabled").

• **Disabled**: Select this option if you want the same listing price for all order quantities. All Pricing Level fields in this section are disabled when this option is selected.

• **Enabled**: Select this option if you want to enable pricing that adjusts based on order quantity. When enabled, the Pricing Level quantity and discount fields enable.

4. Complete the **Pricing Level** settings.

   You can define up to five quantity/discount settings that set the tier pricing for your business listings. In each row, enter the quantity threshold value and the discount percent to apply. For example, if you enter 5 in the first field of the first row and 5 in the second field, when another business purchases a quantity of 5 or more, the price will apply a 5% discount.

5. When complete, continue to the **Stock / Quantity** section.
**Step 2 Options** for Listing Settings

If you are managing a store that is in "Active" or "Inactive" status, see Stock/Quantity.

The Stock/Quantity settings are used to sync the product quantity details from your Magento storefront to the quantity on your Amazon Seller Central account. This tool is very powerful and can be leveraged for additional advertising by displaying urgency to the buyer while keeping your inventory organized. For example, some merchants may have 150 items of a particular SKU in stock in their warehouse, and want to make sure that Amazon shoppers can purchase all of their inventory. Other merchants may wish to only list one item at a time to create a sense of scarcity to the end user. To do this, you would set the Maximum Listed Quantity to 1.

Quantity is a regional attribute, and based on the Amazon Marketplace option selected during store integration. When a change is made to a product's quantity, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration). Your first Amazon store that is set up (with the oldest creation date) controls priority in the quantity settings.

These settings are part of your store's Listing Settings. Update these configurations during onboarding through the Listing Settings step.

**To configure Stock / Quantity settings:**

1. Expand the Stock / Quantity section.

2. For **Out-of-Stock Threshold** (required), enter a numerical value for the lowest quantity of a product in order to keep the product eligible for its Amazon listing (default is "0").

   This means that if your Magento product stock goes lower than this number, the respective Amazon listing will be ineligible for sales through Amazon.

3. For **Maximum Listed Quantity** (required), enter a numerical value for the quantity you wish to display in your Amazon listing.

   This will list all your eligible Amazon listings at the entered value. As soon as an item is sold, the Amazon listing will continue to display this quantity. The displayed listing quantity available will always use this value, even when your actual product quantity is higher or lower. This setting is typically used when you do not manage product inventory.

   For example, you may have a product with a quantity of 80 in your Magento catalog. With this Maximum Listed Quantity set to "10," the Amazon listing will always display a quantity available of 10 and will refresh each time a sale is made for the product.

4. For **"Do Not Manage Stock" Quantity** (required), enter a value for your display quantity for your Amazon listings.
Amazon requires that you publish an available quantity. For Magento products that are set to not manage stock but you want to list them on Amazon, the listing will be published with available quantity of the value entered here.

5. When complete, continue to the Fulfilled By section.

![Stock/Quantity](image)

**Stock/Quantity**

**Onboarding: Fulfilled By**

**Step 2 Options** for Listing Settings

If you are managing a store that is in "Active" or "Inactive" status, see Fulfilled By. "Fulfilled by" settings define who fulfills (or ships) orders. If all of your orders are fulfilled using one method, select between merchant (you) or Amazon. If you plan on fulfilling orders from your locations and using Amazon, we recommend using the third option and configuring a Magento product attribute.

- **Fulfilled by Merchant**: Select this option when you, the merchant, will fulfill all orders. When an order is placed, inventory will be deducted from your Magento catalog.

- **Fulfilled by Amazon**: Select this option if Amazon will fulfill all orders. When selected, product inventory is not deducted from your Magento catalog when an order is placed. Inventory stock for Amazon fulfilled orders is stored and deducted from their warehouses. Before assigning this option, you must verify in your Amazon Seller Central account that your products are eligible for FBA fulfillment. FBA inventory is directly managed through your Amazon Seller Central Account. With this fulfillment method, Amazon Sales Channel does not share quantity updates between Magento and Amazon. Therefore, not all of the marketing tools described in the Quantity Settings will be available to you in Amazon Sales Channel.
Assign Fulfilled By Using Magento Product Attribute: If your products may be fulfilled by you and Amazon, you may want to create a Magento product attribute with values for Fulfilled By Merchant and Fulfilled by Amazon. Setting this value per product indicates who fulfills the orders.

The fulfillment method is a regional attribute, and based on the Amazon Marketplace option selected during store integration. When a change is made, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration).

These settings are part of your store's Listing Settings. Update these configurations during onboarding through the Listing Settings step.

To configure Stock / Quantity settings:

1. Expand Fulfilled By.

2. For the Product Fulfilled By, select who fulfills (ships) the order:
   - Fulfilled by Merchant: Merchant fulfills order.
   - Fulfilled by Amazon: Amazon warehouse fulfills order.
   - Assign Fulfilled By Using Magento Product Attribute: A Magento attribute indicates who fulfills the order per product. If selected, then select the Magento attribute for Fulfilled by Attribute.

3. When complete, continue to the Catalog Search section.
If you are managing a store that is in "Active" or "Inactive" status, see Catalog Search.

Catalog Search settings enable you to set matching search parameters that help to map eligible Magento products with Amazon listings. Once mapped, Amazon activates actions related to pricing, quantity, overrides, and order and product synchronization.

Defining these values increases the potential for exact matches, minimizing the need to manually match product listings later. Adding the attributes as part of your onboarding Pre-Setup Tasks, Amazon Sales Channel has a higher potential for automatically matching your products during onboarding and syncs product data between Amazon and Magento after onboarding.

If you only create the Amazon ASIN attribute (without adding ASIN values per product), your Magento products may not automatically your Amazon listings will automatically. You can manually match your products through Store Review. However, manual matching does not create the data elements needed to share and sync your product data.

**Important:** If you manually matched a product and you need to update an ASIN, UPC, or other data element for the product, you would have to update the data in both places, in your Magento catalog and in your Amazon listing in your Amazon Seller Central account.

If you want to add attributes at this stage of onboarding, see Create Product Attributes for Amazon Matching.

These settings are part of your store's Listing Settings. Update these configurations during onboarding through the Listing Settings step.

**To configure Search Catalog settings:**

We recommend mapping these attributes and values if available. Completing this mapping is not required, but is beneficial for initial product matching and required for proper catalog syncing between Amazon and Magento.

1. Expand the Catalog Search section.

2. In the ASIN field, select the product attribute you created for the Amazon ASIN value.

   An ASIN (Amazon Standard Identification Numbers) is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.

3. In the EAN field, select the product attribute you created for the Amazon EAN value.

   The European Article Number (EAN) is a barcode standard, a 12 or 13-digit product identification code. Each EAN uniquely identifies the product, manufacturer, and its attributes; typically, the EAN is printed on a product label or packaging as a bar code. Amazon requires EAN codes to improve quality of search results and the quality of the catalog. You can obtain EANs from the manufacturer.

4. In the GCID field, select the product attribute you created for the Amazon GCIN value.
The Global Catalog Identifier (GCID) is an ID for products that do not have a UPC code or ISBN. Amazon’s Brand Registry allows you to register as a brand owner and create a unique ID for products.

5. In the **ISBN** field, select the product attribute you created for the Amazon ISBN value.


6. In the **UPC** field, select the product attribute you created for the Amazon UPC value.

The Universal Product Code (UPC) is a 12-digit bar code used extensively for retail packaging in United States.

7. In the **General Search** field, select the product attribute you want to use for a general search match.

This is an attribute that you can select to match Magento products to the appropriate Amazon listing. General search uses keyword searches from your catalog. As such, it is recommended to use a Magento attribute that carries relevant keywords, such as the product SKU or product name. General search may return many possible matches, and in such cases, you can select the appropriate Amazon listing from the possible matches. A common selection for this field is "Product Name."

8. When complete, continue to the **Product Listing Condition** section.

---

Onboarding: Product Listing Condition

**Step 2 Options** for **Listing Settings**
If you are managing a store that is in "Active" or "Inactive" status, see Product Listing Condition.

Amazon requires a product listing to have a defined condition. If all your products are new, you can select one of the Amazon condition options in the drop down list to represent all of your products as your global condition value. Standard Amazon conditions include:

- New
- Refurbished
- Used; Like New
- Used; Very Good
- Used; Good
- Used; Acceptable
- Collectible; Like New
- Collectible; Very Good
- Collectible; Good
- Collectible; Acceptable

However, if your catalog contains products in different conditions (New, Used, Refurbished, etc.), you must select the Assign Condition Using Product Attribute option. This setting allows you to map your Magento condition attribute and values to your Amazon listing's conditions.

During Pre-Setup Tasks, it was recommended that you create a Magento product attribute for a product's condition. If you offer products in various conditions and you have not created a condition attribute, see Onboarding: Create a product attribute in Magento. Once the condition attribute is created, you can assign a condition value to each of your products in your Magento catalog.

These settings are part of your store's Listing Settings. Update these configurations during onboarding through the Listing Settings step.

To configure Product Listing Condition settings:

1. Expand the Product Listing Condition section.
2. For Listing Product Condition, select an option.
- **Standard Amazon condition value**: Select one of the standard Amazon conditions to use as your global condition value for all of your Magento products.

- **Assign Condition Using Product Attribute**: Select this option if your Magento catalog contains products in various conditions. When this option is selected, the **Condition Attribute** field enables and is required.

3. For **Condition Attribute**, select the Magento attribute to map values to each Amazon condition attribute. You may have created the attribute during pre-setup tasks. When selected, a field for each of the standard Amazon conditions displays. Map Magento attribute values to each Amazon condition.

- If your products fall into only one condition, you can map to that single Amazon condition, leaving the others blank.

- If you have products that fall in the Used or Collectible category but you do not distinguish further, you can map to a single Used or Collectible Amazon category and leave the other similar options blank. All your Used or Collectible conditions will map to the single Amazon Used or Collectible category by default.

- You can also enter additional text to describe your conditions.

For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New: Used, Very Good: Used; Good: or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to "--Select Option--." You'll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition.

This section is the final section of the **Listing Settings** step.
# CHAPTER 46: Amazon Sales Channel Onboarding

### Product Listing Condition

Control what condition to list your products

<table>
<thead>
<tr>
<th>Listing Product Condition</th>
<th>Assign Condition Using Product Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition Attribute</td>
<td>Amazon Condition</td>
</tr>
<tr>
<td>New Condition</td>
<td>New</td>
</tr>
<tr>
<td>Refurbished Condition</td>
<td>Refurbished</td>
</tr>
<tr>
<td>Used; Like New Condition</td>
<td>— Select Option —</td>
</tr>
<tr>
<td>Used; Very Good Condition</td>
<td>Used</td>
</tr>
<tr>
<td>Used; Good Condition</td>
<td>— Select Option —</td>
</tr>
<tr>
<td>Used; Acceptable Condition</td>
<td>— Select Option —</td>
</tr>
<tr>
<td>Collectible; Like New Condition</td>
<td>— Select Option —</td>
</tr>
<tr>
<td>Collectible; Very Good Condition</td>
<td>Collectible</td>
</tr>
<tr>
<td>Collectible; Good Condition</td>
<td>— Select Option —</td>
</tr>
<tr>
<td>Collectible; Acceptable Condition</td>
<td>— Select Option —</td>
</tr>
</tbody>
</table>

Optional text to describe condition (1,000 characters maximum).

Optional text to describe condition (1,000 characters maximum).

Optional text to describe condition (1,000 characters maximum).

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Optional text to describe condition (1,000 characters maximum).
> **Continue to Step 3 of Onboarding**

**Onboarding: Listing Rules**

**Step 3 of 7** for **Onboarding Amazon Sales Channel**

If you are managing a store that is in "Active" or "Inactive" status, see Listing Rules.

Listing Rules define the rules to determine which products Amazon Sales Channel will publish to your Amazon Marketplace. These rules provide many options to create simple to complex rules to include or exclude products as listings. Each rule consists of conditions that set the requirements for product listing eligibility.

Your listing rules are continually synchronized with your Magento catalog. When you add new Magento products that meet eligibility requirements set by your listing rules, the products will automatically process for listing on Amazon.

- If you want all of your products to be published to an Amazon listing, do not define any conditions for your listing rules.

- If you want to limit which of your catalog products that will be published to an Amazon listing, you will define your listing rule conditions in this step of onboarding. Defining the conditions for your Amazon listing rules follow the same logic and process as defining the conditions for Cart Price Rules in Magento.

- If your listing rules exclude a product, the eligibility status for that product changes to Ineligible. Ineligible products will not be published to Amazon.

- If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. Amazon listings can be manually removed when managing listings.

Changes to quantity and eligibility status impact all listings that share the Amazon Seller SKU in marketplaces which exist for stores selling in the same region (as defined in the Amazon Marketplace field during Store Integration) will also be impacted. However, a change to a shared Amazon Seller SKU in one region will not affect the product's Amazon listings in a different region (as defined during Store Integration).

During onboarding, your listing rules will be applied to your catalog products. You can review ineligible listings on the Ineligible tab in the Store Review step.

**To configure Listing Rules settings:**

1. Tap Listing Rules.

2. For Website, select an option.
The options in this drop-down are dependent on the websites you have set up in your Magento configuration. Select the website to represent which website to have eligible products listed on Amazon. Only one website can be selected, as each website requires a unique Amazon store created in Amazon Sales Channel.

3. Define your desired conditions for the eligibility of products to be listed on Amazon.

See Example: Define a Condition.

Important! When you continue to Listing Preview (step 4), the option you selected in the Website field locks for this integration. To change the website after continuing to step 4, you must exit this store integration and begin a new one.

See Listing Rules.

Continue to Step 4 of Onboarding

Onboarding: Listing Preview

Step 4 of 7 for Onboarding Amazon Sales Channel

Important! Once you continue to the Listing Preview (step 4), you cannot change the website selected in your listing rules (step 3) for this integration. To change the website after leaving step 3, you must exit this store integration and begin a new one.

At this step of onboarding, you have created your listing rules that determine which of your Magento catalog products are eligible to be listed on Amazon.

Your current Amazon listings are compared against your rules, based on the conditions you defined. You can then review which products will move to an ineligible status based on your
current Amazon Seller Central account, which products will move from an ineligible state back to an eligible state, and which products will be New Amazon Listings and added to your Amazon listing from your eligible Magento catalog.

Listing Preview allows you to preview your potential Amazon listings and make any necessary adjustments to your listing rules. If you need to adjust your listing rules, click Listing Rules in the progress bar to return to the listing rules step.

Your potential Amazon listings will populate on the Listing Preview screen in one of three tabs:

- **Ineligible Listings**: Products listed on this tab are not eligible for Amazon listing based on your current listing rule settings.

  Ineligible products will not be published to Amazon. If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. To manually remove a listing, see Ending an Amazon Listing.

  Products that are not eligible by Amazon requirements are not listed here. Those products are listed on the Inactive Listings tab.

- **Eligible Listings**: Products listed on this tab are eligible for Amazon listing based on your current listing rule setup and are eligible by Amazon requirements. This tab includes your existing Amazon listings that will import (if you have the Import Third Party Listings field set to "Import Listing" in the Listing Settings step).

- **New Listings**: Products listed on this tab include your Magento catalog products that are newly eligible for Amazon listing based on your current listing rule setup and will create new Amazon listings.

See Listing Preview for column descriptions.
Listing Preview Workflow

Onboarding: Order Settings

If you are managing a store that is in "Active" or "Inactive" status, see Order Settings.

Order Settings define how Amazon orders are imported into and processed in Magento.

Beginning when you integrate Amazon Sales Channel with your Amazon Seller Central account during onboarding, Amazon orders import and create new orders in Amazon Sales Channel. Amazon orders are imported and create new orders when the Amazon sets the order status to "Unshipped." Orders that existed in Amazon in any status other than "Unshipped" prior to your store's integration will not import.

When an order is created on Amazon, it is not immediately imported into Amazon Sales Channel. Amazon assigns a "Pending" status to newly created orders. Once Amazon verifies the order and payment method, Amazon changes the order's status to "Unshipped." This status change triggers Amazon Sales Channel to import the order and create a corresponding order. Amazon Sales Channel creates a matching order that corresponds to the Amazon order. Orders created in Amazon Sales Channel display and can be managed in the Orders tab in Amazon Sales Channel Home.
To configure Order Settings:

1. Tap **Order Settings** in the onboarding progress bar.

2. For **Import Amazon Orders** (required), choose an option in the drop-down:
   - **Disabled**: Select this option if you do not want to create corresponding orders in Magento when new orders are received from Amazon. When this option is selected, all other fields on this screen are disabled.
   - **Enabled**: Select this option if you want to create corresponding Magento orders when new orders are received from Amazon. Magento orders are created based on Amazon status and stock levels.

   "Enabled" must be selected to manage Amazon orders in Amazon Sales Channel. When "Disabled" is selected, your Amazon orders will display in the Orders tab but will not have a corresponding Magento order number and cannot be managed in Amazon Sales Channel. Information for these orders is for review only. You must manage these orders in your Amazon Seller Central account.

3. For **Import Amazon Orders Into Magento Store** (required), select which Magento Store the Amazon orders will be associated with when they are created in the Magento Order grid. The list of options in this drop-down is dependent on the Magento stores you have set up in your configuration. See Stores.

4. For **Customer Creation**, select an option in the drop-down. Options:
   - **No Customer Creation (guest)**: Select this option if you do not want to create a customer account in Magento using the imported customer data from the Amazon order. When selected, this option tells Magento to process an imported Amazon order the same way it processes a guest checkout in Magento.
   - **Build New Customer Account**: Select this option if you want to create a New Customer Account in Magento using the customer data imported with the Amazon order. Selecting this option builds your customer database from your Amazon orders.

5. For **Order Number Source**, select an option in the drop-down. Options:
   - **Build Using Magento Order Number**: Select this option if you want to create a unique Magento order number for the corresponding Amazon order using the Magento incrementally-assigned order ID.
   - **Build Using Amazon Order Number**: Select this option if you want to create the Magento order number using the corresponding Amazon-assigned order number.

   Once an order is imported, the Amazon Order Number and the Magento Order Number display in the Orders tab.

6. For **Pending Orders** (required), select an option in the drop-down. Options:
- **Do Not Reserve Quantity**: Select this option when you do not want your Magento stock quantity affected by your Amazon orders. Select this option if you use Amazon for your fulfillment process (FBA). When this option is selected and you receive an Amazon order, the quantity ordered will not affect your Magento stock quantity.

- **Reserve Quantity**: Select this option when you want the order quantity in the Amazon order to be "reserved" in your Magento stock quantity. When this option is selected and you receive an Amazon order, the quantity ordered will "reserve" in your Magento stock quantity to prevent your Magento stock from "over selling."

Remember, Amazon orders do not import into and create new orders in Magento until Amazon verifies the order and payment method changes the order status to "Unshipped."

7. **For Order Status** (required), select an option from the drop-down. Options:

- **Default Order Status**: Select this option when you want newly created orders imported from Amazon to be assigned your defined default order status for new orders. The default status for new orders (unless you have created a custom order status for new orders) is "Pending." See Processing Orders.

- **Custom Order Status**: Select this option when you want newly created orders imported from Amazon to be assigned a status other than the default. When this option is selected, the Processing Order Status field enables for you to select the status you want to use for newly created orders imported from Amazon.

- **Processing Order Status**: Select an option in the drop-down. The options that display in this field are based on the default status options in Magento. See Order Status. You can also create a custom order status to display here for selection. To create a custom order status, see Custom Order Status.
Continue to Step 6 of Onboarding

For information on Magento order creation based on Amazon and inventory status, see Order Settings.

Onboarding: Pricing Rules

Step 6 of 7 for Onboarding Amazon Sales Channel

If you are managing a store that is in "Active" or "Inactive" status, see Pricing Rules.

Price rules are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the price rules for a store during setup in the Amazon Stores tab in Amazon Sales Channel Home. Tap the store's name in the store list to display the store's onboarding progress. Tap Pricing Rules in the progress bar.

There are two types of pricing rules:

- **Standard Pricing Rule**
- **Intelligent Repricing Rule**

You can add pricing rules for your Amazon listings. Price rules can be used to automatically adjust your listing prices, based on a set of defined conditions. Price rules are triggered and calculate your adjusted price before your product is listed on Amazon.

The price source for your Amazon listings is defined in the Magento Price Source field in your Listing Price settings. Any adjustment calculations defined in the pricing rule use price source as the starting value.

Amazon Sales Channel gives you the ability to set pricing rules, these pricing rules allow you to set your Amazon Listing price different than your Price Source. Additionally, you can stack multiple rules that will work together to adjust your price.

A pricing/repricing rule requires three sets of information during its setup:

- **Pricing Rule General Settings**: Defines the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.
- **Pricing Rule Conditions**: Determine which products will be eligible for the price rule.
- **Pricing Rule Actions**: Define the adjustment calculations that will be applied to the price source to determine the listing price.

You can create standard pricing rules that will automatically adjust your Amazon listing price relative to the selected Magento Price Source. This feature allows you to manipulate your Amazon prices in a way that is very similar to Magento's Catalog Price Rules. You can create
complex rules that automatically change prices for specific products, products inside of specific categories, or products with specific attributes. You can complete traditional settings and reprice your products to increase or decrease based on a fixed amount or a percentage.

Another powerful tool is the Intelligent Repricing feature that will adjust your Amazon listing price based on competitor Buy Box Price or Lowest Competitor Price. Similar to Magento’s Catalog Price Rules, this advanced feature allows you to manipulate your Amazon prices by creating complex rules that allow you define the scope for a price change for specific products, products inside of specific categories, or even with specific product attributes.

Using intelligent repricing you can adjust your products listing prices on Amazon, based on competitor’s pricing. Amazon Sales Channel has built in safeguards for you to set to protect margins or avoid matching the prices of a merchant with low feedback. Using intelligent repricing rules, Amazon listing prices can be automatically manipulated as a fixed or percentage amount (up or down) or even synchronized to the Buy Box or Lowest Price on a per item basis. Rules can even be stacked to provide unlimited flexibility.

Pricing rules determine if your product is listed on Amazon using your defined Price Source or if the price is automatically adjusted before listing on Amazon, based on defined conditions for the rule.

You can control important aspects of rules, such as active/inactive status, website eligibility, optional date ranges, and optional priority levels (used for rule stacking).

For example, you can define and set the conditions for a price rule that, when the conditions are met, automatically adjust your listing price before it is sent to Amazon.

**To configure your Pricing Rules:**

1. On the Pricing Rules screen during onboarding, tap **Add New Pricing Rule**.
2. Complete the **General settings** for the rule.
3. Complete the **Price Rule Conditions** for the rule.
4. Complete the **Price Rule Actions** for the rule.

**Pricing Rule Sections**

<table>
<thead>
<tr>
<th>SECTION</th>
<th>IN THIS SECTION, YOU WILL:</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Settings</td>
<td>Define the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.</td>
</tr>
<tr>
<td>Pricing Rule Conditions</td>
<td>Define which of your catalog products are eligible for the pricing rule.</td>
</tr>
<tr>
<td>Pricing Rule Actions</td>
<td>Define the adjustments applied to the price source to calculate the listing price.</td>
</tr>
</tbody>
</table>

> Continue to the **Price Rule General Settings** section

**Onboarding: Price Rule General Settings**
Step 6 Options for Pricing Rules

If you are managing a store that is in "Active" or "Inactive" status, see Price Rule General Settings.

Define the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.

To complete the Price Rule General Settings section:

1. For Rule Name (required), enter the name for the rule.
   This is for your internal identification purposes only. The more descriptive the rule name, the better.

2. For Description, enter a detailed description of your rule.
   This could include information on the products that qualify, the active dates, the formula for calculating your adjusted price, or any other information you'd find useful if you ever needed to modify the rule.

3. For Status, select an option:
   - **Active**: Select this option if you want the pricing rule to apply to your eligible products and adjust your listing pricing before publishing to Amazon.
   - **Inactive**: Select this option if you do not want the pricing rule to apply to your eligible products. This option will most likely be used when modifying a pricing rule or turning it off after a limited promotion.

4. For From and To, enter a beginning and ending date for the pricing rule. You can also tap the calendar icon to select a date from the dynamic calendar. This automatic start and stop option is beneficial when setting up limited-time or seasonal promotions with definite begin and end dates.

5. For Priority, enter a numerical value for the rule's priority. Priority value equal to 1 is the highest priority. When you have multiple active pricing rules, you can use priority to determine which rule is applied first. This field is required to use the Discard Subsequent Rules feature.

6. For Discard Subsequent Rules, select an option:
   - **Yes**: Select this option if you do not want any other pricing rules that may apply to a product to be applied. Discarding subsequent rules means that, in the event that multiple pricing rules apply to the same product, only the pricing rule with the highest defined priority will be applied to a qualifying product. This prevents multiple pricing rules from stacking and providing unintended additional discounts.
- **No**: Select this option if you want to allow multiple pricing rules to apply to the same product. This could result in stacking and providing multiple discounts applied to your listing price.

To discard subsequent rules, a pricing rule must use priorities which are set in the **Priority** field.

When complete, continue to the **Price Rule Conditions** section.

See **Pricing Rules General Settings**.

---

### Onboarding: Price Rule Conditions

**Step 6 Options** for **Pricing Rules**

If you are managing a store that is in "Active" or "Inactive" status, see **Price Rule Conditions**.

Conditions determine which products will be eligible for the price rule. Defining the conditions for your Amazon pricing rules follow the same logic and process as defining the conditions for **Cart Price Rules** in Magento. If your price rule applies to all products in your Magento catalog, then leave this section blank.

**Example: To build a price rule condition**

This process can be simple or detailed, depending on your catalog setup. You can set up your conditions so that when "ALL" or "ANY" of the define conditions are either "TRUE" or "FALSE" for a product, then the product is eligible for the pricing rule to be applied.

Conditions are based on existing product attribute values. To apply the rule to all products, leave the conditions section blank.
If you want to define a condition based on a specific product attribute, the **Use for Promo Rule Conditions** field for the attribute must be set to "Yes." The field is located on the **Storefront Properties** screen for the attribute.

**Condition - Line 1**

The condition in this example will define a rule that will apply a 25% discount to all products that are defined in the "Books" category.

The rule statement has two bold links, which when clicked, display the options for that part of the statement. If you save the condition without making changing a bold option, the rule applies to all your products.

- Click the **ALL** link, and chose either “ALL” or “ANY.”
- Click 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**:

1. Click the **Add** (⊕) button at the beginning of the condition line to display available attributes on which the condition function. Select an attribute on which to base the condition, such as a conditions combination or a product attribute.

   - **Conditions Combination**: Selecting this option allows you to create an additional set of "All/Any" and "True/False" conditions inside the existing set.

   - **Product Attribute**: The product attributes in this drop down is dependent on the setup of the attribute. For an attribute to display in the list, it must be configured to be used in promo rule conditions. See the Use for Promo Rule Conditions field in **Product Attributes**.
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 selected condition is "Category.”

![Product Attribute Selection](image)

**Condition Line 2, Part 2**

The selected condition displays in the statement, followed by two more bold links. The options differ depending on the product attribute you select.

Once you set the attribute, it cannot be changed. To change the attribute, you must delete the line and add the new attribute. You can delete a condition line by clicking the **Delete** button at the end of the line.

b. Click the **is** link, and choose the comparison operator that describes the condition for products to meet. For this example, the comparison operator is "is." The available options depend on the attribute selected in the previous step and may include different comparison options such as matching values, not including or including at least one of a value, and greater than, equal to, and less than a numerical amount. In this example, the options are “is” and “is not.”

c. Click the **... “more”** link, and choose the attribute value upon which the condition is based. The options displayed depend on the attribute's setup. You may be asked to select an option from a drop-down, or you may need to enter text or numerical values for the condition. For this example, the field displays blank. To select your category(ies) for the rule, click the chooser icon (カテゴリーを選択するアイコン) to display your selection options. This rule is for Books, click the Books checkbox. The category number populates in the field. Click the green checkmark icon (緑のチェックマークアイコン) to accept your category selection(s).

![Condition Line 2, Part 3](image)
This example condition is complete. As stated, this condition means that any product in your Magento catalog that has a defined category of “Books” (4) is eligible for this pricing rule. You can add more condition lines to further narrow your eligible products.

2. To add another condition line to the statement, return to step 1 and repeat the process until all desired conditions are complete.

You can delete a line of the condition statement at any time by clicking the Delete (🗑️) button at the end of the line.

When complete with your price conditions, continue to the Pricing Rule Actions section.

Onboarding: Price Rule Actions

Step 6 Options for Pricing Rules

If you are managing a store that is in "Active" or "Inactive" status, see Price Rule Actions. Price Rule Actions define the adjustment calculations that will be applied to the price source to determine the listing price.

To complete the Price Rule Actions section for a Standard Price Rule:

1. For Rule Type, select "Standard price rule" in the drop-down.

2. For Price Action, select an option in the drop-down.
   - Decrease By: Select this option if you want the defined price source value to be decreased before listing to Amazon.
   - Increase By: Select this option if you want the defined price source value to be increased before listing to Amazon.

3. For Apply, select an option:
• **Apply as percentage**: Select this option if you want the defined price source value adjusted by a percentage.

• **Apply as fixed amount**: Select this option if you want the defined price source value adjusted by a fixed amount.

4. For **Adjustment Amount** (required), enter the numerical value for the price adjustment.

   If you selected “Apply as percentage” in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

   If you selected “Apply as fixed amount” in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a $25 fixed adjustment).

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

   See **Price Rule Actions**.

---

**To complete the Price Rule Actions section for an Intelligent Repricing Rule:**

Define the Rule Type in the **Select Price Rule Type** section.

1. For **Rule Type**, select “Intelligent repricing rule” in the drop-down.

2. For **Competitor Price Source**, select an option in the drop-down.

   • **Use "Buy Box" Price**: Select this option when you want to adjust your Amazon pricing based on the Amazon Buy Box seller price. A Buy Box price exists when multiple sellers on Amazon offer the same product. Amazon defines the Buy Box seller based on performance requirements. Merchants seek to win the Buy Box seller status and offers maximum visibility of your product listings.

   • **Use Lowest Competitor Price**: Select this option when you want to compare and adjust your listing price to competitor pricing for the same product. When this option is selected, the **Minimum Positive Feedback** and **Minimum Feedback Count** fields enable.

3. If enabled, select an option for **Minimum Positive Feedback**.
- **All Competitor's Prices**: Select this option when you want to compare and adjust your pricing based on all competitor prices for the same product.

- **Minimum 80/90/95/98% positive feedback**: Select this option when you want to limit the competitors to whom you compare and adjust your pricing for the same product. This will narrow down your competitors further by requiring their listing to have a minimum of the chosen percentage of positive feedback and then use the lowest price of that subset of competitors.

4. If enabled, enter a numerical value for **Minimum Feedback Count**.

This is an optional numerical value that further narrows down the competitive pricing. For example, if a merchant has a 95% positive feedback rating, but only has a feedback count of 20, this might not be a competitor you would want to be included to modify your pricing against. However, if you put a value of 1000, it would require that the merchant have 95% positive feedback and a minimum of 1000 merchant reviews.

You might use these competitor pricing and feedback options to avoid basing your pricing against a competitor who has poor feedback and is selling a lower quality product.

See **Price Rule Actions**.

---

![Price Rule Actions](image)

*Onboarding: Intelligent Price Rule Type Section*

Define your condition variances in the **Competitor Conditional Variances** section.

1. For **Conditional Variance**, select an option in the drop-down.

   - **Use all competitor's product conditions**: (Default selection) Select this option if you want your product to compare against any available condition (if a match does not exist for the condition you are listing).

   - **Use Only Matching Competitor’s Product Condition**: Select this option if you want your product to compare only against competitor's products in the same condition. If no match exists, the product will price at the Price Source.

   - **Apply Variance (if competitor’s product condition differs)**: Select this option to first try to compare against your matched product condition. If no matching condition exists, a variance (as a percentage) will be applied relative to your product condition and the lowest competitor's condition.
When the Apply Variance feature is selected, additional variance fields display for each of your Amazon conditions. This feature allows you to utilize intelligent repricing rules when you offer products which are in a different condition than your competitors. To understand the calculation behind conditional variance, you will need to first understand that all variance is determined from a base match price. Conditional variance options only displays when your listing settings for Condition are set to map condition values using a Magento product attribute. For all mapped conditions, you can denote a variance percentage of 1-100. The exception is collectibles, in which case a percentage greater than 100 may be applied.

See Price Rule Actions.

### Onboarding: Intelligent Price Competitor Condition Variance Section

Define your pricing adjustment in the Price Adjustment section.

1. For Price Action, select an option:
   - **Decrease By**: Select this option if you want the defined price source value to be decreased before listing to Amazon.
   - **Increase By**: Select this option if you want the defined price source value to be increased before listing to Amazon.
   - **Match Competitor Price**: (Intelligent repricing rule only) Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the Apply and Adjustment Amount fields are removed.

2. For Apply, select an option:
- **Apply as percentage**: Select this option if you want the defined price source value adjusted by a percentage.

- **Apply as fixed amount**: Select this option if you want the defined price source value adjusted by a fixed amount.

3. **For Adjustment Amount** (required), enter the numerical value for the price adjustment.

   If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

   If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a $25 fixed adjustment).

   See **Price Rule Actions**.

---

**Onboarding: Intelligent Price Adjustment Section**

Define your lowest price setting in the **Floor Price** section.

1. **For Floor Price Source**, select an attribute from the drop-down.

   Select your Magento attribute which will indicate your relative floor limit. For example, if you don’t want your product listing price to go below the Cost of your item, you would choose the Cost attribute.

2. **For Floor Price Action**, select an option.

   - **Decrease By**: Select this option if you want the defined floor price source value to be decreased before listing to Amazon.

   - **Increase By**: Select this option if you want the defined floor price source value to be increased before listing to Amazon.

   - **Match**: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Floor Adjustment Amount** fields are disabled.

3. **The Apply** field defaults to "Apply as percentage."

4. **For Floor Adjustment Price**, enter the numerical value for the percent to adjust your floor price source.

   See **Price Rule Actions**.

   In this example, the floor price is set to be 3% above the cost of the item.
Select your optional highest price setting in the **Optional Ceiling Price** section.

1. For **Ceiling Price Source**, select an attribute from the drop-down.

   Select your Magento attribute which will indicate your relative ceiling limit. For example, if you don’t want your product listing price to go above the MSRP of your item, you would choose the Manufacturer’s Suggested Retail Price attribute.

2. For **Ceiling Price Action**, select an option.

   - **Decrease By**: Select this option if you want the defined ceiling price source value to be decreased before listing to Amazon.
   - **Increase By**: Select this option if you want the defined ceiling price source value to be increased before listing to Amazon.
   - **Match**: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Ceiling Adjustment Amount** fields are disabled.

3. The **Apply** field defaults to "Apply as percentage."

4. For **Ceiling Adjustment Price**, enter the numerical value for the percent to adjust your floor price source.

   See **Price Rule Actions**.

   In this example, the ceiling price is set to be 2% below the MSRP of the item.

When complete, tap **Save Pricing Rule**.

> **Continue to Step 7 of Onboarding**
Onboarding: Store Review

**Step 7 of 7** for Onboarding Amazon Sales Channel

Store Review is the final step of the onboarding process. At this stage of onboarding, Magento has connected to Amazon, requested your listing information, and compared your Amazon listings to your listing settings, rules, overrides, and conditions. All listings are categorized based on these settings.

**To complete your Store Review and Complete your Setup:**

1. See the table below for all listing descriptions and options.
2. Review your listings on their appropriate tabs.
3. Update listing status by modifying your configurations and listing rules. You have a couple methods for updating listings:
   - Use the actions available on each tab for your listings to review and edit your listings.
   - Edit your store's listing settings through previous Onboarding steps.
4. When you are satisfied with your listings, tap **Complete Setup**.

You can edit these settings at any time after completing onboarding setup. Access the store integration through the Amazon Sales Channel Home.

Your Amazon Sales Channel store setup completes, your listing information is published to your Amazon Seller Central account, and the status of the new store changes "Active" on the Amazon Sales Channel Home screen.

In this final step, you need to review each of your listings and modify as needed to ensure your listings are published as you want. Each tab displays based on their status according to your current settings. If you want to update a listing, match it to your Magento catalog, to change its publish status, you can use the available actions on each screen as described below.

When your listings display in the status you wish and you are complete with adjusting your store, listing, and rules settings, you are ready to tap **Complete Setup**. Your store setup will complete, your listings and data will transmit and publish to Amazon. After setup, you can manage your stores, listings, and orders from the Amazon Sales Channel Home screen.

The different tabs on the Store Review screen allow you to review your Amazon listings before completing your Amazon Sales Channel store setup.
### Store Review Tabs

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete</td>
<td>Displays your Magento catalog products that meet your defined listing settings but are missing information required by Amazon for a listing.</td>
</tr>
<tr>
<td>New Third Party</td>
<td>Displays your existing Amazon listings (based on information received from Amazon) that are not matched to a product in your Magento catalog.</td>
</tr>
<tr>
<td>Ready to List</td>
<td>Displays your catalog products that are ready to create new Amazon listings, but your store is not configured to automatically publish new listings. This tab is used to manually publish your new listings.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Displays your catalog products that have been published to Amazon, but Amazon has not approved the listing for Active status.</td>
</tr>
<tr>
<td>Active</td>
<td>Displays your Amazon listings that have been matched to a product in your Magento catalog, have been published to Amazon, and Amazon has approved for Active status.</td>
</tr>
<tr>
<td>Overrides</td>
<td>Displays your Amazon listings that meet the criteria for a defined override and to which the override has been applied. Overrides take priority over any other account setting.</td>
</tr>
<tr>
<td>Ineligible</td>
<td>Displays your existing Amazon listings that are no longer eligible, based on your defined listing settings.</td>
</tr>
<tr>
<td>Ended</td>
<td>Displays your Amazon listings that have manually been ended (removed) from Amazon.</td>
</tr>
</tbody>
</table>

Each tab differs slightly in the options available in the **Actions** drop-down, the **Select** (Action column) drop-down, and the default and available table columns. The workspace controls are the same and allow you to customize displayed data.

The **Actions** drop-down options can apply the selected action to all listings selected (checked), while options in the **Select** drop-down in the **Action** column applies the action only to the individual listing.
Incomplete

Listings that display on this tab include your Magento catalog products that meet your Amazon eligibility requirements as defined in your listing rules but are missing information required by Amazon before listing (example: the Amazon ASIN or a defined product condition).

In the Actions drop-down:

- **Re-attempt to auto match to Amazon listings**: Selecting this option initiates the automatic process for matching your Amazon listings data to your Magento catalog. If products are not automatically matching, revisit your Catalog Search options in your listing settings. If listings don't automatically match after updating your Catalog Search options, you can match products manually in the Update Required Info action.

In the Select drop-down in the Actions column:

- **Update Required Info**: Select this option if listings do not automatically match to your catalog. You can manually match catalog products to listings, manually assign an ASIN to a catalog match, or update a missing condition for listing. See Update Required Info.

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

See Incomplete Listings.

New Third Party

Listings that display on this tab include your existing Amazon listings that have not been matched to a product in your Magento catalog. To utilize listing management for quantity, pricing, handling time, and more, each of your Amazon listings must be assigned (matched) to a product in your Magento catalog. You have a few options to assign a listing to a product in your Magento catalog.

In the Actions drop-down:

- **Create New Catalog Product(s)**: Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See Creating and Assigning Catalog Products.

- **Attempt Automatic Match**: Select this option to prompt Amazon Sales Channel will automatically attempt to match the selected listings to your catalog based on your current Catalog Search options in your Listing Settings. If you modify your Catalog Search options, this action will allow you to attempt the matching process again.

In the Select drop-down:

- **Assign Catalog Product**: Select this option to manually match the listing with a product in your Magento catalog. See Creating and Assigning Catalog Products.
- **Create New Catalog Product**: Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See Creating and Assigning Catalog Products.

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

See New Third Party Listings.

### Ready to List

The Ready to List tab displays your Magento catalog meet your defined listing settings and are ready to publish to Amazon as a new listing.

The Ready to List tab only displays when your Automatic List Action field in Product Listing Actions is set to "Do Not Automatically List Eligible Products." This setting tells Amazon Sales Channel that any new Amazon listings must be published manually. You have a few options to manually publish a new listing to Amazon:

In the Actions drop-down:

- **Publish Product to Amazon**: Select this option to publish the catalog product to a new listing on Amazon. See Publishing a Ready to List listing.

In the Select drop-down in the Action column:

- **Publish On Amazon**: Select this option to publish the catalog product to a new listing on Amazon. See Publishing a Ready to List listing.

See Ready to List Listings.

### Inactive

Listings that display on this tab include your products that have been published to Amazon but are not active on the Amazon marketplace. Your listings could be inactive for a few different reasons. For example, you might not be eligible to list that particular brand. Inactive listings are dictated by Amazon’s listing standards and your Amazon Seller Central account permissions.

In the Actions drop-down:

- **End Listing(s) on Amazon**: Select this option to remove all selected listings from the Amazon marketplace. See Ended Listings.

- **Edit Listing Overrides**: Select this option to change the override settings for the listing. See Overrides.

In the Select drop-down in the Action column:
- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

- **Create Override**: Select this option to create a new override and apply it to this listing. See Creating Listing Overrides.

- **Edit Assigned ASIN**: Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See Edit Assigned ASIN.

- **Create Alias Seller SKU**: Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See Creating an Alias Seller SKU.

- **Switch to Fulfilled by Amazon/Merchant**: Select this option to change the fulfillment method associated to the order. See Fulfilled By.

- **End Listing**: Select this option to remove the listing from the Amazon marketplace. See Ended Listings.

  See Inactive Listings.

**Active**

Listings that display on this tab include your Amazon listings that are active on the Amazon marketplace and that have been matched to a product in your Magento catalog.

In the Actions drop-down:

- **End Listing(s) on Amazon**: Select this option to remove all selected listings from the Amazon marketplace. See Ended Listings.

- **Edit Listing Overrides**: Select this option to change the override settings for the listing. See Overrides.

In the Select drop-down in the action column:

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

- **Create Override**: Select this option to create a new override and apply it to this listing. See Creating Listing Overrides.

- **Edit Assigned ASIN**: Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See Edit Assigned ASIN.

- **Create Alias Seller SKU**: Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See Creating an Alias Seller SKU.
• **Switch to Fulfilled by Amazon/Merchant:** Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).

• **End Listing:** Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

See [Active Listings](#).

**Overrides**

Listings that display on this tab include your Amazon listings that meet the criteria for a defined override and to which the override has been applied. Overrides take priority over any other account setting.

In the **Actions** drop-down:

• **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down in the Action column:

• **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

• **Edit Overrides:** Select this option to change the override settings for the listing. See [Editing Overrides](#).

See [Overrides](#).

**Ineligible**

Listings that display on this tab include your Amazon listings that are no longer eligible to publish, based on your defined listing settings.

In the **Actions** drop-down:

• **End Listing(s) on Amazon:** Select this option to remove all selected listings from the Amazon marketplace. See [Ended Listings](#).

• **Edit Listing Overrides:** Select this option to change the override settings for the listing. See [Overrides](#).

In the **Select** drop-down:

• **View Details:** Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

• **Create Override:** Select this option to create a new override and apply it to this listing. See [Creating Listing Overrides](#).
- **Edit Assigned ASIN**: Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See [Edit Assigned ASIN](#).

- **Create Alias Seller SKU**: Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).

- **Switch to Fulfilled by Amazon/Merchant**: Select this option to change the fulfillment method associated to the order. See [Fulfilled By](#).

- **End Listing**: Select this option to remove the listing from the Amazon marketplace. See [Ended Listings](#).

See [Ineligible Listings](#).

### Ended

Listings that display on this tab include your Amazon listings that have manually been removed from Amazon.

In the **Actions** drop-down:

- **Publish Product to Amazon**: Select this option to republish the listing to the Amazon marketplace. See [Republish an Ended Amazon Listing](#).

In the **Select** drop-down in the Action column:

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

- **Publish Product to Amazon**: Select this option to republish the listing to the Amazon marketplace. See [Republish an Ended Amazon Listing](#).

- **Create Alias Seller SKU**: Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See [Creating an Alias Seller SKU](#).

See [Ended Listings](#).
Amazon Sales Channel Home

Amazon Sales Channel Home is your landing page when accessing your Amazon Sales Channel. Amazon Sales Channel Home behaves as a dashboard to view and manage your Amazon stores, orders, attributes, listing changes, and communication errors, using a tabbed page format.

**Amazon Sales Channel Home tabs**

- **Amazon Stores**: Review and access your created and linked Amazon stores. Tap on a store name to review detailed information through the store’s dashboard.

- **Orders**: View and manage orders submitted by customers through your Amazon store and Amazon Seller Central account. These orders may be reviewed, managed, and shipped through Magento. Any updates in status, ordered product, payments, cancellations, and shipments sync between Amazon and Magento.

- **Attributes**: View and manage linked Magento and Amazon attributes for your product catalog. Directly edit or create and link attributes directly through Magento to sync automatically with Amazon.

- **Listing Changes Log**: Review a log of changes in listings on Amazon by the Seller SKU, with captured details for the listing action such as updates to pricing and quantities, comments for the change, and more.
- **Communication Errors Log**: Review communication errors caught between Amazon and Magento. These errors track issues with data syncs for products and orders, invalid orders, missing data, and much more. Access your Amazon store to learn more and resolve the error.

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

**To access Amazon Sales Channel:**

1. On the Admin sidebar, tap **Marketing**.
2. Then under Channels, tap **Amazon**.

Amazon Sales Channel Home displays with the **Amazon Stores** tab displayed by default.

![Amazon Sales Channel Home: Amazon Stores tab](image)

**Workspace Controls**

Amazon Sales Channel Home have some common workspace controls including Filters, Default View, Columns, and Export. Not all pages will have the same control options.

![Amazon Sales Channel Workspace Controls Examples](image)

**Actions**

The Actions drop-down option displays a list of actions that are available to a user for a screen. When selected, the action is applied to all selected items. To apply an action to a specific item, mark the checkbox in the first column of each item and choose an option in the Actions drop-down.
For example, the Actions drop-down on the Attributes screen includes the "Re-import Product Attribute Values" action. Choosing this action will ping the corresponding Amazon Seller Central account and refresh the Magento data for each of the Amazon store items checked in the left-side column.

Filters
The Filters control displays options for narrowing the data displayed in the table. Filter options are based on the columns selected in the Columns control. Filter options only display for columns enabled in the Columns control.

Filters controls can include dynamic calendars to narrow data for specified dates, drop-down menus for columns that have pre-defined selections, and free-text fields that may contain custom data.

The example below shows the settings for filtering the list of orders to display only orders that meet the following criteria:

- Orders placed between 2/01/2019 and 2/07/2019, and
- Orders with a buyer named of "Smith," and
- Orders with a status of "Shipped."

When you have your filtering options set, tap Apply Filters to filter the data listed. Tap Cancel to exit the Filters control without applying.

Once you've applied filters to your data, Active Filters information will display. You can tap the icon to clear a specific filter option or tap Clear All to clear all applied filters.
Active Filters Example

View
The View control is based on the default columns for page, thus it is named the Default View. You can add or remove available columns using the Columns control. When you customize your columns, you can then save the view as a custom view in the View control.

When you have your columns added or removed from the page display:

1. Tap Default View and choose Save View As....
2. Enter a name for view.
3. Tap the arrow icon to save the custom view.

In this example, we added the Order Id column in the Column control and then saved it as a custom view. Notice that after we saved our custom view name, the name of the View changed from Default View to the name we entered.

You can toggle between the views by selecting the desired view in the View drop-down menu.

If you want to delete or change the name of your custom view, tap the pencil icon. You can then enter a different name, or you can tap the trash can icon to delete the custom view. The Default View cannot be deleted.

Columns
The Columns control allows you to add or remove columns of data from the page display. Each Amazon Sales Channel page has a preset combination of data columns, but most pages have additional columns available. If no additional columns are available, you can still remove default columns from display.

The example below shows a Columns control. The checked options correspond to the column headers that are displayed on the page.

- To add a data column to your page, check the checkbox.
- To remove a data column from your page, uncheck the checkbox.
Checkbox changes display immediately. If you make changes and exit the page, the page returns to the default column display. For changes you make regularly, you can save the columns changes as a custom view in the View control. Then you can toggle in the View control without having to add or remove columns manually.

You can tap **Reset** to set the options back to default settings, or you can tap **Cancel** to exit without your changes.

**Export**

The Export option allows you to export the displayed data to a data file than can be imported to a third-party software or separate database. Data exported is limited to the data displayed. You’ll want to make sure you add or remove columns if needed prior to using the Export control.

When ready to export your data, select an export format option and tap **Export**.

- CSV - a comma-separated value file containing plain text data
- Excel XML - an XML-based, spreadsheet data format (typically used for Excel users)

The generated data file saves automatically to your designated folder for downloads.
Export Control Example
Managing Stores

When accessing your Amazon Sales Channel, the Amazon Stores tab displays by default on Amazon Sales Channel Home. You can access Amazon Sales Channel Home by tapping **Marketing** in the admin sidebar. Then under Channels, tap **Amazon**.

The Amazon Stores tab provides a list of your Amazon stores along with some basic statistics and management options. Displayed statistics include each store’s status, date created, last updated, available management actions, and defined region. Management options (available in the **Select** drop-down in the Actions column) include:

- **Manage Store**: The action for this option is dependent on the status of the store selected.
  
  If the store is in Active or Inactive status, selecting this option displays the store’s dashboard giving you access to the store’s data, revenue and order information, and listing and order settings.
  
  If the store is in Setup status, selecting this option displays the Store Review step for the store's setup process, where you can review and modify your stores settings, listing and order settings, and pricing rules before completing setup.

- **Change to Active/Inactive**: Select this option if you want to change the status of the store selected. This feature allows you to control order and listing activity at the Amazon regional level, because each Amazon store has a defined region during setup.

  Changing an Inactive store to Active status will activate listings and order activity for the store, using the stores current setup (listing settings, price rules, overrides, etc.)

  Changing an Active store to Inactive status will suspend listings and order activity for the store. An Inactive store will retain all settings and listings, but will temporarily stop the synchronization of pricing, quantity, and order management until the store is changed to Active status. This feature allows you to control your store activity at the Regional level without the need to recreate or reintegrate your Amazon store or the loss of historical order and sales data.

- **Delete Store**: Select this option if you wish to delete an existing Amazon store and its integration settings with your Amazon Seller Central account. Deleting the account will remove the store from Amazon Sales Channel, along with all account settings, listings, logs and other information related to this store. The account cannot be retrieved after deletion.

  To change the website assigned to the store during integration, you must delete the store and add the store again with the different website through the onboarding process.

You will notice some **workspace controls** that are common throughout the Amazon Sales Channel.

One workspace control unique to the Amazon Stores tab is the **Setup Amazon Store** button. When you want to set up a new Amazon store, tap this button and begin the onboarding for the new store.
### Amazon Stores

**Amazon Sales Channel Home**

Displays all Amazon stores with additional actions to setup a new Amazon store, delete an existing store, and more.

<table>
<thead>
<tr>
<th>Amazon Store Name</th>
<th>Region</th>
<th>Status</th>
<th>Created On</th>
<th>Last Updated</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Store Name]</td>
<td>[Region]</td>
<td>[Status]</td>
<td>[Created On]</td>
<td>[Last Updated]</td>
<td>[Actions]</td>
</tr>
<tr>
<td>[Store Name]</td>
<td>[Region]</td>
<td>[Status]</td>
<td>[Created On]</td>
<td>[Last Updated]</td>
<td>[Actions]</td>
</tr>
</tbody>
</table>

2 records found

20 per page 1 of 1

View User Guide

[Set up Amazon Store]
## Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Store Name</td>
<td>The name defined for each store during its setup.</td>
</tr>
<tr>
<td>Region</td>
<td>The region (defined during setup) in which your Amazon store sells. Example: United States, Canada, United Kingdom.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of your store. Options:</td>
</tr>
<tr>
<td></td>
<td>• In Setup: Store setup is incomplete and not available for sales activity. Accessing or managing the store opens in Onboarding steps.</td>
</tr>
<tr>
<td></td>
<td>• Active: Store setup is complete and verified with Amazon and is available for sales activity. To review revenue and update settings, see Store Dashboard.</td>
</tr>
<tr>
<td></td>
<td>• Inactive: Store setup is complete, but is not in use or available for sales activity. You may want to set to inactive to pause sales on Amazon. If active, sales revenue and additional settings save to update prior to activating. To review revenue and update settings, see Store Dashboard.</td>
</tr>
<tr>
<td>Created On</td>
<td>The date the Amazon store was created in Amazon Sales Channel.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The date of the most recent change to the Amazon store’s setup.</td>
</tr>
<tr>
<td>Actions</td>
<td>Lists available actions that can be applied to the store listed. Tap the Select drop-down and choose an option. Options:</td>
</tr>
<tr>
<td></td>
<td>Manage Store</td>
</tr>
<tr>
<td></td>
<td>Change To Active/Inactive</td>
</tr>
<tr>
<td></td>
<td>Delete Store</td>
</tr>
</tbody>
</table>

## Optional Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merchant Id</td>
<td>This is the code identifier assigned by Magento for the Amazon Sales Channel store when the store was created and integrated.</td>
</tr>
</tbody>
</table>
Amazon Store Dashboard

On the Amazon Stores tab in Amazon Sales Channel Home, you can tap any store name (in Active or Inactive status) to access the store’s dashboard.

The store dashboard is the primary location for you to view the activity for one of your Amazon stores. With your Amazon Seller stores added and integrated, all orders and sales track through your store data view. On the dashboard, you can view revenue, track trends, and review sales data for all listings. All listings and sales are further grouped and tracked by listing type, including active, inactive, in-progress, incomplete, and orders awaiting shipment.

You can also review and update your store settings, integration settings, listing settings, price rules, order settings, and more from the store dashboard. On the dashboard, tap one of your integrated stores. This store dashboard opens for stores in Active and Inactive status and displays data on sales, access for listings, and configuration options for the store.

The store dashboard includes the following sections of data and access to other information:

- **Store Data**: Displays sales data and links to your listings by status.
- **Revenue**: Displays a graphical representation for the store’s revenue for the last 7 or 30 days.
- **Most Recent Orders**: Displays the most recent orders that have been received from your Amazon listings association with the store.
- **I Want to See...**: Provides links to view and update your various store, listing, rules, and order settings.

Amazon Store Dashboard
If you select a store with the **In Setup** status, the Onboarding steps open with populated data saved for the store integration.

### Amazon Store Dashboard

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| **Store Data**           | Details about your store including lifetime sales, listings by status, and orders awaiting shipment. Tap the a link to view details: Options:  
  - Active Listings  
  - Inactive Listings  
  - In Progress Listing  
  - Incomplete Listings  
  - Orders Awaiting Shipments |
| **Revenue**              | A line graph of your sales revenue over a period of time. You can select to view either the data for last 7 days or the data for the last 30 days. The default view option is "Last 7 Days." You can tap in the drop-down to change the time period for the graph.  
  This graph displays the store data from only your Amazon Seller Central account. |
| **Most Recent Orders**   | A listing of the basic details for the most recent orders that have been placed in the Amazon store (through your Amazon Seller Central account). Data includes Purchase Date, Order Number, Status, Buyer’s Name, and purchase Grand Total. Tapping an order number will display the order details, similar to the *Magento Order View*. |
| **I Want to See...**     | Links to configurations and settings for the store:  
  - Manage Listings  
  - Listing Rules  
  - Pricing Rules  
  - Store Reports  
  - Store Integration Settings  
  - Listing Settings  
  - Order Settings |

### Store Integration Settings
After integrating your store, review and configure the integration settings store through the Amazon Store Dashboard. These settings display for Inactive and Active stores. Stores with the In Setup status can be configured through the Onboarding steps.

**To modify store integration settings:**

1. Tap a store name in the Amazon Stores tab in Amazon Sales Channel Home to display the store's dashboard.
2. On the store's dashboard, under the I Want To... header, tap Store Integration Settings.
3. For Email Address, update your preferred contact email address.
4. For New Store Name, update the descriptive name for your new Amazon Sales Channel store. This name displays on the Amazon Stores tab.

   This name is used as a Magento reference only and will identify the store in the list on the Amazon Sales Channel Home page. You will want to make it something your team can easily identify. For example, your Amazon store that sells in the United States region might be named “Amazon Store USA”.

5. The Amazon Marketplace setting cannot be updated.
6. Tap Save.

**Amazon Sales Channel Settings**

Amazon Sales Channel settings are defaulted during installation of the extension. These settings can be modified and are located in your stores configuration settings. These settings include:

- Whether or not to display the Revenue section on the store's dashboard.
- Intervals for clearing activity log history.
- Selection of the Cron source.
To modify your Amazon Sales Channel settings:

1. Tap **Stores** in the Admin sidebar. Then under **Settings**, tap **Configuration**.

2. Scroll down and tap **Sales Channels** and then **Global Settings**. The Sales Channel Settings screen displays.

3. For **Show Dashboard Chart**, select an option in the drop-down.
   - **Yes**: (Default) Select this option if you want the Revenue section to display on the store's dashboard. If set to "Yes," the Revenue section displays a graphical representation for the store's revenue for the last 7 or 30 days.
   - **No**: Select this option if you do not want the Revenue section to display on the store's dashboard.

4. For **Clear Log History**, select an option in the drop-down. Options:
   - **Once Daily**: Select this option to clear your store's activity history once daily.
   - **Once Weekly**: Select this option to clear your store's activity history once weekly.
   - **Once Monthly**: (Default) Select this option to clear your store's activity history once monthly.

5. For **Background Tasks (CRON) Source**, select "Magento CRON" in the drop-down. This tells Amazon Sales Channel to use your Magento Cron settings to determine communication and data sync intervals with Amazon Seller Central.

6. Tap **Save Config**.

![Amazon Sales Channel Global Settings](image)

*Amazon Sales Channel Global Settings*
Managing Attributes

Amazon and Magento both use a system of product properties, known as attributes, used to define a product. Attributes define the description, content, images, prices, and various data for your products.

Successful communication between Magento and Amazon requires that Magento attributes be correctly mapped to the corresponding Amazon attribute. When integrating with Amazon, you will link (or map) these Magento attributes to Amazon attributes. When complete, Magento can sync and maintain your Amazon listings with your Magento product catalog.

For example, imagine you have the same item in your Magento catalog and Amazon listings. One attribute for the product might be the listing price of the item. The name for the listing price in Magento might be named "Price," while the listing price for Amazon might be named "ListingPrice." You'll need to tell Magento that when communicating with Amazon, the Magento attribute named "Price" is the same as the Amazon attribute named "ListingPrice." This process is called managing attributes, and includes creating new and editing existing attributes. Making sure that attributes are properly matched will ensure correct communication between Magento and Amazon.

Once attribute matching is set up, Magento can communicate product information back and forth with Amazon. If you have Amazon product listings, Magento can import your Amazon products and details into your Magento catalog, allowing you to manage your Amazon listings from a single, central catalog of products.

The Amazon Sales Channel allows you to access, review, create, and manage attributes, as needed. If you add a new attribute to your Magento catalog, you may need to update those values across all products. For more information on Magento attribute sets and values, see Product Attributes.

Attribute Options

Access and view all linked attributes through the Attributes tab on the Amazon Sales Channel Home screen. View this page through the Amazon Sales Channel Home dashboard. Through this page you can:

- Create and edit attributes
- Review Amazon attribute values
# Attribute Management

## Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region</td>
<td>The region for sales activity defined in the Amazon Marketplace when the Amazon store was set up in the Amazon Sales Channel.</td>
</tr>
<tr>
<td>Amazon Attribute Name</td>
<td>The name of the attribute defined in the Amazon Seller Central account.</td>
</tr>
<tr>
<td>Product Catalog Attribute Code</td>
<td>The name of the Magento attribute that is matched with the Amazon attribute name. If the attribute is not matched to a Magento attribute, this field will be blank.</td>
</tr>
<tr>
<td>Overwrite Magento Values</td>
<td>If set to &quot;Enabled&quot;, the Amazon attribute value will overwrite the corresponding Magento attribute value. This setting only applies when a Magento attribute exists and is matched with the Amazon attribute. Options: Disabled / Enabled</td>
</tr>
<tr>
<td>Is Active</td>
<td>If set to &quot;Enabled&quot;, the Amazon and Magento attributes will update stay in sync.</td>
</tr>
<tr>
<td>Actions</td>
<td>Links to the Create / Edit Attribute screen for the selected attribute. If a Magento attribute does not exist, the Create Attribute link displays. If a Magento attribute is matched to the Amazon attribute, the Edit Attribute link displays.</td>
</tr>
</tbody>
</table>

## Optional Column

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>The numerical identifier for the Amazon attribute.</td>
</tr>
</tbody>
</table>
Creating and Editing Amazon Attributes

You may need to create or update Amazon and Magento attributes as you sell through Amazon and update your stores. Review the current Amazon attributes and linked Magento attributes through the Managing Attributes tab of the Amazon Sales Channel Home dashboard. The Actions column provides actions to either create a new Magento attribute for an unlinked Amazon attribute or edit an existing linked attribute. If an attribute is linked, you have an

As you create and update attributes, you may want to verify the attribute values for Magento and Amazon products. These values may differ if you do not sync and import values from Amazon. To review Amazon values for these attributes, see Reviewing Amazon Attribute Values. If you want to change those values, continue through the following instructions to create new attributes or edit existing attribute links between Amazon and Magento.

To create an attribute:

These steps create a new Magento attribute and links it to the selected Amazon attribute. Depending on configurations, the values may start syncing between catalogs.

1. On the Admin sidebar, tap Marketing. Then under Channels, choose Amazon.
2. Tap Attributes tab. Locate an Amazon attribute and tap Create Attribute.
3. To enable or disable the syncing of the Amazon values to the linked Magento attribute, toggle Is Active. When activated to "Yes", the values sync according to your configuration.
4. To create a new Magento attribute to link to this Amazon attribute, select "Create New Magento Attribute" for Select Magento Product Attribute. The attribute will link to the displayed Amazon Attribute Name.
5. Enter a Magento Product Attribute Name.
6. Enter a Magento Product Attribute Code. This value must be all lowercase without spaces.
7. For Attribute Set Ids, select an Magento Attribute Set to assign the attribute to. Attributes tend to be part of an attribute set, such as a set for colors having attributes for blue, green, yellow, and red.
8. Select the value Type of the attribute value, such as text, numbers, and so on. The selection affects the allowed value for the attribute.
9. For Use for Promo Rule Conditions, toggle to allow the Magento attribute to be available for a parameter within your promotional conditions.
10. For Used in Search, toggle if the attribute and value can be used in product searches.
11. For Comparable on Storefront, toggle if the attribute value can be used in Amazon’s "Compare By" functionality.
12. Select the Magento scope for the Magento attribute. And select one or more Store Views to import Amazon values into. If you select "All Store Views (Global)", this syncs and saves values to all store views. You may only want to sync values to specific store views.

13. When complete, tap **Save Attribute Settings**.

After saving, you may want to edit the attribute to review settings and matching Amazon and Magento values for the attribute. You also have an additional option to indicate if Amazon values should overwrite Magento values.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Active</td>
<td>Indicates if this attribute is live and actively syncs between Amazon and Magento. Set to <strong>Yes</strong> to ensure the attribute values from Amazon and Magento stay in sync for the selected attribute.</td>
</tr>
<tr>
<td>Select Magento Product Attribute</td>
<td>Indicates the selected Magento attribute you want linked to the listed Amazon Attribute Name. When creating a new Magento attribute, select <strong>Create New Magento Attribute</strong>.</td>
</tr>
<tr>
<td>Amazon Attribute Name</td>
<td>Displays the name of the Amazon attribute as defined in Amazon Seller Central. The selected Magento attribute links to this Amazon attribute. You cannot edit this value through Magento.</td>
</tr>
<tr>
<td>Magento Product Attribute Name</td>
<td>Indicates the Magento attribute name, or label.</td>
</tr>
<tr>
<td>Magento Product Attribute Code</td>
<td>Indicates the Magento attribute code, all in lowercase characters without spaces.</td>
</tr>
<tr>
<td>Attribute Set Ids</td>
<td>Indicates the Magento Attribute Set to assign the attribute to. Attributes tend to be part of an attribute set, such as a set for colors having attributes for blue, green, yellow, and red.</td>
</tr>
<tr>
<td>Type</td>
<td>Indicates the value type of the attribute value, such as text, numbers, and so on. The selection affects the allowed value for the attribute.</td>
</tr>
<tr>
<td>Use for Promo Rule Conditions</td>
<td>Toggle to <strong>Yes</strong> to allow the Magento attribute to be available for a parameter within your promotional conditions.</td>
</tr>
<tr>
<td>Used in Search</td>
<td>Indicates if the attribute and value can be used in product searches.</td>
</tr>
<tr>
<td>Comparable on Storefront</td>
<td>Indicates if the attribute value can be used in Amazon's &quot;Compare By&quot; functionality.</td>
</tr>
<tr>
<td>Magento Product Attribute Scope</td>
<td>Indicates the Magento <strong>scope</strong> for the Magento attribute.</td>
</tr>
<tr>
<td>Store Views (to import values into to)</td>
<td>Select your Magento <strong>store view</strong> to sync the Amazon attribute values to. Selecting All Store Views updates the value across all Magento store views.</td>
</tr>
</tbody>
</table>
To edit an attribute:

1. On the Admin sidebar, tap **Marketing**. Then under Channels, choose **Amazon**.

2. Tap **Attributes** tab. Locate an Amazon attribute and tap **Edit Attribute**.

3. To enable or disable the syncing of the Amazon values to the linked Magento attribute, toggle **Is Active**. When activated to "Yes", the values sync according to your configuration.

4. Tap the drop-down to **Select Magento Product Attribute** to link to the displayed Amazon Attribute Name.

5. Indicate if you want the Amazon synced value to overwrite existing Magento values. For example, you may not want to overwrite the prices from Amazon into Magento.
   - Do Not Overwrite Existing Magento Values: Retains the Magento value, keeping different values for Magento and Amazon stores.
   - Overwrite Existing Magento Values: Saves the Amazon value over the Magento value in the Magento product catalog.

6. Select one or more Store Views to import Amazon values into. If you select "All Store Views (Global)"), this syncs and saves values to all store views. You may only want to sync values to specific store views.

7. When complete, tap **Save Attribute Settings**.

![Edit Attribute Settings](image)
Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is Active</td>
<td>Indicates if this attribute is live and actively syncs between Amazon and Magento. Set to Yes to ensure the attribute values from Amazon and Magento stay in sync for the selected attribute.</td>
</tr>
<tr>
<td>Select Magento Product Attribute</td>
<td>Indicates the selected Magento attribute you want linked to the listed Amazon Attribute Name. If you want to change the linked Magento attribute, select a different attribute from the drop-down list. Values sync according to configurations.</td>
</tr>
<tr>
<td>Amazon Attribute Name</td>
<td>Displays the name of the Amazon attribute as defined in Amazon Seller Central. The selected Magento attribute links to this Amazon attribute. You cannot edit this value through Magento.</td>
</tr>
<tr>
<td>Overwrite Existing Value</td>
<td>Indicates if the Amazon attribute values will overwrite existing Magento values. This affects all products with this Magento attribute. Default: Do Not Overwrite Existing Magento Values</td>
</tr>
<tr>
<td></td>
<td>• Do Not Overwrite Existing Magento Values: Retains the Magento value, keeping different values for Magento and Amazon stores.</td>
</tr>
<tr>
<td></td>
<td>• Overwrite Existing Magento Values: Saves the Amazon value over the Magento value in the Magento product catalog.</td>
</tr>
<tr>
<td>Magento Product Attribute Scope</td>
<td>Indicates the Magento scope for the Magento attribute.</td>
</tr>
<tr>
<td>Store Views (to import values into to)</td>
<td>Select your Magento store view to sync the Amazon attribute values to. Selecting All Store Views updates the value across all Magento store views.</td>
</tr>
</tbody>
</table>

Reviewing Amazon Attribute Values

As you map Amazon attributes to Magento attributes, Amazon Sales Channel tracks and provides a filterable list of all Amazon values. Use this page to verify values for your linked Magento attributes correctly sync between Magento and Amazon. You can review synced values for Amazon attribute linked or not linked to a Magento attribute. To create or edit your Amazon attributes, see Creating and Editing Attributes.
The Amazon Value differs depending on the attribute type and the Amazon attribute you view. For example, a listed Amazon value for Label would be a text value while AmazonListPrice would be a numerical amount. The status indicates if the Amazon value has been imported.

To review attribute values:
1. On the Admin sidebar, tap Marketing. Then under Channels, choose Amazon.
2. Tap the Attributes tab. Locate an Amazon attribute and tap either Create Attribute or Edit Attribute.
3. Tap the Matching Attribute Values tab.
4. To further review Magento product information, tap a linked Magento Product SKU. This opens the Magento product edit page.

Managing Attribute Values

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region</td>
<td>The region for sales activity defined in the Amazon Marketplace when the Amazon store was set up in the Amazon Sales Channel.</td>
</tr>
<tr>
<td>Magento Product SKU</td>
<td>Indicates the Magento products synced with the Amazon store. The value is a product ID assigned by Magento and linked to a product in the catalog. Tap the link to open the product in Magento.</td>
</tr>
<tr>
<td>ASIN</td>
<td>Indicates the Amazon Standard Identification Number (ASIN) 10-character alphanumeric unique identifier assigned to the product by Amazon for product identification.</td>
</tr>
<tr>
<td>Amazon Value</td>
<td>Indicates the value for the selected attribute. The Amazon Value differs depending on the attribute type and the Amazon attribute you view. For example, a listed Amazon value for Label would be a text value while AmazonListPrice would be a numerical amount. The status indicates if the Amazon value has been imported.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>imported.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates if the attribute values have been imported into Magento and linked to a Magento attribute. Options: Not Imported / Imported</td>
</tr>
</tbody>
</table>
Managing Listing Settings

Listing settings are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default.

Listing settings define how your Magento catalog products are listed on Amazon. Your listing settings consist of several categories that allow you to define the interactions and communication between Amazon Sales Channel and your respective Amazon Seller Central account.

When configuring your listing settings, you define your eligibility rules for your Magento catalog products to automatically published to Amazon as new listings, set up your Amazon listing prices based on your Magento catalog or on competitor pricing, define your fulfillment method, and more.

Settings are grouped and available in sections, to expand and configure as needed.

**To configure listing settings:**

1. Expand each section to review and configure listing settings. Complete all required fields to continue.
   - **Product Listing Actions:** Defines if eligible Magento products automatically publish to Amazon and the default handling time for shipments (2 is default).
   - **Third Party Listings:** Defines if Amazon Seller Account product listings should be imported into your Magento catalog.
   - **Listing Price:** Cap Magento pricing attributes and configure pricing settings.
   - **(B2B) Business Price:** Define your tiered-pricing settings when selling to another business.
   - **Stock / Quantity:** Configure your stock management thresholds for inventory management.
   - **Fulfilled By:** Define who fulfills orders.
   - **Catalog Search:** Configure your search parameters to ensure a reliable process for matching your Magento catalog products with your Amazon product listings.
   - **Product Listing Condition:** Configure your settings and values for product "condition." Condition is a product detail that is required by Amazon, but is not required for your Magento catalog products.

2. Tap **Save Listing Settings** to save your changes.
Listing Settings

Product Listing Actions
Third Party Listings
Listing Price
(B2B) Business Price
Stock / Quantity
Fulfilled By
Catalog Search
Product Listing Condition

Listing Settings
Product Listing Actions

Product Listing Actions settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default.

The Product Listing Actions section defines how your catalog interacts with Amazon. These settings include:

- Indicate if your Magento catalog products that meet Amazon eligibility requirements are automatically sent to your Amazon Seller Central account to create new listings.
- Set the default handling time for an order. This value defines the number of days generally required for you to process and ship an order. For example, if someone selects 2-day shipping, that shipping transit time does not start until processing completes and packages are handed off to a carrier. The total delivery time is (handling time + transit time + any holidays).

**To configure Product Listing Actions settings:**

1. Expand the Product Listing Actions section.
2. For Automatic List Action (required), choose an option in drop-down:
   - **Automatically List Eligible Products:** Select this option if you want your Magento catalog products (that meet Amazon's eligibility requirements) to automatically push to Amazon and create new Amazon Listings.
   - **Do Not Automatically List Eligible Products:** Select this option if you want to manually select your eligible Magento catalog products and create new Amazon Listings. When selected, catalog products that meet your listing criteria and contain all required information display on the Ready to List tab for manual publishing. The Ready to List tab only displays if this option is selected.
3. For Default Handling Time (required), enter a numerical amount of lead time days needed before shipment. The default value is 2 days.

This default handing time value is only effective for Amazon listings created through Amazon Sales Channel. Any Amazon listings that were created in your Amazon Seller Central account use the default handling time set for the listing in Amazon.
## Product Listing Actions

Control how your product catalog interacts with the Amazon marketplace.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic List Action</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>- Automatically List Eligible Products: (Recommended) Select this option if you want your Magento catalog products (that meet Amazon's eligibility requirements) to automatically push to Amazon and create new Amazon Listings.</td>
</tr>
<tr>
<td></td>
<td>- Do Not Automatically List Eligible Products: Select this option if you want to manually select eligible Magento catalog products and create new Amazon Listings. When selected, catalog products that meet your listing criteria and contain all required information display on the Ready to List tab for manual publishing. If not selected, the Ready to List tab does not display.</td>
</tr>
<tr>
<td>Default Handling Time</td>
<td>The numerical value that represents the number of days, in general, that it takes you to process and ship your orders. The default value is 2. This value is used for Amazon listings created in Magento and published to Amazon. The default handling time for Amazon listings prior to integrating with Magento are not affected by this field. The value defined in Amazon Sales Channel does not replace the default handling time defined in an existing Amazon listing. When a Handling Time Override is enabled and then removed, the Handling Time for an order reverts to the value defined here. If you have products that have different handling times, you can create a Handling Time Override at the product-specific level. You can manage handling time overrides in the Overrides tool, giving you flexibility to manage your product fulfillment. If there is no handling time override in Magento for a product, the handling time default will be the value defined in the Amazon listing.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling Time</td>
<td>Handling Time is a regional attribute. This means that when the value is changed for a listing, the change affects all listings that share the Amazon Seller SKU in all Amazon stores that exist for the same region (as defined when the store was integrated). However, changing the value for a shared Amazon Seller SKU in the North America region will not affect the same products listed in a store with a different defined region. The store for the region with the oldest creation date will control the priority for the Default Handling Time settings.</td>
</tr>
</tbody>
</table>
Third Party Listings

Third Party Listing settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap Third Party Listings to expand the section.

The Third Party Listings section defines if your Magento catalog will import products from your existing Amazon Seller Central listings. We recommend importing listings from Amazon, to ensure all listings have matching Magento products. By having your listings as part of your Magento catalog, you can manage all of your products from a single catalog and leverage Amazon Sales Channel features including fulfillment and order management with Amazon, intelligent repricing, and quantity management.

When you set to "Import listing", Amazon Sales Channel imports your Amazon listings into your Magento catalog, attempting to match them to existing products. If a match is not automatically found, you can import the Amazon listing as a new Magento product or manually match the listing to a product.

If you select to import listings, select the Magento attributes with values for Amazon Seller SKU and Amazon ASIN. If you do not have Magento product attributes, consider creating and assigning them. Mapping these attributes helps correctly match imported Amazon listings to your Magento products.

The initial listing import initiates when completing your store's setup during onboarding. After setup is complete and based on your cron settings, Magento continually checks for newly added Amazon listings (not created in Amazon Sales Channel) and updates your catalog according to these settings.

To configure Third Party Listings settings:

1. Expand the Third Party Listings section.

2. For Import Third Party Listings (required), select an option in the drop down:
   - **Import Listing**: Select this option if you want products and information from your Amazon listings to import into your Magento catalog of products. This is the recommended and the default setting.
   - **Do Not Import Listing**: Select this option if you want to manually create and assign new products to your Magento catalog for your Amazon listings.

   The following options fields are only active when you select to "Import Listing."

3. For Attribute That Contains Amazon Seller SKU, select the Magento attribute that matches to the Amazon Seller SKU value.

4. For Attribute That Contains Amazon ASIN, select the Magento attribute that you created and match it to the Amazon ASIN.
If you did not create these Magento attributes for your Amazon listings, see Creating Attributes for Amazon Matching for information.

```
Third Party Listings

Control whether to import existing listings contained within the Amazon marketplace

Import Third Party Listings  *  Import Listing

Attribute That Contains Amazon Seller SKU  SKU

Attribute That Contains Amazon ASIN  Amazon ASIN
```

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Import Third Party Listings    | Required field. Options:  
- Import Listing: (Recommended) Select this option if you want products and information from your Amazon listings to import into your Magento catalog of products. This is the default setting.  
- Do Not Import Listing: Select this option if you want to manually create and assign new products to your Magento catalog for your Amazon listings. |
| Attribute That Contains Amazon Seller SKU | Only active when "Import Listing" is selected. Select the Magento attribute to match to the Amazon attribute for the Amazon Seller SKU. This attribute should have been created during onboarding. See Creating Amazon Product Attributes for Amazon Matching. You may need to review your Magento attributes and create or edit an attribute to match to this Amazon data. |
| Attribute That Contains Amazon ASIN | Only active when "Import Listing" is selected. Select the Magento attribute that matches to the Amazon attribute for the Amazon ASIN. This attribute should have been created during onboarding. See Creating Product Attributes for Amazon Matching. You may need to review your Magento attributes and create or edit an attribute to match to this Amazon data. |
Listing Price

Listing Price settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap Listing Price to expand the section.

The Listing Price setting defines which Magento pricing attribute to use as your price source, which is the base (default) price value for your Amazon listings. These defined settings will be used by your pricing rules to automatically adjust your Amazon listing price relative to the selected Magento Price Source.

You can configure your pricing scope as global or website. If your pricing scope is set to global, this means that there is a single price source for all your stores/website. If your pricing scope is set to website, the price source will use fallback logic of website price (if available) followed by the default (global) price.

If your listing rules have more than one website selected in its settings, the order with which website price is used is determined by the website priority configured in your listing rules. This allows you to define product pricing across your catalog. To see if you are using website price scope, see Catalog Price Scope.

The options listed in Magento Price Source, Minimum Advertised Price (Map), and Strike Through Price (MSRP) include your configured Pricing attributes. Pricing attributes are Magento product attributes with the Catalog Input Type for Store Owner value set to Price. See Attribute Input Types.

To configure Listing Price settings:

1. Expand the Listing Price section.

2. For Magento Price Source (required), select a pricing attribute in the drop-down (default is "Price").

   The option selected in this field determines the price source used for your Amazon listings. If you create pricing rules, the rules are applied to the value defined for the attribute selected here. You may select any configured pricing attribute, however, if the selected attribute is not filled in for a product, the price source for the product will default back to "Price" when pricing rules are applied to determine the published Amazon listing price.

3. For Minimum Advertised Price (MAP), select a pricing attribute in the drop-down (default is no selection).

   This field enables a minimum advertised price (MAP) for a product. When you define a pricing attribute and your listing price for a product falls below your determined minimum price (based on your pricing source and rules), this value becomes the MAP for the listing. This allows you to implement pricing rules while still controlling your minimum price for a product. To prevent a listing price from being too low, select a pricing attribute to use as your MAP. However, if the selected pricing field is not defined for a product, the MAP will not be used.
4. For **Strike Through Price (MSRP)**, select a pricing attribute in the drop down (default is no selection).

This field determines which pricing attribute is used as the manufacturer's suggested retail price (MSRP) for a product. If your listing price is less than the defined MSRP, your Amazon listing will display a strike-through of the MSRP price and display the lower listing price, along with the calculated “You Save” amount and percentage. However, if the selected pricing field is not defined for a product, the MSRP feature will not be calculated.

**Important:** This will only apply to listings that have won the **Buy Box** position. The Buy Box is awarded by Amazon to the seller who has the product listed usually at the best price, along with other factors such as FBA/Prime shipping offered, availability, and the seller’s performance.

5. For **Apply Value Added Tax (VAT)** field, select an option (default is "Disabled").
   - **Disabled:** Select this option if you do not want to apply VAT to your listing price.
   - **Enabled:** Select this option if you want to apply VAT to your listing price. VAT is typically used as a sales tax in European countries and is added to your final listed price within Amazon. VAT does not apply to final price for listings that are used within an intelligent pricing rule, unless the price floor is hit.

6. For **VAT Percentage**, enter the value for your VAT rate (default is "0.00").

   The value entered in this field will be used to calculate the VAT amount to be added to the listing price. If 10.2 is entered, a 10.20% VAT will be applied to your listing price. This field is disabled when the Apply Value Added Tax (VAT) field is set to "Disabled."

7. For **Currency Conversion**, select an option (default is "Disabled").

   The options in this drop-down are dependent on your Magento currency settings. If options are not available, you may need to set up your currency settings.
### Field Descriptions

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</tr>
</thead>
<tbody>
<tr>
<td><strong>Magento Price Source</strong></td>
<td>The default option is &quot;Price.&quot; The option selected in this field determines the price source that will be used when creating your Amazon listings. Should you select another attribute such as &quot;Amazon Price&quot; or &quot;Special Price,&quot; this price will be used on your Amazon listing. However, should &quot;Amazon Price&quot; or &quot;Special Price&quot; not be filled out, Price will always be the default value.</td>
</tr>
<tr>
<td>** Minimum Advertised Price (MAP)**</td>
<td>The Magento attribute for MAP pricing. Selecting the MAP option automatically sets your Amazon listing to the MAP price if the listing price is less than the MAP price.</td>
</tr>
<tr>
<td><strong>Strike Through Price (MSRP)</strong></td>
<td>The Magento attribute that represents the MSRP pricing. If your Amazon listing price is less than the MSRP, it will show a strike-through of the MSRP price and display the listing price. Strike Through Price (MSRP) also calculates the &quot;You Save&quot; amount and percentage, but it only applies to listings that have won the Buy Box position.</td>
</tr>
<tr>
<td><strong>Apply Value Added Tax (VAT)</strong></td>
<td>Generally used in the European Union. Select <strong>Enabled</strong> and then enter the VAT Percentage.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>If the VAT percentage = 5, then a 5% VAT will be applied to the final listing price after all pricing rules have been applied. VAT tax will not apply to the final price for listings that are used within an intelligent pricing rule, unless the floor or ceiling is hit.</td>
</tr>
<tr>
<td>Currency Conversion</td>
<td>Allows your Magento storefront default currency to accurately convert to your default Amazon currency to publish your listing prices in the proper currency. The currency conversion will always be based on your Magento default currency. You can still view your default Magento and Amazon currencies when other currencies are available. If your default Magento currency matches your default Amazon currency, leave Currency Conversion disabled. However, let’s say that our Magento default currency is CAD (Canadian Dollars) and our Amazon default currency is USD. We will need to enable Currency Conversion and choose the Conversion Rate CAD to USD. The options presented are based on the built-in Magento currency conversions. If you do not see the option you are looking for, you will need to set up the currency in Magento.</td>
</tr>
</tbody>
</table>
(B2B) Business Price

(B2B) Business Price settings are part of your store’s listing settings. You can access the listing settings for an Active or Inactive store in the store’s dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap (B2B) Business Price to expand the section.

Amazon Business is a marketplace exclusively open for Amazon registered business accounts, and only available in the United States, France, Germany, and the United Kingdom in 2019. If the marketplace allows B2B business pricing, it will be editable within your listing settings.

B2B Business Pricing allows merchants with business accounts to purchase from each other with the expected performance of the Amazon shopping experience. With B2B business pricing, businesses can offer tiered pricing based on the quantity purchased.

For your products to be listed on the Amazon Business (B2B) site, you must first enable business in your Amazon Seller Central account. For more information on the B2B feature, see Amazon: B2B Central.

To configure (B2B) Business Price settings:

1. Expand the (B2B) Business Price section.

2. For Enable Business Pricing, select an option (default is "Disabled").

   - Disabled: Select this option if you do not want to enable business to business sales. All other fields in this section are disabled when this option is selected.

   - Enabled: Select this option if you want to enable your business to business sales. When enabled, the business price is set equal to the list price after all pricing rules have been applied. The business price follows the website pricing scope, if enabled. A business price can not be less than $1.

3. For Enable Tiered Pricing, select an option (default is "Disabled").

   - Disabled: Select this option if you want the same listing price for all order quantities. All Pricing Level fields in this section are disabled when this option is selected.

   - Enabled: Select this option if you want to enable pricing that adjusts based on order quantity. When enabled, the Pricing Level quantity and discount fields enable.

4. Complete the Pricing Level settings.

   You can define up to five quantity/discount settings that set the tier pricing for your business listings. In each row, enter the quantity threshold value and the discount percent to apply. For example, if you enter 5 in the first field of the first row and 5 in the second field, when another business purchases a quantity of 5 or more, the price will apply a 5% discount.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Business Pricing</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Disabled</strong>: Select this option if you do not want to enable business to business sales. All other fields in this section are disabled when this option is selected.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Enabled</strong>: Select this option if you want to enable your business to business sales. When enabled, the business price is set equal to the list price after all pricing rules have been applied. The business price follows the website pricing scope, if enabled. A business price can not be less than $1.</td>
</tr>
<tr>
<td>Enable Tiered Pricing</td>
<td>(Required) Options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Disabled</strong>: Select this option if you want the same listing price for all order quantities. All Pricing Level fields in this section are disabled when this option is selected.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Enabled</strong>: Select this option if you want to enable pricing that adjusts based on order quantity. When enabled, the Pricing Level quantity and discount fields enable.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

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</thead>
<tbody>
<tr>
<td>Pricing Level One-Five (qty/discount)</td>
<td>When Tiered Pricing is enabled, you can define up to five quantity/discount settings that set the tier pricing for your business listings. In each row, enter the quantity threshold value and the discount percent to apply. For example, if you enter 5 in the first field of the first row and 5 in the second field, when another business purchases a quantity of 5 or more, the price will apply a 5% discount.</td>
</tr>
</tbody>
</table>
Stock/Quantity

Stock/Quantity settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap Stock/Quantity to expand the section.

The Stock/Quantity settings are used to sync the product quantity details from your Magento storefront to the quantity on your Amazon Seller Central account. This tool is very powerful and can be leveraged for additional advertising by displaying urgency to the buyer while keeping your inventory organized. For example, some merchants may have 150 items of a particular SKU in stock in their warehouse, and want to make sure that Amazon shoppers can purchase all of their inventory. Other merchants may wish to only list one item at a time to create a sense of scarcity to the end user. To do this, you would set the Maximum Listed Quantity to 1.

Quantity is a regional attribute, and based on the Amazon Marketplace option selected during store integration. When a change is made to a product’s quantity, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration). Your first Amazon store that is set up (with the oldest creation date) controls priority in the quantity settings.

To configure Stock / Quantity settings:

1. Expand the Stock / Quantity section.
2. For Out-of-Stock Threshold (required), enter a numerical value for the lowest quantity of a product in order to keep the product eligible for its Amazon listing (default is "0").

   This means that if your Magento product stock goes lower than this number, the respective Amazon listing will be ineligible for sales through Amazon.

3. For Maximum Listed Quantity (required), enter a numerical value for the quantity you wish to display in your Amazon listing.

   This will list all your eligible Amazon listings at the entered value. As soon as an item is sold, the Amazon listing will continue to display this quantity. The displayed listing quantity available will always use this value, even when your actual product quantity is higher or lower.

   This setting is typically used when you do not manage product inventory.

   For example, you may have a product with a quantity of 80 in your Magento catalog. With this Maximum Listed Quantity set to "10," the Amazon listing will always display a quantity available of 10 and will refresh each time a sale is made for the product.

4. For "Do Not Manage Stock" Quantity (required), enter a value for your display quantity for your Amazon listings.
Amazon requires that you publish an available quantity. For Magento products that are set to not manage stock but you want to list them on Amazon, the listing will be published with available quantity of the value entered here.

![Stock / Quantity](image)

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Out-of-Stock Threshold             | Enter a numerical value for the lowest quantity of a product in order to keep the product eligible for its Amazon listing (default is "0").

This means that if your Magento product stock goes lower than this number, the respective Amazon listing will be ineligible for sales through Amazon.

| Maximum Listed Quantity             | Enter a numerical value for the quantity you wish to display in your Amazon listing.

This will list all your eligible Amazon listings at the value denoted. As soon as an item is sold, the Amazon listing will republish with the quantity entered here. This setting is typically used when you do not manage product inventory.

For example, you enter the Maximum Listed Quantity value as "10." Your actual quantity for a product is 80. Because you have set this value at "10," the Amazon listing will display a quantity available of "10" and will refresh each time a sale is made for the product. The quantity available will always display with the value in this field, even when your quantity is lower.

| "Do Not Manage Stock" Quantity     | Enter a value for your display quantity for your Amazon listings. Amazon requires that you publish an available quantity. For Magento products that are set to not manage stock but you want to list them on Amazon, the listing will be published with available quantity of the value entered here. |
Example: Maximum Listed Quantity

As soon as an item is sold, it will re-list it at this quantity.

For example, if we set the Maximum Listed Quantity = 12, but the product has Magento Quantity = 80, since our Maximum Listed Quantity = 12 this will be how our Amazon product will display:

If you set your Maximum Listed Quantity to 1, all your eligible products will be listed with a quantity of 1. As soon as an item is sold, the system will look to your Magento product and re-list the item if additional stock exists. This option might be chosen if your products are typically ordered at a quantity of 1. This will also increase urgency for the shopper when viewing your Amazon listing.
Fulfilled By

Fulfilled By settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap Fulfilled By to expand the section.

"Fulfilled by" settings define who fulfills (or ships) orders. If all of your orders are fulfilled using one method, select between merchant (you) or Amazon. If you plan on fulfilling orders from your locations and using Amazon, we recommend using the third option and configuring a Magento product attribute.

- **Fulfilled by Merchant:** Select this option when you, the merchant, will fulfill all orders. When an order is placed, inventory will be deducted from your Magento catalog.

- **Fulfilled by Amazon:** Select this option if Amazon will fulfill all orders. When selected, product inventory is not deducted from your Magento catalog when an order is placed. Inventory stock for Amazon fulfilled orders is stored and deducted from their warehouses. Before assigning this option, you must verify in your Amazon Seller Central account that your products are eligible for FBA fulfillment. FBA inventory is directly managed through your Amazon Seller Central Account. With this fulfillment method, Amazon Sales Channel does not share quantity updates between Magento and Amazon. Therefore, not all of the marketing tools described in the Quantity Settings will be available to you in Amazon Sales Channel.

- **Assign Fulfilled By Using Magento Product Attribute:** If your products may be fulfilled by you and Amazon, you may want to create a Magento product attribute with values for Fulfilled By Merchant and Fulfilled by Amazon. Setting this value per product indicates who fulfills the orders.

The fulfillment method is a regional attribute, and based on the Amazon Marketplace option selected during store integration. When a change is made, the change will affect all Amazon listings that share that Amazon Seller SKU in your Amazon stores that sell in the same region (as defined during the store's integration). This means that a change to a shared Amazon Seller SKU in the North America region will not affect your Amazon stores with a region set for a different region (as defined during the store's integration).

**To configure Stock / Quantity settings:**

1. Expand Fulfilled By.
2. For the Product Fulfilled By, select who fulfills (ships) the order:
- Fulfilled by Merchant: Merchant fulfills order.
- Fulfilled by Amazon: Amazon warehouse fulfills order.
- Assign Fulfilled By Using Magento Product Attribute: A Magento attribute indicates who fulfills the order per product. If selected, then select the Magento attribute for **Fulfilled by Attribute**.

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Fulfilled By</td>
<td>Options:</td>
</tr>
<tr>
<td>Fulfilled by Merchant:</td>
<td>(FBM) Select this if you fulfill the orders. When an order is placed, inventory will be deducted from your Magento catalog. When a new product is created, the fulfillment method of Merchant Fulfilled will be assigned.</td>
</tr>
<tr>
<td>Fulfilled by Amazon:</td>
<td>(FBA) Select this if Amazon fulfills the orders. With this fulfillment method, product inventory will not be deducted from your Magento catalog when an order is placed. When a new product is created it will be created with Fulfilled by Amazon (FBA) as the fulfillment type. You will need to ensure that your products are eligible for FBA fulfillment within your Amazon Seller Central account. FBA inventory is also directly managed through your Amazon Seller Central account. With this fulfillment method quantity updates are not pushed out relative to your Magento catalog, so you will be unable to use some of the marketing tools described in the Quantity Settings.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>* Assign Fulfilled By Using Magento Product Attribute: Select this if you have an existing</td>
</tr>
<tr>
<td></td>
<td>Magento attribute that determines if it is fulfilled by the merchant or fulfilled by Amazon.</td>
</tr>
<tr>
<td></td>
<td>When selected, the <strong>Fulfilled by Attribute</strong> field enables.</td>
</tr>
<tr>
<td>Fulfilled By Attribute</td>
<td>Select the Magento attribute used to determine the fulfillment method.</td>
</tr>
<tr>
<td></td>
<td>For example, if the attribute is Fulfilled By and you select the respective attribute value</td>
</tr>
<tr>
<td></td>
<td>to denote if it is Fulfilled By Merchant or Fulfilled By Amazon (FBA), when a new product is</td>
</tr>
<tr>
<td></td>
<td>created it will be created with FBA as the fulfillment type. As a merchant, you will need</td>
</tr>
<tr>
<td></td>
<td>to ensure that your products are eligible for FBA fulfillment within your Amazon Seller</td>
</tr>
<tr>
<td></td>
<td>Central account. FBA inventory is also directly managed through your Amazon Seller Account.</td>
</tr>
<tr>
<td></td>
<td>Options in this list depend on the attributes you set up for your Amazon products.</td>
</tr>
</tbody>
</table>
Catalog Search

Catalog Search settings are part of your store’s listing settings. You can access the listing settings for an Active or Inactive store in the store’s dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap Catalog Search to expand the section.

Catalog Search settings enable you to set matching search parameters that help to map eligible Magento products with Amazon listings. Once mapped, Amazon activates actions related to pricing, quantity, overrides, and order and product synchronization.

Defining these values increases the potential for exact matches, minimizing the need to manually match product listings later. Adding the attributes as part of your onboarding Pre-Setup Tasks, Amazon Sales Channel has a higher potential for automatically matching your products during onboarding and syncs product data between Amazon and Magento after onboarding.

If you only create the Amazon ASIN attribute (without adding ASIN values per product), your Magento products may not automatically your Amazon listings will automatically. You can manually match your products through Store Review. However, manual matching does not create the data elements needed to share and sync your product data.

Important: If you manually matched a product and you need to update an ASIN, UPC, or other data element for the product, you would have to update the data in both places, in your Magento catalog and in your Amazon listing in your Amazon Seller Central account.

To configure Search Catalog settings:

We recommend mapping these attributes and values if available. Completing this mapping is not required, but is beneficial for initial product matching and required for proper catalog syncing between Amazon and Magento.

1. Expand the Catalog Search section.

2. In the ASIN field, select the product attribute you created for the Amazon ASIN value.

   An ASIN (Amazon Standard Identification Numbers) is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.

3. In the EAN field, select the product attribute you created for the Amazon EAN value.

   The European Article Number (EAN) is a barcode standard, a 12 or 13-digit product identification code. Each EAN uniquely identifies the product, manufacturer, and its attributes; typically, the EAN is printed on a product label or packaging as a bar code. Amazon requires EAN codes to improve quality of search results and the quality of the catalog. You can obtain EANs from the manufacturer.
4. In the **GCID** field, select the product attribute you created for the Amazon GCIN value.

   The Global Catalog Identifier (GCID) is an ID for products that do not have a UPC code or ISBN. Amazon's Brand Registry allows you to register as a brand owner and create a unique ID for products.

5. In the **ISBN** field, select the product attribute you created for the Amazon ISBN value.


6. In the **UPC** field, select the product attribute you created for the Amazon UPC value.

   The Universal Product Code (UPC) is a 12-digit bar code used extensively for retail packaging in United States.

7. In the **General Search** field, select the product attribute you want to use for a general search match.

   This is an attribute that you can select to match Magento products to the appropriate Amazon listing. General search uses keyword searches from your catalog. As such, it is recommended to use a Magento attribute that carries relevant keywords, such as the product SKU or product name. General search may return many possible matches, and in such cases, you can select the appropriate Amazon listing from the possible matches. A common selection for this field is "Product Name."

---

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIN</td>
<td>ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an item's ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
</tr>
<tr>
<td>EAN (European Article Number)</td>
<td>A 12- or 13-digit product identification code. The European Article Number (EAN) is a barcode standard, a 12 or 13-digit product identification code. Each EAN uniquely identifies the product, manufacturer, and its attributes; typically, the EAN is printed on a product label or packaging as a bar code. Amazon requires EAN codes to improve quality of search results and the quality of the catalog. You can obtain EANs from the manufacturer.</td>
</tr>
<tr>
<td>GCID (Global Catalog Identifier)</td>
<td>The Global Catalog Identifier (GCID) is an ID for products that do not have a UPC code or ISBN. Amazon's Brand Registry allows you to register as a brand owner and create a unique ID for products that may not have a UPC or ISBN.</td>
</tr>
<tr>
<td>UPC (Universal Product Code)</td>
<td>A 12-digit bar code. The Universal Product Code (UPC) is a 12-digit bar code used extensively for retail packaging in United States.</td>
</tr>
<tr>
<td>General Search</td>
<td>Select an attribute from the drop-down. This is an attribute that you can select to match Magento products to the appropriate Amazon listing. General search uses keyword searches from your catalog. As such, it is recommended to use a Magento attribute that carries relevant keywords, such as the product SKU or product name. General search may return many possible matches, and in such cases, you can select the appropriate Amazon listing from the possible matches. A common selection for this field is &quot;Product Name.&quot;</td>
</tr>
</tbody>
</table>
Product Listing Condition

Product Listing Condition settings are part of your store's listing settings. You can access the listing settings for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Settings. The Listing Settings screen displays with the Product Listing Actions section expanded by default. Tap Product Listing Condition to expand the section.

Amazon requires a product listing to have a defined condition. If all your products are new, you can select one of the Amazon condition options in the drop down list to represent all of your products as your global condition value. Standard Amazon conditions include:

- New
- Refurbished
- Used; Like New
- Used; Very Good
- Used; Good
- Used; Acceptable
- Collectible; Like New
- Collectible; Very Good
- Collectible; Good
- Collectible; Acceptable

However, if your catalog contains products in different conditions (New, Used, Refurbished, etc.), you must select the Assign Condition Using Product Attribute option. This setting allows you to map your Magento condition attribute and values to your Amazon listing's conditions.

During Pre-Setup Tasks, it was recommended that you create a Magento product attribute for a product's condition. If you offer products in various conditions and you have not created a condition attribute, see Onboarding: Create a product attribute in Magento. Once the condition attribute is created, you can assign a condition value to each of your products in your Magento catalog.

**To configure Product Listing Condition settings:**

**1.** Expand the Product Listing Condition section.

**2.** For Listing Product Condition, select an option.
Standard Amazon condition value: Select one of the standard Amazon conditions to use as your global condition value for all of your Magento products.

Assign Condition Using Product Attribute: Select this option if your Magento catalog contains products in various conditions. When this option is selected, the Condition Attribute field enables and is required.

3. For Condition Attribute, select the Magento attribute to map values to each Amazon condition attribute. You may have created the attribute during pre-setup tasks. When selected, a field for each of the standard Amazon conditions displays. Map Magento attribute values to each Amazon condition.

- If your products fall into only one condition, you can map to that single Amazon condition, leaving the others blank.
- If you have products that fall in the Used or Collectible category but you do not distinguish further, you can map to a single Used or Collectible Amazon category and leave the other similar options blank. All your Used or Collectible conditions will map to the single Amazon Used or Collectible category by default.
- You can also enter additional text to describe your conditions.

For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New: Used, Very Good: Used; Good: or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to "--Select Option--." You’ll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition.
### Product Listing Condition

Control what condition to list your products

<table>
<thead>
<tr>
<th>Listing Product Condition</th>
<th>Assign Condition Using Product Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition Attribute</td>
<td>Amazon Condition</td>
</tr>
<tr>
<td>New Condition</td>
<td>New</td>
</tr>
<tr>
<td>Refurbished Condition</td>
<td>Refurbished</td>
</tr>
</tbody>
</table>

Optional text to describe refurbished condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Used; Like New Condition</th>
<th>-- Select Option --</th>
</tr>
</thead>
</table>

Optional text to describe used; like new condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Used; Very Good Condition</th>
<th>Used</th>
</tr>
</thead>
</table>

Optional text to describe used; very good condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Used; Good Condition</th>
<th>-- Select Option --</th>
</tr>
</thead>
</table>

Optional text to describe your used; good condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Used; Acceptable Condition</th>
<th>-- Select Option --</th>
</tr>
</thead>
</table>

Optional text to describe used; acceptable condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Collectible; Like New Condition</th>
<th>-- Select Option --</th>
</tr>
</thead>
</table>

Optional text to describe collectible; like new condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Collectible; Very Good Condition</th>
<th>Collectible</th>
</tr>
</thead>
</table>

Optional text to describe collectible; very good condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Collectible; Good Condition</th>
<th>-- Select Option --</th>
</tr>
</thead>
</table>

Optional text to describe collectible; good condition (1,000 characters maximum).

<table>
<thead>
<tr>
<th>Collectible; Acceptable Condition</th>
<th>-- Select Option --</th>
</tr>
</thead>
</table>

Optional text to describe collectible; acceptable condition.
# Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listing Product Condition</td>
<td>The condition of your product listings.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Standard Amazon condition value</strong>: Select one of the standard Amazon conditions to use as your global condition value for all of your Magento products.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Assign Condition Using Product Attribute</strong>: Select this option if your Magento catalog contains products in various conditions. When this option is selected, the <strong>Condition Attribute</strong> field enables and is required.</td>
</tr>
<tr>
<td></td>
<td>If most of your products are the same condition, select that condition for all of your products. Then you can use a <strong>condition override</strong> for the products that are not that condition type.</td>
</tr>
<tr>
<td></td>
<td>A required attribute for products to be listed with Amazon.</td>
</tr>
<tr>
<td>Condition Attribute</td>
<td>The attribute that defines the condition for your products. Select the product attribute you created for the Amazon condition attribute. In our Pre-Setup Tasks example, we recommended naming it &quot;Amazon Condition.&quot; When selected, a field for each of the standard Amazon conditions displays for mapping to the condition values you added when you created your condition attribute.</td>
</tr>
<tr>
<td>Defined Seller Condition</td>
<td>Additional information about the condition of the product. There is a 1,000-character limit. Seller notes are not allowed for products that are listed in New condition.</td>
</tr>
<tr>
<td>Fields</td>
<td>For each of the standard Amazon conditions, select the corresponding option to map in the drop-down. The options in the drop-down are the condition labels you added when you created your Amazon condition attribute.</td>
</tr>
<tr>
<td>Notes</td>
<td>If you have products that fall in the Used or Collectible category but you don't distinguish further, you can map to a single Used or Collectible Amazon category and leave the other similar options blank. All your Used or Collectible conditions will map to the single Amazon Used or Collectible category by default.</td>
</tr>
</tbody>
</table>
For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New: Used, Very Good: Used; Good: or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to "--Select Option--." You'll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition.

You can also enter additional text to describe your conditions.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>For example, you have a single Used condition for your products. When mapping, you will choose whether you want to map to the Amazon condition Used; Like New: Used, Very Good: Used; Good: or Used; Acceptable. Only complete the field for the Amazon condition option you want, leaving the other Used options set to &quot;--Select Option--.&quot; You'll see in the screen shot example, all of your Magento products in Used condition map to the Amazon Used; Very Good condition. You can also enter additional text to describe your conditions.</td>
</tr>
</tbody>
</table>
Listing Rules

If you are managing a store that is in "In Setup" status, see Onboarding: Listing Rules.

Listing rules are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing rules for an Active or Inactive store in the store's dashboard. In the I Want To... section, tap Listing Rules.

Listing Rules define the rules to determine which products Amazon Sales Channel will publish to your Amazon Marketplace. These rules provide many options to create simple to complex rules to include or exclude products as listings. Each rule consists of conditions that set the requirements for product listing eligibility.

Your listing rules are continually synchronized with your Magento catalog. When you add new Magento products that meet eligibility requirements set by your listing rules, the products will automatically process for listing on Amazon.

- If you want all of your products to be published to an Amazon listing, do not define any conditions for your listing rules.
- If you want to limit which of your catalog products that will be published to an Amazon listing, you will define your listing rule conditions in this step of onboarding. Defining the conditions for your Amazon listing rules follow the same logic and process as defining the conditions for Cart Price Rules in Magento.
- If your listing rules exclude a product, the eligibility status for that product changes to Ineligible. Ineligible products will not be published to Amazon.
- If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. Amazon listings can be manually removed when managing listings.

Changes to quantity and eligibility status impact all listings that share the Amazon Seller SKU in marketplaces which exist for stores selling in the same region (as defined in the Amazon Marketplace field during Store Integration) will also be impacted. However, a change to a shared Amazon Seller SKU in one region will not affect the product's Amazon listings in a different region (as defined during Store Integration).

To configure Listing Rules settings:

1. Tap Listing Rules.
2. For Website, select an option.
   The options in this drop-down are dependent on the websites you have set up in your Magento configuration. Select the website to represent which website to have eligible products listed on Amazon. Only one website can be selected, as each website requires a unique Amazon store created in Amazon Sales Channel.
3. Define your desired conditions for the eligibility of products to be listed on Amazon.
See Example: Define a Condition.

**Listing Rules**

Determines what catalog products are eligible to be listed on Amazon.

| Website | Main Website |

Listing Rule Conditions (don’t add conditions if all products are eligible for this Amazon marketplace).

*If ALL of these conditions are TRUE:

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Websites</td>
<td>The options in this drop-down are dependent on the websites you have set up in your Magento configuration. Select the website to represent which website to have eligible products listed on Amazon. Only one website can be selected, as each website requires a unique Amazon store created in Amazon Sales Channel.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Used to define the Magento attributes for product eligibility within your Amazon region. See Example: Define a Condition.</td>
</tr>
</tbody>
</table>

**Conditions Workspace**

Any areas in the conditions that are bold can be taped to see the various options.

- Don’t add conditions if all products within the selected website(s) are eligible.
- There is a complex set of back-end processes to communicate with Amazon’s systems directly. Based on the number of items you are attempting to list, and how busy Amazon's systems might be (for example, Black Friday can be a slow time to list new products), it may take time for your items to be listed on Amazon.

For more information about conditions, see **Describe the Conditions**.
Listing Rule Preview

If you are managing a store that is in "In Setup" status, see Onboarding: Listing Preview.

When you are modifying your condition definitions for your listing rules for an Active store, you can tap Preview Changes to apply your rules changes and view how your listings are impacted. It is recommended to verify your listings in this listing preview feature before saving your changes to your listing rules.

Your current Amazon listings are compared against your rules, based on the conditions you defined. You can then review which products will move to an ineligible status based on your current Amazon Seller Central account, which products will move from an ineligible state back to an eligible state, and which products will be New Amazon Listings and added to your Amazon listing from your eligible Magento catalog.

Listing Preview allows you to preview your potential Amazon listings and make any necessary adjustments to your listing rules. If you need to adjust your listing rules, click Listing Rules in the progress bar to return to the listing rules step.

Your potential Amazon listings will populate on the Listing Preview screen in one of three tabs:

- **Ineligible Listings:** Products listed on this tab are not eligible for Amazon listing based on your current listing rule settings.

  Ineligible products will not be published to Amazon. If an ineligible product is already listed on Amazon and you match the Amazon listing to your Magento catalog product, the quantity for the Amazon listing will change to 0 to prevent sales of the product. To manually remove a listing, see Ending an Amazon Listing.

  Products that are not eligible by Amazon requirements are not listed here. Those products are listed on the Inactive Listings tab.

- **Eligible Listings:** Products listed on this tab are eligible for Amazon listing based on your current listing rule setup and are eligible by Amazon requirements. This tab includes your existing Amazon listings that will import (if you have the Import Third Party Listings field set to "Import Listing" in the Listing Settings step).

- **New Listings:** Products listed on this tab include your Magento catalog products that are newly eligible for Amazon listing based on your current listing rule setup and will create new Amazon listings.

**To view your listing preview:**

Access your listing rules for an active store.

1. View your listing rules.

2. Modify your Listing Rule Conditions.

3. Tap Preview Changes in the header bar.
4. Review and confirm your listings in the Ineligible Listings, Eligible Listings, and New Listings tabs.

5. If your listings match your expectations, tap **Save Listing Rules**. If your listings do not display as expected, tap **Back** and continue to modify your conditions until your listings match your expectations.

---

**Listing Preview**

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product ID</td>
<td>The unique, sequential number that is assigned to a Magento catalog product when it is added.</td>
</tr>
<tr>
<td>Thumbnail</td>
<td>Displays a thumbnail of the main product image.</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the product, managed in the Magento Products Grid.</td>
</tr>
<tr>
<td>Type</td>
<td>The type of product, managed in the Magento Products Grid.</td>
</tr>
<tr>
<td>Attribute Set</td>
<td>The name of the attribute set used as a template for the product, managed in the Magento Products Grid.</td>
</tr>
<tr>
<td>SKU</td>
<td>The unique Stock Keeping Unit that is assigned to the product, managed in the Magento Products Grid.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Visibility | Indicates where the product is visible, managed in the Magento Products Grid. Options:  
- Not visible individually  
- Catalog  
- Search  
- Catalog, Search |
| Status | Indicates the current status of the product, managed in the Magento Products Grid. Options:  
- Enabled  
- Disabled |

### Listing Preview Workflow

*Existing Amazon listings that do not meet your listing rule settings are not automatically removed from Amazon. The listing quantity is set to “0” to prevent sales of the product. To remove the listing, you must manually remove the listing using the End Listing action.*
Managing Amazon Pricing

Amazon Sales Channel gives you the ability to set pricing rules, which allow you to set your Amazon listing price different than your Price Source. Additionally, you can stack multiple rules and even use the intelligent pricing to adjust your Amazon listing price based on competitors' Buy Box price or the lowest competitor price.

There are two types of pricing rules:

- **Standard Pricing Rule**
- **Intelligent Repricing Rule**

This feature allows you to manipulate your Amazon prices in a way that is very similar to Magento’s Catalog Price Rules. You can create complex rules that allow you to change prices for specific products, products inside of specific categories, or even with specific attributes.

You can add pricing rules for your Amazon listings. Price rules can be used to automatically adjust your listing prices, based on a set of defined conditions. Price rules are triggered and calculate your adjusted price before your product is listed on Amazon.

The price source for your Amazon listings is defined in the Magento Price Source field in your Listing Price settings. Any adjustment calculations defined in the pricing rule use price source as the starting value.

Amazon Sales Channel gives you the ability to set pricing rules, these pricing rules allow you to set your Amazon Listing price different than your Price Source. Additionally, you can stack multiple rules that will work together to adjust your price.

A pricing/repricing rule requires three sets of information during its setup:

- **Pricing Rule General Settings**: Defines the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.
- **Pricing Rule Conditions**: Determine which products will be eligible for the price rule.
- **Pricing Rule Actions**: Define the adjustment calculations that will be applied to the price source to determine the listing price.

You can create standard pricing rules that will automatically adjust your Amazon listing price relative to the selected Magento Price Source. This feature allows you to manipulate your Amazon prices in a way that is very similar to Magento's Catalog Price Rules. You can create complex rules that automatically change prices for specific products, products inside of specific categories, or products with specific attributes. You can complete traditional settings and reprice your products to increase or decrease based on a fixed amount or a percentage.

Another powerful tool is the Intelligent Repricing feature that will adjust your Amazon listing price based on competitor Buy Box Price or Lowest Competitor Price. Similar to Magento's Catalog Price Rules, this advanced feature allows you to manipulate your Amazon prices by creating complex rules that allow you define the scope for a price change for specific products, products inside of specific categories, or even with specific product attributes.
Using intelligent repricing you can adjust your products listing prices on Amazon, based on competitor’s pricing. Amazon Sales Channel has built in safeguards for you to set to protect margins or avoid matching the prices of a merchant with low feedback. Using intelligent repricing rules, Amazon listing prices can be automatically manipulated as a fixed or percentage amount (up or down) or even synchronized to the Buy Box or Lowest Price on a per item basis. Rules can even be stacked to provide unlimited flexibility.

Pricing rules determine if your product is listed on Amazon using your defined Price Source or if the price is automatically adjusted before listing on Amazon, based on defined conditions for the rule.

You can control important aspects of rules, such as active/inactive status, website eligibility, optional date ranges, and optional priority levels (used for rule stacking).

For example, you can define and set the conditions for a price rule that, when the conditions are met, automatically adjust your listing price before it is sent to Amazon.

Another pricing option is a price override, which is set at the individual listing level. A price override can be set, and an override ignores/takes priority over all other defaults, settings, and rules. An override can be set for price, handling time, condition, and seller notes (with a few exceptions). See Overrides.

### Pricing Rules

#### Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the pricing rule, as set in Pricing Rule General Settings.</td>
</tr>
<tr>
<td>Rule Type</td>
<td>The rule type, as set in Pricing Rule Actions (either Standard price rule or Intelligent repricing rule).</td>
</tr>
<tr>
<td>Is Active</td>
<td>Whether the rule is currently active, as set in Pricing Rule General Settings.</td>
</tr>
</tbody>
</table>
Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>The priority over other pricing conditions, as set in Pricing Rule General Settings.</td>
</tr>
<tr>
<td>Stop Further Rules Processing</td>
<td>Whether any further price rules will be processed on products eligible for this rule, as set in Pricing Rule General Settings.</td>
</tr>
<tr>
<td>From Date</td>
<td>The beginning of the time period in which the rule is active.</td>
</tr>
<tr>
<td>To Date</td>
<td>The end of the time period in which the rule is active.</td>
</tr>
<tr>
<td>Action</td>
<td>Lists all actions that can be applied to a specific listing. To apply an action, in the Action column, tap the Select drop-down. Options: Edit Price Rule Delete Price Rule</td>
</tr>
</tbody>
</table>

Add Pricing Rules

Pricing rules are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the Pricing rules for an Active or Inactive store in the store’s dashboard. In the I Want To... section, tap Pricing Rules.

A standard price rule action allows you to increase or decrease an Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or price source).

To add a standard pricing rule:

1. Select a store from Amazon Stores on the Amazon Sales Channel Home.
2. On the store dashboard, under I Want To..., tap Pricing Rules.
3. To add a rule, tap Add New Pricing Rule.
4. Complete the General Settings for the rule.
5. Complete the Price Rule Conditions for the rule.
6. Complete the Price Rule Actions for the rule.
7. When complete, tap Save Pricing Rule.

An intelligent repricing rule uses Amazon competitors’ pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.
To add an intelligent repricing rule:

1. Select a store from Amazon Stores on the Amazon Sales Channel Home.
2. On the store dashboard, under I Want To..., tap Pricing Rules.
3. To add a rule, tap Add New Pricing Rule.
4. Complete the General Settings for the rule.
5. Complete the Price Rule Conditions for the rule.
6. Complete the Price Rule Actions for the rule.
   a. Select Rule Type
      1. Competitor Conditional Variances
      2. Price Adjustment
      3. Floor Price
      4. Optional Ceiling Price
7. When complete, tap Save Pricing Rule
Pricing Rule General Settings

If you are managing a store that is in "In Setup" status, see Onboarding: Price Rule General Settings.

Define the name, description, active dates, priority for a rule and sets the behavior of subsequent rules, based on its priority setting.

To complete the Price Rule General Settings section:

1. For **Rule Name** (required), enter the name for the rule.
   
   This is for your internal identification purposes only. The more descriptive the rule name, the better.

2. For **Description**, enter a detailed description of your rule.
   
   This could include information on the products that qualify, the active dates, the formula for calculating your adjusted price, or any other information you’d find useful if you ever needed to modify the rule.

3. For **Status**, select an option:
   - **Active**: Select this option if you want the pricing rule to apply to your eligible products and adjust your listing pricing before publishing to Amazon.
   - **Inactive**: Select this option if you do not want the pricing rule to apply to your eligible products. This option will most likely be used when modifying a pricing rule or turning it off after a limited promotion.

4. For **From** and **To**, enter a beginning and ending date for the pricing rule. You can also tap the calendar icon to select a date from the dynamic calendar. This automatic start and stop option is beneficial when setting up limited-time or seasonal promotions with definite begin and end dates.

5. For **Priority**, enter a numerical value for the rule’s priority. Priority value equal to 1 is the highest priority. When you have multiple active pricing rules, you can use priority to determine which rule is applied first. This field is required to use the Discard Subsequent Rules feature.

6. For **Discard Subsequent Rules**, select an option.
   - **Yes**: Select this option if you do not want any other pricing rules that may apply to a product to be applied. Discarding subsequent rules means that, in the event that multiple pricing rules apply to the same product, only the pricing rule with the highest defined priority will be applied to a qualifying product. This prevents multiple pricing rules from stacking and providing unintended additional discounts.
   - **No**: Select this option if you want to allow multiple pricing rules to apply to the same product. This could result in stacking and providing multiple discounts applied to your listing price.
To discard subsequent rules, a pricing rule must use priorities which are set in the **Priority** field.

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Rule Name</strong></td>
<td>Enter a name for the rule, used for internal identification purposes. The more descriptive the rule name, the better (for example, &quot;25% off end of year book sale.&quot;).</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Enter a detailed description to explain the rule (also used for internal purposes). For example, &quot;End of year sale, 25% off all items in the Books Category.&quot;</td>
</tr>
</tbody>
</table>
| **Status** | Options:  
  * **Inactive** - The pricing rule will not apply to your eligible products. This option will most likely be used when modifying a pricing rule or turning it off after a limited promotion.  
  * **Active** - The pricing rule will apply to your eligible products and adjust your listing pricing before publishing to Amazon. |
| **From** | Optional. Enter the start date when the pricing rule will begin. For example, if you want to have a sale during the last month of the year, you would select December 1st so that the pricing rule would automatically apply to your Amazon listings starting December 1st. |
| **To** | Optional. Enter the end date when the pricing rule ends. Continuing the previous example, since we only want our sale during the last month of the year, you would set the To date as December 31st, so the pricing rule will expire on December 31st. |
## Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>Optional. Enter a priority value to assign a priority to your pricing rule. A priority value equal to 1 is the highest priority. When you have multiple pricing rules set up, you can use priority to determine which rule is applied first. This field is required to use the Discard Subsequent Rules feature.</td>
</tr>
</tbody>
</table>
| Discard Subsequent Rules | The ability to discard subsequent rules is a great feature inside of pricing rules that prevents multiple pricing rules from stacking and providing unintended additional discounts. To discard subsequent rules, a pricing rule must have a priority value defined in the Priority field. Options:  
  - **Yes**: Select this option if you do not want any other pricing rules that may apply to a product to be applied. Discarding subsequent rules means that, in the event that multiple pricing rules apply to the same product, only the pricing rule with the highest defined priority will be applied to a qualifying product. This prevents multiple pricing rules from stacking and providing unintended additional discounts  
  - **No**: Select this option if you want to allow multiple pricing rules to apply to the same product. This could result in stacking and providing multiple discounts applied to your listing price. |
Price Rule Conditions

If you are managing a store that is in "In Setup" status, see Onboarding: Price Rule Conditions.

Conditions determine which products will be eligible for the price rule. Defining the conditions for your Amazon pricing rules follow the same logic and process as defining the conditions for Cart Price Rules in Magento. If your price rule applies to all products in your Magento catalog, then leave this section blank.

Any areas in the conditions that are bold can be taped to see the various options.

Example: To build a price rule condition
This process can be simple or detailed, depending on your catalog setup. You can set up your conditions so that when "ALL" or "ANY" of the define conditions are either "TRUE" or "FALSE" for a product, then the product is eligible for the pricing rule to be applied.

Conditions are based on existing product attribute values. To apply the rule to all products, leave the conditions section blank.

If you want to define a condition based on a specific product attribute, the Use for Promo Rule Conditions field for the attribute must be set to "Yes." The field is located on the Storefront Properties screen for the attribute.

The condition in this example will define a rule that will apply a 25% discount to all products that are defined in the "Books" category.

The rule statement has two bold links, which when clicked, display the options for that part of the statement. If you save the condition without making changing a bold option, the rule applies to all your products.

- Click the ALL link, and chose either “ALL” or “ANY.”
- Click 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**:
1. Click the Add (.addButton) at the beginning of the condition line to display available attributes on which the condition function. Select an attribute on which to base the condition, such as a conditions combination or a product attribute.

- **Conditions Combination**: Selecting this option allows you to create an additional set of "All/Any" and "True/False" conditions inside the existing set.

  ![Conditions Combination](image)

- **Product Attribute**: The product attributes in this drop down is dependent on the setup of the attribute. For an attribute to display in the list, it must be configured to be used in promo rule conditions. See the Use for Promo Rule Conditions field in Product Attributes.

  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 selected condition is "Category."

    ![Product Attribute](image)

    **Condition Line 2, Part 2**

    The selected condition displays in the statement, followed by two more bold links. The options differ depending on the product attribute you select.

    Once you set the attribute, it cannot be changed. To change the attribute, you must delete the line and add the new attribute. You can delete a condition line by clicking the **Delete (🗑️)** button at the end of the line.

  b. Click the **is** link, and choose the comparison operator that describes the condition for products to meet. For this example, the comparison operator is "is." The available options depend on the attribute selected in the previous step and may include different comparison options such as matching values, not including or including at least one of a value, and greater than, equal to, and less than a numerical amount. In this example, the options are “is” and “is not.”
c. Click the ... “more” link, and choose the attribute value upon which the condition is based. The options displayed depend on the attribute’s setup. You may be asked to select an option from a drop-down, or you may need to enter text or numerical values for the condition. For this example, the field displays blank. To select your category(ies) for the rule, click the chooser icon (__) to display your selection options. This rule is for Books, click the Books checkbox. The category number populates in the field. Click the green checkmark icon (✓) to accept your category selection(s).

![Condition Line 2, Part 3](image)

The selected item displays in the statement to complete the condition.

![Condition Line 2, Part 4](image)

This example condition is complete. As stated, this condition means that any product in your Magento catalog that has a defined category of "Books" (4) is eligible for this pricing rule. You can add more condition lines to further narrow your eligible products.

2. To add another condition line to the statement, return to step 1 and repeat the process until all desired conditions are complete.

You can delete a line of the condition statement at any time by clicking the **Delete** (✓) button at the end of the line.
Price Rule Actions

If you are managing a store that is in "In Setup" status, see Onboarding: Price Rule Actions.

Price Rule Actions define the adjustment calculations that will be applied to the price source to determine the listing price.

A standard price rule allows you to increase or decrease an Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or price source).

### Standard Price Rule Actions

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Rule Type</td>
<td>Set the rule type, &quot;Standard price rule.&quot;</td>
</tr>
<tr>
<td>Price Adjustment</td>
<td>Define the adjustment calculations that will be applied to the price source to determine the listing price</td>
</tr>
</tbody>
</table>

An intelligent repricing rule uses Amazon competitors' pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.

### Intelligent Repricing Rule Actions

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Rule Type</td>
<td>Set the rule type, &quot;Intelligent repricing rule,&quot; along with competitor price source and feedback requirements.</td>
</tr>
<tr>
<td>Competitor Conditional Variances</td>
<td>Define variances for conditions of the same product sold by competitors.</td>
</tr>
<tr>
<td>Price Adjustment</td>
<td>Define the adjustment calculations that will be applied to the price source to determine the listing price</td>
</tr>
<tr>
<td>Floor Price</td>
<td>Define your lowest price for a product to prevent multiple pricing rules from setting a listing price too low.</td>
</tr>
<tr>
<td>Optional Ceiling Price</td>
<td>Define your highest price for a product to ensure that your pricing remains competitive.</td>
</tr>
</tbody>
</table>

See Price Rule Examples
Standard Price Rule Actions

A standard price rule action allows you to increase or decrease an Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or price source).

Sections of a standard price rule action include:

- Select Rule Type
- Price Adjustment

To complete the Price Rule Actions section for a Standard Price Rule:

1. For Rule Type, select "Standard price rule" in the drop-down.
2. For Price Action, select an option in the drop-down.
   - Decrease By: Select this option if you want the defined price source value to be decreased before listing to Amazon.
   - Increase By: Select this option if you want the defined price source value to be increased before listing to Amazon.
3. For Apply, select an option:
   - Apply as percentage: Select this option if you want the defined price source value adjusted by a percentage.
   - Apply as fixed amount: Select this option if you want the defined price source value adjusted by a fixed amount.
4. For Adjustment Amount (required), enter the numerical value for the price adjustment.
   - If you selected "Apply as percentage" in the Apply field, enter the percent value (example: 25 for a 25% percent adjustment).
   - If you selected "Apply as fixed amount" in the Apply field, enter the numerical value for the fixed amount (example: 25 for a $25 fixed adjustment).
5. When complete, tap Save Pricing Rule.
Standard Price Rule

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Type</td>
<td>Select &quot;Standard price rule.&quot;</td>
</tr>
<tr>
<td>Price Action</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Decrease By:</strong> Select this option if you want the defined price source value to be decreased before listing to Amazon.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Increase By:</strong> Select this option if you want the defined price source value to be increased before listing to Amazon.</td>
</tr>
<tr>
<td>Apply</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Apply as percentage:</strong> Select this option if you want the defined price source value adjusted by a percentage.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Apply as fixed amount:</strong> Select this option if you want the defined price source value adjusted by a fixed amount.</td>
</tr>
<tr>
<td>Adjustment Amount</td>
<td>Required.</td>
</tr>
</tbody>
</table>

If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a $25 fixed adjustment).
Intelligent Repricing Rule: Select Rule Type

An intelligent repricing rule uses Amazon competitors' pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.

Sections of an intelligent repricing rule include:

- Select Rule Type
- Competitor Conditional Variances
- Price Adjustment
- Floor Price
- Optional Ceiling Price

To configure the Select Rule Type section of an Intelligent Repricing Rule Action:
Define the Rule Type in the Select Price Rule Type section.

1. For Rule Type, select "Intelligent repricing rule" in the drop-down.

2. For Competitor Price Source, select an option in the drop-down.
   - Use "Buy Box" Price: Select this option when you want to adjust your Amazon pricing based on the Amazon Buy Box seller price. A Buy Box price exists when multiple sellers on Amazon offer the same product. Amazon defines the Buy Box seller based on performance requirements. Merchants seek to win the Buy Box seller status and offers maximum visibility of your product listings.
   - Use Lowest Competitor Price: Select this option when you want to compare and adjust your listing price to competitor pricing for the same product. When this option is selected, the Minimum Positive Feedback and Minimum Feedback Count fields enable.

3. If enabled, select an option for Minimum Positive Feedback.
   - All Competitor's Prices: Select this option when you want to compare and adjust your pricing based on all competitor prices for the same product.
   - Minimum 80/90/95/98% positive feedback: Select this option when you want to limit the competitors to whom you compare and adjust your pricing for the same product. This will narrow down your competitors further by requiring their listing to have a minimum of the chosen percentage of positive feedback and then use the lowest price of that subset of competitors.

4. If enabled, enter a numerical value for Minimum Feedback Count.
This is an optional numerical value that further narrows down the competitive pricing. For example, if a merchant has a 95% positive feedback rating, but only has a feedback count of 20, this might not be a competitor you would want to be included to modify your pricing against. However, if you put a value of 1000, it would require that the merchant have 95% positive feedback and a minimum of 1000 merchant reviews.

You might use these competitor pricing and feedback options to avoid basing your pricing against a competitor who has poor feedback and is selling a lower quality product.

### Intelligent Repricing Rule: Select Rule Type

#### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Type</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Standard price rule</strong>: This rule type allows you to increase or decrease the Amazon listing price by a specific percentage or fixed dollar amount relative to the Magento catalog price (or Price Source).</td>
</tr>
<tr>
<td></td>
<td>• <strong>Intelligent repricing rule</strong>: This rule type allows you to adjust your products listing prices on Amazon, based on competitor’s pricing. This option enables the Competitor Price source, Minimum Positive Feedback, Minimum Feedback Count, and Competitor Conditional Variances fields. It also enables the Floor Price and Optional Ceiling Price sections.</td>
</tr>
<tr>
<td>Competitor Price Source</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Use ”Buy Box” Price</strong>: Select this option when you want to adjust your Amazon pricing based on the Amazon Buy Box seller price. A Buy Box price exists when multiple sellers on Amazon offer the same product. Amazon defines the Buy Box seller based on performance requirements. Merchants seek to win the Buy Box seller status and offers maximum visibility of your product listings.</td>
</tr>
</tbody>
</table>
## Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use Lowest Competitor Price:</strong></td>
<td>Select this option when you want to compare and adjust your listing price to competitor pricing for the same product. When this option is selected, the Minimum Positive Feedback and Minimum Feedback Count fields enable.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Positive Feedback</th>
<th>Only active if Use Lowest Competitor Price is selected. Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Competitor's Prices:</strong></td>
<td>Select this option when you want to compare and adjust your pricing based on all competitor prices for the same product.</td>
</tr>
<tr>
<td><strong>Minimum 80/90/95/98% positive feedback:</strong></td>
<td>Select this option when you want to limit the competitors to whom you compare and adjust your pricing for the same product. This will narrow down your competitors further by requiring their listing to have a minimum of the chosen percentage of positive feedback and then use the lowest price of that subset of competitors.</td>
</tr>
</tbody>
</table>

| Minimum Feedback Count       | Only active if Use Lowest Competitor Price is selected. This is an optional numerical value that further narrows down the competitive pricing. For example, if a merchant has a 95% positive feedback rating, but only has a feedback count of 20, this might not be a competitor you would want to be included to modify your pricing against. However, if you put a value of 1000, it would require that the merchant have 95% positive feedback and a minimum of 1000 merchant reviews. |
Intelligent Repricing Rule: Competitor Conditional Variances

Sections of an intelligent repricing rule include:

- Select Rule Type
- Competitor Conditional Variances
- Price Adjustment
- Floor Price
- Optional Ceiling Price

An intelligent repricing rule uses Amazon competitors’ pricing to determine your listing price. Competitors are other sellers that are listing the same products you are listing on Amazon.

If a product exists with the same condition as yours, the base match price will be the lowest competitor price with the same condition. If no competitors match your condition, the base match price will then go through other available competitor conditions starting with New, Refurbished, and continuing down through available conditions. After a condition is found, the base match price will be the lowest price within that condition.

For example, if you have a product listed with the condition Used; Good, and the base match price is $7.99, and a competitor exists with the same product in the same condition (Used; Good) at a lower price, that price is used. If a competitor does not exist with the same condition, the system checks for a competitor with the next condition, which is New. If a competitor is found with that condition, the lowest of the prices is used.

**To configure the Competitor Conditional Variances section of an Intelligent Repricing Rule Price action:**

Define your condition variances in the Competitor Conditional Variances section.

1. For **Conditional Variance**, select an option in the drop-down.
   - **Use all competitor's product conditions**: (Default selection) Select this option if you want your product to compare against any available condition (if a match does not exist for the condition you are listing).
   - **Use Only Matching Competitor's Product Condition**: Select this option if you want your product to compare only against competitor's products in the same condition. If no match exists, the product will price at the Price Source.
   - **Apply Variance (if competitor's product condition differs)**: Select this option to first try to compare against your matched product condition. If no matching condition exists, a variance (as a percentage) will be applied relative to your product condition and the lowest competitor's condition.
When the Apply Variance feature is selected, additional variance fields display for each of your Amazon conditions. This feature allows you to utilize intelligent repricing rules when you offer products which are in a different condition than your competitors. To understand the calculation behind conditional variance, you will need to first understand that all variance is determined from a base match price.

Conditional variance options only displays when your listing settings for Condition are set to map condition values using a Magento product attribute. For all mapped conditions, you can denote a variance percentage of 1-100. The exception is collectibles, in which case a percentage greater than 100 may be applied.

![Competitor Conditional Variances](image)

**Intelligent Repricing Rule: Competitor Conditional Variances**

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Competitor Conditional Variances | Use all competitor’s product conditions - If a match does not exist for the condition you are listing your product with, this option will match against any available condition. It will first attempt to match your condition, and will then work its way down from the New condition to Used; Acceptable.  
Use only matching competitor’s product condition - This option will match against your product’s condition. If no match exists, the product will price at the Price Source.  
Apply variance (if competitor’s product condition differs) - This option will first try to match against your matched product condition. If no matching condition exists, it will apply a variance (as a percentage) relative to your product condition and the lowest competitor's condition. |
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>The conditional variance option is only available when your listing settings for Condition are set to map condition values using a Magento product attribute. For all mapped conditions, you can denote a variance percentage of 1-100. The exception to this is collectibles, in which case a percentage greater than 100 may be applied.</td>
<td></td>
</tr>
<tr>
<td>This feature allows you to utilize intelligent repricing rules when you offer products that are in a different condition than your competitors’. To understand the calculation behind conditional variance, you will need to first understand that all variance is determined from a base match price.</td>
<td></td>
</tr>
</tbody>
</table>

Calculating Conditional Variance Base

- Base Match Condition Variance (BMC) = The variance for the condition of our base match price competitor. In our example, BMC will be the variance for the New condition.
- Merchant Condition Variance (MCV) = The variance for the condition of our product. In our example, MCV = the variance for condition Used; Good.
- Base Match Price (BMP) = $7.99 (explained above)

The formula for calculating conditional variance base is as follows:

\[
\text{BMP} = \frac{100 - (\text{BMC} - \text{MCV})}{100}\text{ Conditional Variance Base}
\]

Example:

The conditional variance settings are as follows:
• BMC = 100 (Competitor condition = New)
• MCV = 80 (Merchant condition = Used; Good)
• BMP = $7.99 (Base match price = The lowest price of the matched competitor condition)

Using the conditional variance base calculation from above, our conditional variance base = $6.39. This will be the competitor price source used for our price rule actions, explained further in Price Adjustment.
The Price Adjustment section is different for Standard and Intelligent repricing rules. The "Match Competitor Price" option is only available in the Price Action drop-down when the Rule Type field is set to "Intelligent repricing rule."

Sections of an intelligent repricing rule include:

- Select Rule Type
- Competitor Conditional Variances
- Price Adjustment
- Floor Price
- Optional Ceiling Price

The price adjustment determines what you do once you have identified the competitor price source.

**To configure the Price Adjustment section:**

Define your pricing adjustment in the **Price Adjustment** section.

1. For **Price Action**, select an option:
   
   - **Decrease By**: Select this option if you want the defined price source value to be decreased before listing to Amazon.
   
   - **Increase By**: Select this option if you want the defined price source value to be increased before listing to Amazon.
   
   - **Match Competitor Price**: (Intelligent repricing rule only) Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the **Apply** and **Adjustment Amount** fields are removed.

2. For **Apply**, select an option:
   
   - **Apply as percentage**: Select this option if you want the defined price source value adjusted by a percentage.
   
   - **Apply as fixed amount**: Select this option if you want the defined price source value adjusted by a fixed amount.

3. For **Adjustment Amount** (required), enter the numerical value for the price adjustment.

   If you selected "Apply as percentage" in the **Apply** field, enter the percent value (example: 25 for a 25% percent adjustment).

   If you selected "Apply as fixed amount" in the **Apply** field, enter the numerical value for the fixed amount (example: 25 for a $25 fixed adjustment).
Intelligent Repricing Rule: Price Adjustment

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Action</td>
<td>Options:&lt;br&gt;- Decrease By: Select this option if you want the defined price source value to be decreased before listing to Amazon.&lt;br&gt;- Increase By: Select this option if you want the defined price source value to be increased before listing to Amazon.&lt;br&gt;- Match Competitor Price: (Intelligent repricing rule only)&lt;br&gt; Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the Apply and Adjustment Amount fields are removed.</td>
</tr>
<tr>
<td>Apply</td>
<td>Options:&lt;br&gt;- Apply as percentage: Select this option if you want the defined price source value adjusted by a percentage.&lt;br&gt;- Apply as fixed amount: Select this option if you want the defined price source value adjusted by a fixed amount.</td>
</tr>
<tr>
<td>Adjustment Amount</td>
<td>Required.&lt;br&gt; If you selected &quot;Apply as percentage&quot; in the Apply field, enter the percent value (example: 25 for a 25% percent adjustment).&lt;br&gt; If you selected &quot;Apply as fixed amount&quot; in the Apply field, enter the numerical value for the fixed amount (example: 25 for a $25 fixed adjustment).</td>
</tr>
</tbody>
</table>
Intelligent Repricing Rule: Floor Price

Sections of an intelligent repricing rule include:

- Select Rule Type
- Competitor Conditional Variances
- Price Adjustment
- Floor Price
- Optional Ceiling Price

The automated limit settings are used to help protect the floor pricing against the intelligent pricing rules. This allows the store owner to set a floor for their intelligent pricing rules with the ease of mind that the automated rules will not price their Amazon listing below a desired price.

Floor price attributes will work off the website scope if your Magento store is using website pricing scope. For more information, see Price Scope.

Floor price is only used with intelligent repricing rules.

To configure the Floor Price section of an Intelligent Repricing Rule Price action:

Define your lowest price setting in the Floor Price section.

1. For Floor Price Source, select an attribute from the drop-down.

Select your Magento attribute which will indicate your relative floor limit. For example, if you don’t want your product listing price to go below the Cost of your item, you would choose the Cost attribute.

2. For Floor Price Action, select an option.

   - Decrease By: Select this option if you want the defined floor price source value to be decreased before listing to Amazon.
   - Increase By: Select this option if you want the defined floor price source value to be increased before listing to Amazon.
   - Match: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the Apply and Floor Adjustment Amount fields are disabled.

3. The Apply field defaults to "Apply as percentage."

4. For Floor Adjustment Price, enter the numerical value for the percent to adjust your floor price source.

In this example, the floor price is set to be 3% above the cost of the item.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Floor Price Source</td>
<td>Choose the Magento attribute that will indicate your relative floor limit. For example, if you don’t want your product listing price to go below the cost of your item, you would choose the attribute Cost.</td>
</tr>
<tr>
<td>Floor Price Action</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Decrease By</strong>: Select this option if you want the defined price source value to be decreased before listing to Amazon.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Increase By</strong>: Select this option if you want the defined price source value to be increased before listing to Amazon.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Match Competitor Price</strong>: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the <strong>Apply</strong> and <strong>Adjustment Amount</strong> fields are removed.</td>
</tr>
<tr>
<td>Apply</td>
<td><strong>Apply as percentage</strong>: A percentage adjustment relative to the Floor Price Source.</td>
</tr>
<tr>
<td>Floor Adjustment Amount</td>
<td>Enter the numerical value for the percent to adjust your Floor Price Source.</td>
</tr>
</tbody>
</table>
Intelligent Repricing Rule: Optional Ceiling Price

Sections of an intelligent repricing rule include:

- Select Rule Type
- Competitor Conditional Variances
- Price Adjustment
- Floor Price
- Optional Ceiling Price

The automated limit settings are used to help protect the ceiling pricing against the intelligent pricing rules. This allows the store owner to set a high-price-limit for their intelligent pricing rules.

To configure the Optional Ceiling Price section of an Intelligent Repricing Rule Price action:

Select your optional highest price setting in the Optional Ceiling Price section.

1. For Ceiling Price Source, select an attribute from the drop-down.

Select your Magento attribute which will indicate your relative ceiling limit. For example, if you don’t want your product listing price to go above the MSRP of your item, you would choose the Manufacturer’s Suggested Retail Price attribute.

2. For Ceiling Price Action, select an option.

   - Decrease By: Select this option if you want the defined ceiling price source value to be decreased before listing to Amazon.
   - Increase By: Select this option if you want the defined ceiling price source value to be increased before listing to Amazon.
   - Match: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the Apply and Ceiling Adjustment Amount fields are disabled.

3. The Apply field defaults to "Apply as percentage."

4. For Ceiling Adjustment Price, enter the numerical value for the percent to adjust your floor price source.

   In this example, the ceiling price is set to be 2% below the MSRP of the item.
**Onboarding: Intelligent Price Floor Price Section**

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ceiling Price Source</td>
<td>Choose the Magento attribute that will indicate your relative ceiling limit. For example, if you don’t want your product listing price to go above the MSRP of your item, you would choose the Manufacturer’s Suggested Retail Price attribute.</td>
</tr>
<tr>
<td>Ceiling Price Action</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Decrease By</strong>: Select this option if you want the defined price source value to be decreased before listing to Amazon.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Increase By</strong>: Select this option if you want the defined price source value to be increased before listing to Amazon.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Match Competitor Price</strong>: Select this option if you want to change your Amazon listing price to match the lowest competitor price, based on your competitor feedback and variance parameters. When selected, the <strong>Apply</strong> and <strong>Adjustment Amount</strong> fields are removed.</td>
</tr>
<tr>
<td>Apply</td>
<td><strong>Apply as percentage</strong>: A percentage adjustment relative to the Ceiling Price Source.</td>
</tr>
<tr>
<td>Ceiling Adjustment Amount</td>
<td>Enter the numerical value for the percent to adjust your Ceiling Price Source.</td>
</tr>
</tbody>
</table>
Standard Price Rule Examples

Discard Subsequent Rules
The ability to discard subsequent rules is a great feature inside of pricing rules that prevents multiple pricing rules from stacking and providing unintended additional discounts. To discard subsequent rules, a pricing rule must use the priorities that are set in the Priority section.

If Discard Subsequent Rules is set to Yes, the rules with lower priority (higher numbers) will not apply to the eligible products.

For example, let’s say we have three pricing rules set up:

<table>
<thead>
<tr>
<th>RULE NAME</th>
<th>PRIORITY</th>
<th>DISCARD SUBSEQUENT RULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 10% off sale products</td>
<td>1</td>
<td>No</td>
</tr>
<tr>
<td>2. $2 off sale products</td>
<td>2</td>
<td>Yes</td>
</tr>
<tr>
<td>3. 5% off all products</td>
<td>3</td>
<td>No</td>
</tr>
</tbody>
</table>

In this scenario, rules #1 and #2 would apply to the eligible products. Rule #3 would only apply to eligible products not contained within Rule #2. This is because it has a lower priority than #2 and Discard Subsequent Rules is set to Yes. So, the eligible products in the sale category would receive 10% off and $2 off their Amazon listing price.

Applying two standard price rules

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING - RULE 1</th>
<th>SETTING - RULE 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>rule-1</td>
<td>rule-2</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Rule Type</td>
<td>Standard price</td>
<td>Standard price</td>
</tr>
<tr>
<td>Rule</td>
<td>rule</td>
<td>rule</td>
</tr>
<tr>
<td>Price action</td>
<td>Decrease By</td>
<td>Decrease By</td>
</tr>
<tr>
<td>Apply</td>
<td>Apply as percentage</td>
<td>Apply as fixed amount</td>
</tr>
</tbody>
</table>
Intelligent Repricing Rule Examples

**Buy Box price with Floor Price Source: Price**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>rule-1</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
<tr>
<td>Rule Type</td>
<td>Intelligent repricing rule</td>
</tr>
<tr>
<td>Competitor Price Source</td>
<td>Use &quot;Buy Box&quot; Price</td>
</tr>
<tr>
<td>Price Action</td>
<td>Match Competitor Price</td>
</tr>
<tr>
<td>Floor Price Source</td>
<td>Price</td>
</tr>
<tr>
<td>Floor Price Action</td>
<td>Match</td>
</tr>
</tbody>
</table>

**Product 1:**
Price: $15
Buy Box price from Amazon: $10

Because the Buy Box price is less than the original price, the product is listed at the original price.

The final price after the rule is applied: $15

**Product 2:**

Price: $5

Buy Box price from Amazon: $10

Because the Buy Box price is greater than the original price, the product is listed at the Buy Box price.

The final price after the rule is applied: $10

**Buy Box price, Floor Price Source: Price, and a 20% price decrease**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>rule-1</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
<tr>
<td>Rule Type</td>
<td>Intelligent repricing rule</td>
</tr>
<tr>
<td>Competitor Price Source</td>
<td>Use &quot;Buy Box&quot; Price</td>
</tr>
<tr>
<td>Price Action</td>
<td>Match Competitor Price</td>
</tr>
<tr>
<td>Floor Price Source</td>
<td>Price</td>
</tr>
<tr>
<td>Floor Price Action</td>
<td>Decrease By</td>
</tr>
<tr>
<td>Apply</td>
<td>Apply as a percentage</td>
</tr>
<tr>
<td>Floor Adjustment Amount</td>
<td>20</td>
</tr>
</tbody>
</table>

**Product 1:**

Price: $20

Calculated Floor Price: $16

Buy Box price from Amazon: $15

Because the Buy Box price is less than the Calculated Floor Price, the product is listed at the Calculated Floor Price.
The final price after the rule is applied: $16

**Product 2:**

Price: $15

Calculated Floor Price: $12

Buy Box price from Amazon: $15

Because the Buy Box price is greater than the Calculated Floor Price, the product is listed at the Buy Box price.

The final price after the rule is applied: $15

**Product 3:**

Price: $17

Calculated Floor Price: $13.60

Buy Box price from Amazon: $15

Because the Buy Box price is greater than the Calculated Floor Price, the product is listed at the Buy Box price.

The final price after the rule is applied: $15

**Lowest Price, All Competitor's Prices, and Use all competitor's product conditions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>rule-1</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
<tr>
<td>Rule Type</td>
<td>Intelligent repricing rule</td>
</tr>
<tr>
<td>Competitor Price Source</td>
<td>Use Lowest Competitor Price</td>
</tr>
<tr>
<td>Minimum Positive Feedback</td>
<td>All Competitor Prices</td>
</tr>
<tr>
<td>Conditional Variance</td>
<td>Use all competitor's product conditions</td>
</tr>
<tr>
<td>Price Action</td>
<td>Match Competitor Price</td>
</tr>
</tbody>
</table>
**Product 1:**

Price: $10
Condition: New

Because the lowest competitor price for the New condition is $15, the product is listed at $15.
The final price after the rule is applied: $15

**Product 2:**

Price: $10
Condition: Used; Acceptable

Because the lowest competitor price for the Used condition is $13, the product is listed at $13.
The final price after the rule is applied: $13

**Intelligent repricing rule combining ceiling price, currency conversion, and VAT**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>VAT</td>
<td>10%</td>
</tr>
<tr>
<td>Ceiling price source</td>
<td>$10</td>
</tr>
<tr>
<td>Currency conversion</td>
<td>1.25Euro:1USD</td>
</tr>
</tbody>
</table>

Ceiling price in the European (VAT) market: $10 x 1.25 = $12.50
When the ceiling price in the European (VAT) market is hit, the VAT is calculated and added. Final price after VAT: $12.50 \times (1.1) = $13.75

**Combining multiple pricing rules, ceiling price, currency conversion, and VAT**

**Intelligent pricing rule (from previous example):**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
<tr>
<td>VAT</td>
<td>10%</td>
</tr>
<tr>
<td>Ceiling price source</td>
<td>$10</td>
</tr>
<tr>
<td>Currency conversion</td>
<td>1.25Euro:1USD</td>
</tr>
</tbody>
</table>

Ceiling price in the European (VAT) market: $10 \times 1.25 = $12.50

Final price after VAT: $12.50 \times (1.1) = $13.75

**Standard pricing rule:**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
<td>2</td>
</tr>
<tr>
<td>Price Action</td>
<td>Increase By</td>
</tr>
<tr>
<td>Apply</td>
<td>Apply as fixed amount</td>
</tr>
<tr>
<td>Adjustment Amount</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

When the ceiling price is hit, the standard pricing rule will be applied on top of the intelligent pricing rule.

Final price after the standard pricing rule is applied: $13.75 + $5.00 = $18.75

**Price Adjustment**

In this example, we have chosen to define our most competitive price by looking at our Amazon competitor's lowest price who also have 95% positive feedback and a minimum feedback count of 1,000 merchant reviews.
After running this search based on these parameters, our competitive price comes back at $25. From here, we have three different Price Action choices based on this lowest price.

### Price Adjustment Example

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Price Action           | • Decrease By – This option will decrease your listing price relative to the lowest competitor price.  
                          • Increase By – This option will increase your listing price relative to the lowest competitor price.  
                          • Match Competitor Price – This option will change your Amazon listing price to match the lowest price based on our parameters. In our example, the Amazon listing price will be $25.  |
| Apply                  | • Apply as percentage  
                          • Apply as fixed amount  |
| Adjustment Amount      | Numerical value to define the percentage or fixed amount for the discount to be applied.  |
These selections mean that we are going to take the lowest price and set ours $0.01 less.

Floor price

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Floor Price Source</td>
<td>Cost = $5</td>
</tr>
<tr>
<td>Floor Price Action</td>
<td>Increase By</td>
</tr>
<tr>
<td>Apply</td>
<td>Apply as percentage</td>
</tr>
<tr>
<td>Floor Adjustment Amount</td>
<td>5</td>
</tr>
</tbody>
</table>

Floor price calculation = Floor Price Source [$5] * Floor Adjustment Amount [5%] = $5.25

This means that when our intelligent pricing rule is applied, it will not allow the listing price to be lower than $5.25 for this specific product when the cost is $5.
Price Scope

Magento provides configuration for your pricing scope to be set to global or website. If pricing is set to global scope, there will be a single price source for all websites. If pricing is set to website scope, websites can vary their pricing across and also have a fallback default pricing value. To set your price scope, see *Magento Price configuration*.

If you change your catalog price scope from global to website, all price type attributes will also change to website scope. For more information, see *Adding Websites*.

When a website price is selected, there are two price sources: the website price and the default (fall back) price. For the Amazon integration, based on your Listing Rules, you can map products from multiple websites into a single Amazon marketplace. However, this introduces the issue of which price should be published if the product exists on multiple websites with differing prices.
Price Priority Logic

In the example below, how does the system determine if we should publish $31.99, $24.99, or $27.99?

To determine which price will be used if a product is on two websites and has a varying price per website, we use price priority logic (determined by the website priority).

To view your stores’ sort order, on the Admin screen, tap Stores and then tap All Stores. In the Web Site column, tap the website name. The Web Site Information screen contains the Sort Order field, which determines the priority of the website. A value of ‘1’ indicates the highest priority.

If the product price is set to Use Default, it will fall back to the default price value instead of the website price value.
Example 1:

<table>
<thead>
<tr>
<th>WEBSITE PRIORITY</th>
<th>PRICE [WEBSITE]</th>
<th>USE DEFAULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>$31.99</td>
<td>–</td>
</tr>
<tr>
<td>Store 1</td>
<td>$24.99</td>
<td>No</td>
</tr>
<tr>
<td>Store 2</td>
<td>$27.99</td>
<td>Yes</td>
</tr>
</tbody>
</table>

- The Magento Price Source is set to Price.
- Look at the website with the highest website priority, which is Store 1.
- Since Store 1 is set to use the website price (Use Default = No), the published price will be $24.99.

Example 2:

<table>
<thead>
<tr>
<th>WEBSITE PRIORITY</th>
<th>PRICE [WEBSITE]</th>
<th>USE DEFAULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>$31.99</td>
<td>–</td>
</tr>
<tr>
<td>Store 1</td>
<td>$24.99</td>
<td>Yes</td>
</tr>
<tr>
<td>Store 2</td>
<td>$27.99</td>
<td>No</td>
</tr>
</tbody>
</table>

- The Magento Price Source is set to Price.
- Look at the website with the highest website priority, which is Store 1.
- Since Store 1 is not set to use the website price (Use Default = Yes) look at the next website in the sort order.
- Since Store 2 is set to use the website price (Use Default = No), the published price will be $27.99.

Example 3:

<table>
<thead>
<tr>
<th>WEBSITE PRIORITY</th>
<th>PRICE [WEBSITE]</th>
<th>NON-PRICE [WEBSITE]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>$31.99</td>
<td>$30.00</td>
</tr>
</tbody>
</table>
### Buy Box Competitor Pricing

The Buy Box is awarded by Amazon to the seller who has the product listed usually at the best price, along with other factors such as FBA/Prime shipping offered, availability, and the seller’s performance.

The Buy Box Competitor Pricing tab displays the Buy Box listing price, shipping price, and landed price of your competitors. This can be used to understand the price positioning of your competitors on Amazon.

**Intelligent repricing rules** can be configured to adjust your pricing based on the Amazon Buy Box price.

*Buy Box Competitor Pricing*
### Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to your catalog. You can find an item's ASIN on the product detail page along with additional details relating to the item (such as size, number of pages, or number of discs).</td>
</tr>
<tr>
<td>Is Seller</td>
<td>Whether or not the seller has won the Buy Box position for the listing.</td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Listing Price</td>
<td>The price used for your Amazon listings.</td>
</tr>
<tr>
<td>Shipping Price</td>
<td>The cost to ship the product.</td>
</tr>
<tr>
<td>Landed Price</td>
<td>The listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The date the Buy Box pricing was last updated.</td>
</tr>
</tbody>
</table>

### Lowest Competitor Pricing

The Lowest Competitor Pricing table displays the lowest final landing price, but is broken down into shipping price and listing price. This can be used to understand the price positioning of your competitors on Amazon.

**Intelligent repricing rules** can be configured to adjust your pricing based on the competitor prices.

---

### Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items.</td>
</tr>
</tbody>
</table>
### Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to your catalog. You can find an item’s ASIN on the product detail page along with additional details relating to the item (such as size, number of pages, or number of discs).</td>
<td></td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Fulfillment Channel</td>
<td>The method of fulfillment</td>
</tr>
<tr>
<td>Listing Price</td>
<td>The price used for your Amazon listings.</td>
</tr>
<tr>
<td>Shipping Price</td>
<td>The cost to ship the product.</td>
</tr>
<tr>
<td>Landed Price</td>
<td>The listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Feedback Rating</td>
<td>The average rating of the competitor from their customers (0 - 100).</td>
</tr>
<tr>
<td>Feedback Count</td>
<td>The number of ratings of the competitor from their customers.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The date the competitor pricing was last updated.</td>
</tr>
</tbody>
</table>
Managing Amazon Listings

Product Listing settings are initially defined during onboarding, but can be modified at any time after your store setup is complete. You can access the listing settings for an Active or Inactive store in the store’s dashboard. In the I Want To... section, tap Manage Listings. The Product Listings screen displays with the Active tab displayed by default.

The Product Listings screen contains several tabs from which you can view the statuses of all of your listings as well as match your products to Amazon listings.

Each tab differs slightly in the tasks available in the Actions drop-down, the Select (Action column) drop-down, and the default and available table columns, but the workspace controls are the same and allow you to customize the data that is displayed.

The Actions drop-down options can apply the selected action to all listings selected (checked), while options in the Select drop-down in the Action column apply the action only to the individual listing.

Manage Listings by Status / Tab

Manage Listings by Action

To access Product Listings:

1. On the Admin sidebar, tap Marketing. Then, under Channels, tap Amazon.
2. In the Amazon Stores tab, tap the store name for which you want to view listings.
3. On the store dashboard, under I Want to See..., tap Manage Listings.

Managing Product Listings by Tab

The Product Listings screen contains several tabs from which you can view the statuses of all of your listings as well as match your products to Amazon listings.

Each tab differs slightly in the tasks available in the Actions drop-down, the Select (Action column) drop-down, and the default and available table columns, but the workspace controls are the same and allow you to customize the data that is displayed.

The Actions drop-down options can apply the selected action to all listings selected (checked), while options in the Select drop-down in the Action column apply the action only to the individual listing.

Manage Listings by Action

<table>
<thead>
<tr>
<th>Store Review</th>
<th>Store Review</th>
<th>Store Review</th>
<th>Store Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete - 8</td>
<td>New Third Party - 116</td>
<td>Ready To List - 8</td>
<td>Inactive - 1</td>
</tr>
<tr>
<td>Active - 31</td>
<td>Overrides - 4</td>
<td>Ineligible - 2</td>
<td>Ended - 11</td>
</tr>
</tbody>
</table>

Product Listings tabs
## Product Listings Tabs

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
<th>ACTIONS</th>
</tr>
</thead>
</table>
| Incomplete         | Displays your Magento catalog products that meet your defined listing settings but are missing information required by Amazon for a listing. | - Re-attempt auto match to Amazon Listing  
|                    |                                                                            | - Update Required Info  
|                    |                                                                            | - View Details                                              |
| New Third Party    | Displays your existing Amazon listings (based on information received from Amazon) that are not matched to a product in your Magento catalog. | - Create New Catalog Product(s)  
|                    |                                                                            | - Attempt Automatic Match  
|                    |                                                                            | - Assign Catalog Product  
|                    |                                                                            | - Create New Catalog Product  
|                    |                                                                            | - View Details                                              |
| Ready to List      | Displays your catalog products that are ready to create new Amazon listings, but your store is set not to automatically publish new listings. This tab is used to manually publish your new listings. | - Publish Product to Amazon  
|                    |                                                                            | - Publish On Amazon  
|                    |                                                                            | - View Details                                              |
| Inactive           | Displays your catalog products that have been published to Amazon, but Amazon has not approved the listing for Active status. | - End Listing(s) on Amazon  
|                    |                                                                            | - Edit Listing Overrides  
|                    |                                                                            | - View Details                                              |
|                    |                                                                            | - Create Override  
|                    |                                                                            | - Edit Assigned ASIN  
|                    |                                                                            | - Create Alias Seller SKU  
|                    |                                                                            | - Switch to Fulfilled by Amazon/Merchant  
|                    |                                                                            | - End Listing                                              |
| Active             | Displays your Amazon listings that have been matched to a product in your Magento catalog, have been published to Amazon, and Amazon has approved for Active status. | - End Listing(s) on Amazon  
|                    |                                                                            | - Edit Listing Overrides  
|                    |                                                                            | - View Details                                              |
|                    |                                                                            | - Create Override  
|                    |                                                                            | - Edit Assigned ASIN  
|                    |                                                                            | - Create Alias Seller SKU  

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
<th>ACTIONS</th>
</tr>
</thead>
</table>
|Overrides | Displays your Amazon listings that meet the criteria for a defined override and to which the override has been applied. Overrides take priority over any other account setting.  | - Switch to Fulfilled by Amazon/Merchant  
- End Listing  |
|Ineligible| Displays your existing Amazon listings that are no longer eligible, based on your defined listing settings.                                                                                                  | - Edit Listing Overrides  
- Edit Overrides  
- View Details  
- Create Override  
- Edit Assigned ASIN  
- Create Alias Seller SKU  
- Switch to Fulfilled by Amazon/Merchant  
- End Listing |
|Ended     | Displays your Amazon listings that have manually been ended (removed) from Amazon.                                                                                                                            | - Publish Product to Amazon  
- View Details  
- Publish On Amazon  
- Create Alias Seller SKU |

**To access Product Listings:**

1. On the Admin sidebar, tap **Marketing**. Then, under **Channels**, tap **Amazon**.
2. In the **Amazon Stores** tab, tap the store name for which you want to view listings.
3. On the store **dashboard**, under **I Want to See...**, tap **Manage Listings**.
Incomplete Listings

Listings that display on this tab include your Magento catalog products that meet your Amazon eligibility requirements as defined in your listing rules but are missing information required by Amazon before listing (example: the Amazon ASIN or a defined product condition).

There are four possible causes for an incomplete listing, each identified by its status.

**Incomplete Listing Status**

<table>
<thead>
<tr>
<th>STATUS</th>
<th>REASON</th>
<th>UPDATE ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Missing Condition</td>
<td>Amazon accepts listings in various conditions (example: New, Refurbished, Used: Like New) listing requires a defined condition.</td>
<td>Select the respective product condition and submit.</td>
</tr>
<tr>
<td>Unable to Assign to Amazon Listing</td>
<td>Automatic match of this listing to your catalog failed. If no match is found, the listing cannot be managed by Amazon Sales Channel</td>
<td>Manually assign an ASIN to the catalog product to match to the listing.</td>
</tr>
<tr>
<td>Multiple Matches Found</td>
<td>Automatic match of this listing to your catalog failed. If multiple possible matches are found, you must select the correct match for your product.</td>
<td>Manually select the catalog product to match to this listing.</td>
</tr>
<tr>
<td>Has Variants</td>
<td>If your product has variants, such as a t-shirt that is available in different sizes or colors, you must select the variant in your catalog to be correctly assigned and matched to the listing</td>
<td>View the variants that are associated with your product and choose the correct variant to assign and match to this listing.</td>
</tr>
</tbody>
</table>

When incomplete listings are properly matched to your catalog products, the listing will move from the Incomplete tab and will publish to Amazon based on your Product Listing Actions setting.

There are three available actions on this tab to correct an Incomplete listing.

In the **Actions** drop-down:

- **Re-attempt to auto match to Amazon listings**: Selecting this option initiates the automatic process for matching your Amazon listings data to your Magento catalog. If products are not automatically matching, revisit your Catalog Search options in your listing lettings. If listings don’t automatically match after updating your Catalog Search options, you can match products manually in the Update Required Info action.

In the **Select** drop-down in the Actions column:
- **Update Required Info**: Select this option if listings do not automatically match to your catalog. You can manually match catalog products to listings, manually assign an ASIN to a catalog match, or update a missing condition for listing. See Update Required Info.

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

**Note**: If you have listings in process, the number of listings will display in a message above the tabs.

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

**Default Columns**

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items.</td>
</tr>
</tbody>
</table>

Incomplete Listings
Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIN</td>
<td>ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an item's ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
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<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
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<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Landed Price</td>
<td>The listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Amazon Quantity</td>
<td>The quantity available once the product is actively listed on Amazon.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the listing, defined by Amazon. See Incomplete Status.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap Select to display your options: Update Required Info View Details</td>
</tr>
</tbody>
</table>
New Third Party Listings

Listings that display on this tab include your existing Amazon listings that have not been matched to a product in your Magento catalog. To utilize listing management for quantity, pricing, handling time, and more, each of your Amazon listings must be assigned (matched) to a product in your Magento catalog. You have a few options to assign a listing to a product in your Magento catalog.

In the **Actions** drop-down:

- **Create New Catalog Product(s)**: Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See [Creating and Assigning Catalog Products](#).

- **Attempt Automatic Match**: Select this option to prompt Amazon Sales Channel will automatically attempt to match the selected listings to your catalog based on your current Catalog Search options in your Listing Settings. If you modify your Catalog Search options, this action will allow you to attempt the matching process again.

In the **Select** drop-down:

- **Assign Catalog Product**: Select this option to manually match the listing with a product in your Magento catalog. See [Creating and Assigning Catalog Products](#).

- **Create New Catalog Product**: Select this option to use the information in the Amazon listing to automatically create a new product in your Magento catalog. This process will automatically match the Amazon listing to the new catalog product. See [Creating and Assigning Catalog Products](#).

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See [View Details](#).

**Note**: If you have listings in process, a message will be displayed above the tabs indicating how many.
New Third Party Listings

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

Default Columns

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<thead>
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<tbody>
<tr>
<td>Amazon Seller SKU</td>
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<td>A unique block of 10 letters and/or numbers that identify items. ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
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## Default Columns (cont.)

<table>
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<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Listed Price</td>
<td>Identifies the listing price for the item, as defined by the price source and any applicable pricing rules.</td>
</tr>
<tr>
<td>Amazon Quantity</td>
<td>The quantity available once the product is actively listed on Amazon.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the listing, defined by Amazon.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <strong>Select</strong> to display your options: Assign Catalog Product Create New Catalog Product View Details</td>
</tr>
</tbody>
</table>
Ready to List

The Ready to List tab displays your Magento catalog meet your defined listing settings and are ready to publish to Amazon as a new listing. Depending on your Product Listing Actions setting, this tab displays during store review in onboarding and when managing listings from your store dashboard.

The Ready to List tab only displays when your Automatic List Action field in your listing settings is set to "Do Not Automatically List Eligible Products." This setting tells Amazon Sales Channel that any new Amazon listings must be published manually.

When the field is set to "Automatically List Eligible Products," Amazon Sales Channel automatically publishes new listings for your eligible catalog products. Since new listings are published automatically, this tab does not display.

In this tab, you can sort your active published listings using the columns provided, or add and remove columns as needed. You can also perform several actions for a listing.

You have a few options to manually publish a new listing to Amazon.

**To publish a single or multiple catalog products to new Amazon listing (s)**

1. In the left-side column, tap to check each of the listings you wish to publish.
2. In the Action drop-down, tap Publish Product to Amazon.

A confirmation message displays that the product(s) is scheduled to be listed on Amazon.

**To publish a single catalog product to a new Amazon listing**

1. In the Action column for the listing, tap Select and tap Publish on Amazon.

A confirmation message displays that the product is scheduled to be listed on Amazon.

Listing information is published to Amazon based on your cron settings. Listing information will send to Amazon at the next data sync. Until Amazon replies with the listing confirmation, the manually published listing(s) remains on the Ready to List tab with a status of "List in Progress." Once the listing confirmation is received from Amazon, the listing(s) removes from the Ready to List tab and displays in the Active tab with a status of "Active."

**Note:** If you have listings in process, the number of listings will display in a message above the tabs
### Default Columns

<table>
<thead>
<tr>
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</tr>
</thead>
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</tr>
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<td>Landed Price</td>
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Default Columns (cont.)

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<tbody>
<tr>
<td>Status</td>
<td>The status of the listing, defined by Amazon.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap Select to display your options:</td>
</tr>
<tr>
<td></td>
<td>Publish on Amazon</td>
</tr>
<tr>
<td></td>
<td>View Details</td>
</tr>
</tbody>
</table>

Common Causes of Ready to List Listings

- **Ready to List**
  - Product has been matched to an Amazon ASIN and is scheduled to be listed. If your account settings are NOT set to automatically list eligible products, the Ready to List status would represent the products which are ready to be manually listed.

- **List in Progress**
  - The product listing has been submitted to Amazon, and is awaiting confirmation of acceptance from Amazon.
Inactive Listings

Listings that display on this tab include your products that have been published to Amazon but are not active on the Amazon marketplace. Your listings could be inactive for a few different reasons. For example, you might not be eligible to list that particular brand. Inactive listings are dictated by Amazon’s listing standards and your Amazon Seller Central account permissions.

In the Actions drop-down:

- **End Listing(s) on Amazon**: Select this option to remove all selected listings from the Amazon marketplace. See Ended Listings.

- **Edit Listing Overrides**: Select this option to change the override settings for the listing. See Overrides.

In the Select drop-down:

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

- **Create Override**: Select this option to create a new override and apply it to this listing. See Creating Listing Overrides.

- **Edit Assigned ASIN**: Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See Edit Assigned ASIN.

- **Create Alias Seller SKU**: Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See Creating an Alias Seller SKU.

- **Switch to Fulfilled by Amazon/Merchant**: Select this option to change the fulfillment method associated to the order. See Fulfilled By.

- **End Listing**: Select this option to remove the listing from the Amazon marketplace. See Ended Listings.

**Note**: If you have listings in process, a message will be displayed above the tabs indicating how many.
Inactive Listings

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

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<td>Status</td>
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</table>
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<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactive Reason (if provided by Amazon)</td>
<td>Amazon will not always provide a reason for inactive listings, and you may need to reach out to customer support to resolve listing issues. In some instances, Amazon will notify you of a reason. To view these responses, in the Actions column, tap View Details. If these issues are resolved and Amazon lifts the error, the products will change to Active listings and move to the Active listings table.</td>
</tr>
</tbody>
</table>

| Action                                      | List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap Select to display your options: View Details  Create Override  Edit Assigned ASIN  Create Alias Seller SKU  Switch to Fulfilled By Amazon/Merchant  End Listing |


Active Listings

Listings that display on this tab include your Amazon listings that are active on the Amazon marketplace and that have been matched to a product in your Magento catalog. In this tab, you can sort your active published listings using the columns provided, or add and remove columns as needed. You can also perform several actions for a listing.

In the Actions drop-down:

- **End Listing(s) on Amazon**: Select this option to remove all selected listings from the Amazon marketplace. See Ended Listings.

- **Edit Listing Overrides**: Select this option to change the override settings for the listing. See Overrides.

In the Select drop-down in the Actions column:

- **View Details**: Select this option to view listing details, including the Listing Activity Log, Buy Box Competitor Pricing, and Lowest Competitor Pricing. This action is for viewing only. No changes can be made in the listing details. See View Details.

- **Create Override**: Select this option to create a new override and apply it to this listing. See Creating Listing Overrides.

- **Edit Assigned ASIN**: Select this option to modify the ASIN assigned to your catalog product. This would be used if a product in your catalog was matched to the wrong ASIN. See Edit Assigned ASIN.

- **Create Alias Seller SKU**: Select this option to create an Alias SKU that can be used to create a new Amazon listing from the same catalog product. See Creating an Alias Seller SKU.

- **Switch to Fulfilled by Amazon/Merchant**: Select this option to change the fulfillment method associated to the order. See Fulfilled By.

- **End Listing**: Select this option to remove the listing from the Amazon marketplace. See Ended Listings.

**Note**: If you have listings in process, the number of listings will display in a message above the tabs.
Active Listings

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items.</td>
</tr>
</tbody>
</table>
**Default Columns (cont.)**

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Landed Price</td>
<td>The listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Amazon Quantity</td>
<td>The quantity available once the product is actively listed on Amazon.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the listing, defined by Amazon.</td>
</tr>
<tr>
<td>Buy Box Won</td>
<td>Whether the product listing won the Buy Box position.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap Select to display your options:</td>
</tr>
<tr>
<td></td>
<td>View Details</td>
</tr>
<tr>
<td></td>
<td>Create Override</td>
</tr>
<tr>
<td></td>
<td>Edit Assigned ASIN</td>
</tr>
<tr>
<td></td>
<td>Create Alias Seller SKU</td>
</tr>
<tr>
<td></td>
<td>Switch to Fulfilled By Amazon/Merchant</td>
</tr>
<tr>
<td></td>
<td>End Listing</td>
</tr>
</tbody>
</table>
Overrides

The Overrides tab displays your Amazon listings to which you have applied an override. An override is a listing-specific setting that can be used set a defined value to a listing. An override applied to a listing defines the setting for the listing, regardless of other defined listing settings or rules for which the listing is eligible. When an override is applied to a listing, the listing displays on the Overrides tab. The value defined in the override displays in the appropriate column for the listing. There are four types of overrides that can be applied: Price, Handling Time, Condition, and Seller Notes.

Types of Overrides

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price</td>
<td>An override that sets the price of the listing, ignoring all other price settings for the listing.</td>
</tr>
<tr>
<td>Example:</td>
<td>You've defined a 20% discount price rule that applies to all products in a specific category of your catalog. You have a product that is brand new to market and the demand is high so you do not want the discounted price applied to the listing even though the product is in the category for which the rule is defined. You can select the listing, create a price override, and define the listing price in a price override.</td>
</tr>
<tr>
<td>Handling Time</td>
<td>An override that sets the handling time for a listing, ignoring the default handling time set in listing settings.</td>
</tr>
<tr>
<td>Example:</td>
<td>Your default handling time for your listings is set to 2 days. You have a product that is fragile and requires an extra day to ensure its special packaging for shipping. You can view the listing, create a handling time override, and define the handling time at three days.</td>
</tr>
<tr>
<td>Note:</td>
<td>Not available for products set to &quot;Fulfilled by Amazon.&quot;</td>
</tr>
<tr>
<td>Condition</td>
<td>An override that sets the condition value of a listing, regardless of the condition attribute assigned to the listing.</td>
</tr>
<tr>
<td>Example:</td>
<td>Most of the products in your catalog are New condition, but you have a product that is in Refurbished condition. You can view the listing, create a condition override, and define the Refurbished condition for the listing.</td>
</tr>
<tr>
<td>Note:</td>
<td>Not available for products set to &quot;Fulfilled by Amazon.&quot;</td>
</tr>
</tbody>
</table>
Types of Overrides (cont.)

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seller Notes</td>
<td>An override that defines the Seller Notes section of the listing. This field can be used to add additional information related to the product or the override applied, typically used to describe the condition of &quot;non-new&quot; products. Text in this field displays with the listing for the shopper. Seller notes can not be added for a listing with a condition value of &quot;New.&quot;</td>
</tr>
</tbody>
</table>

**Example:** You have a product that is in Refurbished condition. Normally products in this conditions do not include any manuals or documents, but you have a different supplier for this product that includes a manual. You can view the listing, create a seller notes override, and add your text note that is unique to this listing about the manual so the shopper knows it is included.

**Note:** If a product has a defined condition of "New," you can enter a seller notes override, but Amazon will not display seller notes for a "New" product.

You can create, edit, or remove an override for a single listing. The **Create Override** action is available in the Action column when viewing listings on the Inactive, Active, and Ineligible tabs. The **Edit Overrides** action is only available in the Action column when a listing has an override applied and is viewed on the Overrides tab.

You can also create, edit, or remove an override to multiple listings. The **Edit Listing Overrides** action is available in the Actions drop-down when viewing listings on the Inactive, Active, Overrides, and Ineligible tabs.

Removing an override tells the listing to use the values defined by your listing settings and rules.

When defining an override, you can also choose to enter a single type of override or any combination of the types.

See **Creating and Editing Overrides**.

**Note:** If you have listings in process, the number of listings will display in a message above the tabs.
Overrides tab

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items.</td>
</tr>
<tr>
<td></td>
<td>ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
</tr>
<tr>
<td>Condition Override</td>
<td>The new condition defined in the override. If the override applied to the listing is not a condition override, &quot;Not Selected&quot; will display.</td>
</tr>
<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td>Seller Notes Override</td>
<td>The new seller notes defined in the override. If the override applied to the listing is not a seller notes override, this column will be blank.</td>
</tr>
<tr>
<td>Handling Override</td>
<td>The new handling time defined in the override (in days). If the override applied to the listing is not a handling time override, this column will be blank.</td>
</tr>
</tbody>
</table>
### Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Price Override</td>
<td>The new listing price defined in the override. If the override applied to the listing is not a price override, &quot;N/A&quot; will display in this column.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap Select to display your options:</td>
</tr>
<tr>
<td></td>
<td>Edit Overrides</td>
</tr>
<tr>
<td></td>
<td>View Details</td>
</tr>
</tbody>
</table>

### Optional Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>The numerical identifier assigned by Magento.</td>
</tr>
<tr>
<td>Magento SKU</td>
<td>The SKU (Stock Keeping Unit) assigned to a product in Magento to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>Store Name</td>
<td>Identifies the name of the Amazon Sales Channel store to which the order is assigned, as defined during store setup.</td>
</tr>
</tbody>
</table>
Ineligible Listings

The Ineligible Listings tab displays a list of all the products that are currently published on Amazon but are not eligible as a listing based on your current listing rules. If a previous product was eligible and the listing rules are modified making some products ineligible, the quantity associated with a product drops to 0 and the product is marked as ineligible but will still be present on your Amazon Seller Account.

To move a product out of the Ineligible Listings tab, you may need to modify your listing rules to allow your products to be eligible.

**Note:** If you have listings in process, the number of listings will display in a message above the tabs.

![Ineligible Listings](image)

Amazon Sales Channel Home tabs share some common **workspace controls** that allow you to customize the data that is displayed.

**Default Columns**

<table>
<thead>
<tr>
<th>COLUMN</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
</tbody>
</table>
### Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items. ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
</tr>
<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Landed Price</td>
<td>The listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Amazon Quantity</td>
<td>The quantity available once the product is actively listed on Amazon.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap Select to display your options: View Details, Create Override, Edit Assigned ASIN, Create Alias Seller SKU, Switch to Fulfilled By Amazon/Merchant, End Listing</td>
</tr>
</tbody>
</table>

---

**Note:**

The Amazon Sales Channel Onboarding section provides detailed guides on integrating Magento for B2B Commerce with Amazon's sales channel. This includes setting up and managing product listings, understanding ASINs, and managing inventory and orders through the Amazon platform.

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**Magento for B2B Commerce User Guide**

**Onboarding Amazon Sales Channel**

**CHAPTER 46: Amazon Sales Channel**

1062
Ended Listings

The Ended Listings tab displays all the Amazon products that have been manually ended (removed) from your Amazon Seller Central account. These products meet all of the listing requirements and can be republished at any time and do not require additional information. If a product is in the Ineligible Listings tab, you may need to modify your listing settings to so that your product meets listing eligibility.

**Note:** If you have listings in process, the number of listings will display in a message above the tabs

**To manually end a single or multiple Amazon listings**

1. Locate the listing(s) you want to end on the Inactive, Active, or Ineligible tab.

2. In the left-side column, tap to check each of the listings you wish to end.

3. In the Action drop-down, tap End listing(s) on Amazon.

4. Tap OK on the confirmation message that displays.

**To manually end a single Amazon listing**

1. Locate the listing you want to end on the Inactive, Active, or Ineligible tab.

2. In the Action column for the listing, tap Select and tap End Listing.

3. Tap OK on the confirmation message that displays.

   When ending a listing, a confirmation message displays that the selected listing is being processed to end. Ended listings can be managed on Ended tab in Manage Listings. Once processed and removed from Amazon, the status for the listing will display as "Manually Ended.". Ended listings will remain removed from Amazon until you manually republish the listing using the Republish to Amazon action.

**To republish a single or multiple Amazon listing(s) that has been ended**

1. In the left-side column, tap to check each of the listings you wish to republish.

2. In the Action drop-down, tap Publish Product to Amazon.

3. Tap OK on the confirmation message that displays.

**To republish a single Amazon listing that has been ended**

1. In the Action column for the listing, tap Select and tap End Listing.

2. Tap OK on the confirmation message that displays.

   A confirmation message will display that the selected listing is being processed to publish.
Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

**Default Columns**

<table>
<thead>
<tr>
<th>COLUMN</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
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<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items.</td>
</tr>
<tr>
<td></td>
<td>ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
</tr>
<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td>Condition</td>
<td>The condition of the product.</td>
</tr>
<tr>
<td>Landed Price</td>
<td>The listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Amazon Quantity</td>
<td>The quantity available once the product is actively listed on Amazon.</td>
</tr>
</tbody>
</table>
Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>The status of the listing, defined by Amazon.</td>
</tr>
<tr>
<td>Action</td>
<td>List of available actions that can be applied to a specific listing. To apply an action, in the Actions column, tap <strong>Select</strong> to display your options: View Details, Publish on Amazon, Create Alias Seller SKU</td>
</tr>
</tbody>
</table>

Managing Product Listings by Action

The Product Listings screen contains several tabs from which you can view the statuses of all of your listings as well as match your products to Amazon listings.

Each tab differs slightly in the tasks available in the **Actions** drop-down, the **Select** (Action column) drop-down, and the default and available table columns, but the workspace controls are the same and allow you to customize the data that is displayed.

The **Actions** drop-down options can apply the selected action to all listings selected (checked), while options in the **Select** drop-down in the **Action** column apply the action only to the individual listing.

Manage Listings by Status / Tab

Product Listings Actions

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
<th>TAB(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-attempt auto match to Amazon Listing</td>
<td>Used to move the incomplete products back through the matching process. To attempt rematch, you must modify your Listing and Catalog Search settings to increase the potential for automatic matching.</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Update Required Info</td>
<td>Manually match your catalog products to Amazon listings by selecting a listing to match, entering an ASIN to match, or assigning a missing condition.</td>
<td>Incomplete</td>
</tr>
<tr>
<td>View Details</td>
<td>View additional information on your active products, including the Listing Activity Log which displays the changes on an individual SKU / Product.</td>
<td>Incomplete, New Third Party, Ready to List</td>
</tr>
<tr>
<td>ACTION</td>
<td>DESCRIPTION</td>
<td>TAB(S)</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Create New Catalog Product(s)</td>
<td>Create a new Magento catalog product using the information imported with the Amazon listing.</td>
<td>New Third Party</td>
</tr>
<tr>
<td>Attempt Automatic Match</td>
<td>Attempt an automatic match between your Magento catalog and your Amazon listings based on the search criteria settings. To attempt rematch, you must modify your Listing and Catalog Search settings to increase the potential for automatic matching.</td>
<td>New Third Party</td>
</tr>
<tr>
<td>Assign Catalog Product</td>
<td>Manually select a product that already exists in your Magento catalog and assign it to the Amazon listing.</td>
<td>New Third Party</td>
</tr>
<tr>
<td>Create New Catalog Product</td>
<td>Create a new Magento catalog product using the information imported with the Amazon listing.</td>
<td>New Third Party</td>
</tr>
<tr>
<td>Publish Product to Amazon</td>
<td>(Mass action) Used to re-list an listing that has been ended or to manually list a product that meets your listing rules eligibility, but your Product Listing Actions is not set to &quot;Automatically list new products.&quot;</td>
<td>Ready to List, Ended</td>
</tr>
<tr>
<td>Publish On Amazon</td>
<td>(Single listing action) Used to re-list an listing that has been ended or to manually list a product that meets your listing rules eligibility, but your Product Listing Actions is not set to &quot;Automatically list new products.&quot;</td>
<td>Ready to List, Ended</td>
</tr>
<tr>
<td>End Listing(s) on</td>
<td>(Mass action) Used to manually end and</td>
<td>Inactive</td>
</tr>
</tbody>
</table>
### Product Listings Actions (cont.)

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
<th>TAB(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon</td>
<td>remove listings for your products that exist on Amazon. Ended listings can be re-listed as long as they meet your listing rules eligibility.</td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ineligible</td>
</tr>
<tr>
<td>Edit Listing Overrides</td>
<td>(Mass action) Manually edit an existing &quot;override&quot; that will set the price, handling time, condition, and seller notes text for an individual listing, ignoring other listing defaults, settings, and rules.</td>
<td>• Inactive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Overrides</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ineligible</td>
</tr>
<tr>
<td>Create Override</td>
<td>Manually create an &quot;override&quot; that will set the price, handling time, condition, and seller notes text for an individual listing, ignoring other listing defaults, settings, and rules.</td>
<td>• Inactive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ineligible</td>
</tr>
<tr>
<td>Edit Assigned ASIN</td>
<td>Used if the ASIN matched to your catalog product needs to be modified (example: if the product was matched to the wrong listing ASIN).</td>
<td>• Inactive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ineligible</td>
</tr>
<tr>
<td>Create Alias Seller SKU</td>
<td>Can serve two functions:</td>
<td>• Inactive</td>
</tr>
<tr>
<td></td>
<td>• Can be used to create a 1-to-2 relationship between your catalog product and two Amazon listings. Example: Amazon has the product listed with different ASIN values. You can match your one catalog product to both ASIN listings for the product.</td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td>• Can be used to control a listing in different Amazon regions. Example: You have a catalog product that has different shipping methods defined based on the Amazon region (US region is FBA and Canada region is FBM). To control stock/quantity, you can create an alias seller SKU and relist the same product in that region with a different Seller SKU.</td>
<td>• Ineligible</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ended</td>
</tr>
<tr>
<td>Switch to Fulfilled by</td>
<td>Used to modify the fulfillment method</td>
<td>• Inactive</td>
</tr>
</tbody>
</table>
## Product Listings Actions (cont.)

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
<th>TAB(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon/Merchant</td>
<td>associated with your product (Fulfilled by Amazon: FBA or Fulfilled by Merchant: FBM).</td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ineligible</td>
</tr>
<tr>
<td>End Listing</td>
<td>(Single listing action) Used to manually end and remove listings for your products that exist on Amazon. Ended listings can be re-listed as long as they meet your listing rules eligibility.</td>
<td>• Inactive</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Active</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ineligible</td>
</tr>
<tr>
<td>Edit Overrides</td>
<td>(Single listing action) Manually edit an existing &quot;override&quot; that will set the price, handling time, condition, and seller notes text for an individual listing, ignoring other listing defaults, settings, and rules.</td>
<td>• Overrides</td>
</tr>
</tbody>
</table>
Creating and Assigning Products

When viewing New Third Party tab during onboarding or when managing your listings, you can match your Magento catalog products to an existing Amazon listing. There are two options for this matching. You can assign a listing to an existing catalog product, or you can use the information from the listing to create new catalog products. These options are helpful when your Amazon listings do not automatically match to your Magento catalog.

Assigning (or matching) your products to your Amazon listings is necessary to use the full feature set of Amazon Sales Channel.

When you create a new catalog product from an Amazon listing:

- The ASIN becomes the Magento SKU
- The Product Listing Name becomes the Catalog Listing Name
- The Price and Quantity are taken from the Amazon Listing

The rest of the necessary settings are determined by the Magento product settings you select during creation.

Once created and matched, the listings remove from the New Third Party tab and display on the Active tab.

**To assign a single catalog product to an Amazon listing**

2. Find the listing you wish to assign/match in the list and tap Select in the Action column. Then tap Assign Catalog Product. The Assign Magento Catalog Product screen displays.
3. Browse for or filter the list using the workspace controls and locate the appropriate catalog product to match to the listing.
4. When the correct product is located in the list, tap Assign Catalog Product in the Action column.

Your product and listing are now matched. Amazon Sales Channel can now share product and listing data with Amazon and manage your listing and its information, including listing price, shipping price, stock/quantity, order information and status, and more.

**To create a single catalog product using the Amazon listing information**

2. Find the listing you wish to create in your Magento catalog and tap Select in the Action column. Then tap Create New Catalog Product. The Create Magento Catalog Product screen displays.
3. Complete the catalog settings for the product.
   a. Set the Enable Product(s) toggle to Yes or No (required).
Yes: Select this option to make the product eligible for your Magento storefront sales.

No: Select this option to make the product ineligible for your Magento storefront sales.

1. For Categories, assign a category for the product (optional).

   Tap the drop-down arrow and tap a category checkbox to select the product's category. Tap Done when finished.

2. For Website Ids, select the website (storefront) for which the product to be associated.

   The options in this list are dependent on your Magento store configuration settings.

3. For Attribute Set Id (required), select an option in the drop-down.

   "Default" is the default selection. The options in this list are dependent on your Magento attribute sets you have configured.

4. For Visibility, select an option for the new product in the drop-down.

   Not Visible Individually (default): The product is not included in your storefront listings, although it might be available as a variation of another product.

   Catalog: The product displays in your catalog listings.

   Search: The product is available for search operations.

   Catalog and Search: The product is included in catalog listings and available for search operations.

5. For Assign Tax Class, select an option for the product in the drop-down.

   The options that display in this list are dependent on the tax classes you have configured.

6. When complete, tap Create Catalog Products.

   The catalog product is created in your Magento catalog, and assigned to the Amazon listing from which it was created. With the listing now matched to an existing Amazon listing, the listing will remove from the New Third Party tab and display in the Active tab.

**To create a multiple catalog products using their Amazon listing information**


2. Select the listings for which to create catalog products.

   You can tap individual checkboxes in the left-side column or you can tap the drop-down arrow in the top-left column and choose Select All or Select All on this Page.

3. Tap the Actions field. Then tap Create New Catalog Product(s).

4. Tap OK to accept the confirmation message. The Create Magento Catalog Product screen displays.

5. Complete the catalog settings for the products.
When creating catalog products for multiple selected listings, the product settings entered are applied to all the listings.

a. Set the **Enable Product(s)** toggle to Yes or No (required).

**Yes**: Select this option to make the product eligible for your Magento storefront sales.

**No**: Select this option to make the product ineligible for your Magento storefront sales.

7. For **Categories**, assign a category for the product (optional).

Tap the drop-down arrow and tap a category checkbox to select the product’s category. Tap **Done** when finished.

8. For **Website Ids**, select the website (storefront) for which the product to be associated.

The options in this list are dependent on your Magento store configuration settings.

9. For **Attribute Set Id** (required), select an option in the drop-down.

"Default" is the default selection. The options in this list are dependent on your Magento attribute sets you have configured.

10. For **Visibility**, select an option for the new product in the drop-down.

**Not Visible Individually** (default): The product is not included in your storefront listings, although it might be available as a variation of another product.

**Catalog**: The product displays in your catalog listings.

**Search**: The product is available for search operations.

**Catalog and Search**: The product is included in catalog listings and available for search operations.

11. For **Assign Tax Class**, select an option for the product in the drop-down.

The options that display in this list are dependent on the tax classes you have configured.

12. When complete, tap **Create Catalog Products**.

The catalog products are created in your Magento catalog and assigned to the Amazon listing from which it was created. With the listings now matched to their respective Amazon listing, the listings will remove from the New Third Party tab and display in the Active tab.
Create Magento Catalog Product

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Product(s)</td>
<td>(Required) If enabled, the product will be visible in your Magento storefront; if disabled, the product will not show in your Magento storefront.</td>
</tr>
<tr>
<td>Categories</td>
<td>You can enter the name of the category for your new product or select a category by tapping the drop-down arrow to display your options. Options are dependent on your categories configuration.</td>
</tr>
<tr>
<td>Website Ids</td>
<td>(Required) Select the website (storefront) for which the product to be associated. Options are dependent on your Magento store configuration settings.</td>
</tr>
<tr>
<td>Attribute Set Id</td>
<td>Select an attribute set from the drop-down. Options are dependent on your configured Magento attribute sets.</td>
</tr>
<tr>
<td>Visibility</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>Not Visible Individually: The product will not be visible in your Magento storefront. This is the visibility usually assigned to variant products.</td>
</tr>
<tr>
<td></td>
<td>Catalog: Allows the product to be accessed through the category it is associated to within the website.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Allows the product to only be found through the search tool.</td>
</tr>
<tr>
<td>Catalog and Search</td>
<td>Allows the products to be accessed through the category structure and by using the search tool.</td>
</tr>
<tr>
<td>Assign Tax Class</td>
<td>Assign a tax class to the new product from the drop-down. Options are dependent on your configured tax classes.</td>
</tr>
</tbody>
</table>
Creating and Editing Overrides

You can create and override for a listing or edit or remove an override that has been applied to a listing. Overrides set a defined value for a specific listing.

To Create an Override for a Single Listing

The Create Override action is available when viewing listings on the Inactive, Active, and Ineligible tabs.

1. View a listing on a Products Listings tab.

2. In the Action column, tap Select and then tap Create Override. The Product Listing Overrides screen displays.

3. Verify the Listing Details to ensure you are viewing the correct listing.

4. You can define a single override type or any combination of types for the listing (Price, Handling Time, Condition, Seller Notes).

   - **Price:** Tap the Change Listing Price radio button. Enter your defined price value in the Price Override field.

   - **Handling Time:** Tap the Change Handling Time radio button. Enter the defined time value (in days) in the Handling Time Override field.

   - **Condition:** Tap the Change Condition radio button. Select the correct option in the Condition Override drop-down.

   - **Seller Notes:** Tap the Change Seller Notes radio button. Enter your notes text in the Seller Notes Override field.

5. Tap Save Listing Override.

The Product Listing Overrides screen closes. The status of the listing changes to “Relist in Progress.” The change will be published to Amazon with your next data sync (as configured in your cron settings). The listing is also added to the Overrides tab.

The following example screen shows an override that defines a new price of $55, a new handling time of 1 day, a new condition of "Used; Like New," and new Seller Note text.
Create an Override

To Edit or Remove an Override for a Single Listing

The **Edit Overrides** action is available when viewing listings on the Overrides tab.

1. View a listing on a Products Listings tab (Inactive, Active, Overrides, or Ineligible).
2. In the Action column, tap **Select** and then tap **Edit Overrides**. The Product Listing Overrides screen displays just as when creating an override.

3. Verify the Listing Details to ensure you are viewing the correct listing.
4. To keep an override type the same, ensure the No Change To radio button selected for the type. This is the default setting. Selecting this option leaves the previously defined override value unchanged.

5. To edit your override settings, define the sections for the type you want to change (Price, Handling Time, Condition, Seller Notes).
   - **Price**: Tap the Change Listing Price radio button. Enter your defined price value for Price Override.
   - **Handling Time**: Tap the Change Handling Time radio button. Enter the defined time value (in days) for Handling Time Override.
   - **Condition**: Tap the Change Condition radio button. Select the correct option for Condition Override.
   - **Seller Notes**: Tap the Change Seller Notes radio button. Enter your notes text for Seller Notes Override.

6. To remove an override type, tap the Remove radio button for each of the types you want to remove. If not removed, the previously defined value remains in the override.

7. Tap **Save Listing Override**.

The Product Listing Overrides screen closes. The status of the listing changes to "Relist in Progress." The change will be published to Amazon with your next data sync (as configured in your cron settings). If not already listed, the listings are also added to the Overrides tab. Piggybacking on the Create an Override example. The following example screen shows an edit to the previously created override that defines a new price of $50, removes the Handling Time override, and keeps the previous Condition and Seller Notes overrides.
Editing or Removing an Override

To Edit or Remove an Override for Multiple Listings

The **Edit Listing Overrides** action is available in the Actions drop-down when viewing listings on the Inactive, Active, Overrides, and Ineligible tabs.

1. View the listing on a Products Listings tab (Inactive, Active, Overrides, or Ineligible).
2. Tap the checkbox in the left-side column to select each of the listings you want to modify.
3. In the Actions drop-down, tap **Edit Listing Overrides**. The Product Listing Overrides screen displays just as when creating an override.
Because you are modifying overrides for multiple listings, the Listing Details section does not display as it does when modifying a single listing.

4. To keep an override the same, ensure the No Change To radio button selected for the type. "No Change To" is the default setting. Selecting this option leaves the previously defined override value unchanged.

5. To edit your override settings, define the sections for the type you want to change (Price, Handling Time, Condition, Seller Notes).
   - **Price**: Tap the **Change Listing Price** radio button. Enter your defined price value for **Price Override**.
   - **Handling Time**: Tap the **Change Handling Time** radio button. Enter the defined time value (in days) for **Handling Time Override**.
   - **Condition**: Tap the **Change Condition** radio button. Select the correct option for **Condition Override**.
   - **Seller Notes**: Tap the **Change Seller Notes** radio button. Enter your notes text for **Seller Notes Override**.

6. To remove an override type, tap the **Remove** radio button for each of the types you want to remove. If not removed, the previously defined value remains in the override.

7. Tap **Save Listing Override**.

The Product Listing Overrides screen closes. The status of the listings changes to "Relist in Progress." The change will be published to Amazon with your next data sync (as configured in your cron settings). If not already listed, the listings are also added to the Overrides tab.

**Override Types**

<table>
<thead>
<tr>
<th>OVERRIDE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Override</td>
<td>A price override defines the price for the listings. This override takes priority over all automated settings until the override is removed.</td>
</tr>
</tbody>
</table>

To override the price of your product, select the **Change Listing Price** radio button and then enter the new price in the Price Override field.
### Override Types (cont.)

<table>
<thead>
<tr>
<th>OVERRIDE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling Time Override</td>
<td>A handling time override defines the time it takes (in days) to process and ship products. A handling time override takes priority over all automated and default handling time settings until the override is removed. The value that exists in the Handling Time Override box is either your default handling time defined in your listing settings or your defined override handling time. If you remove a handling time override, the listing will default to the handling time defined in your listing settings. To define a handling time override, select the <strong>Change Handling Time</strong> radio button, and then enter the new handling time (in days) in the Handling Time Override field.</td>
</tr>
<tr>
<td>Condition Override</td>
<td>To override the Listing Condition, select the <strong>Change Condition</strong> radio button and then select the new condition from the Condition Override drop-down.</td>
</tr>
<tr>
<td>Seller Notes Override</td>
<td>For products in your catalog that are defined with a condition other than &quot;New,&quot; a seller note can be added to further detail your product and its condition to potential buyers. You can enter a seller note override for a &quot;New&quot; condition product, but Amazon will not display the note. To override the Seller Notes, select the <strong>Change Seller Notes</strong> radio button and then enter the new note in the Seller Notes Override field.</td>
</tr>
</tbody>
</table>
Creating an Alias Amazon Seller SKU

An Alias Amazon Seller SKU is used to create a new Amazon listing from same product in your Magento catalog. If you are an experienced Amazon seller, you may be familiar with the Amazon Global SKU and Marketplace-specific SKU for inventory and shipping. Following similar principles for Amazon Sales Channel, the Amazon Seller SKU controls product listing information at multi-regional level, and the Alias Amazon Seller SKU can be used to control product listing information at a region-specific level.

This function can be used to perform two functions:

- Create an Alias Amazon Seller SKU for one of your Magento catalog products to control region-specific listing information

**Example:** You are a seller in both the US and the Canada regions. Remember, each of your Amazon Sales Channel stores can only be assigned one Amazon region during setup. This means that you have an Amazon Sales Channel store with a defined US region and another store with a defined Canada region. Both stores share your Magento catalog for listing information across both regions, including the Amazon Seller SKU and ASIN product attributes. So, listings for the catalog product would be the same in both stores, sharing pricing, stock/quantity, and other product attributes. But, your stock for your Canada store ships from a Canada location, and your US store ships from a US location. Thus, you need to control the listing quantity for the listing separately for each store. To accomplish this type of region-specific control, you can create an Alias Amazon Seller SKU.

Essentially, you can create an Alias Amazon Seller SKU that is linked to the same catalog product and can be used to republish the same listing in that region.

- Create an Alias Amazon Seller SKU and match one of your Magento catalog products to two Amazon listings

**Example:** You have a catalog product that is matched to an Amazon listing. As Amazon frequently has multiple listings that represent the same product, you discover another Amazon listing for the same product, but Amazon has assigned a different ASIN to the listing. To increase your product visibility to include, you want to match your catalog product to the different ASIN and create listings for both ASIN values. To accomplish this, you can create an Alias Amazon Seller SKU.

Essentially, you can create an Alias Amazon Seller SKU that can be used to match a single catalog product to a second Amazon listing and create a new listing for the newly matched ASIN. In this scenario, you would have two Amazon listings for the same catalog product. After you've created an Alias Amazon Seller SKU, you can use your listing settings, rules, and overrides to control the listing information for the region. Product attributes that can be defined per region for a listing include quantity/stock, fulfillment method, condition, product eligibility, and handling time.
To create an Alias Amazon Seller SKU to be used for a region-specific purpose

1. View the listing in one of the Product Listing screens (Inactive, Active, Ineligible, or Ended).
2. In the Action column, tap Create Alias Seller SKU.
3. For Assign New Seller SKU, enter a unique alphanumeric value.
   This must be a unique value not used for any other product or alias in your catalog.
4. For Assign New ASIN, make no change.
   This value auto-populates with the ASIN that is matched to your catalog product. Changing this value will match your catalog product to two Amazon listings based on the ASIN.
5. Toggle the Remove Existing Seller SKU option to Yes or No.
   Yes: Select this option to delete the listing and create a new listing using the new information provided.
   No: Select this option to create a new listing and keep the old listing unchanged.
6. Tap Save Listing Update.

To create an Alias Amazon Seller SKU to be used to match a single catalog product to two Amazon listings

1. View the listing in one of the Product Listing screens (Inactive, Active, Ineligible, or Ended).
2. In the Action column, tap Create Alias Seller SKU.
3. For Assign New Seller SKU, enter a unique alphanumeric value.
   This must be a unique value not used for any other product or alias in your catalog.
4. For Assign New ASIN, enter a unique alphanumeric value.
   This value auto-populates with the ASIN that is matched to your catalog product. Changing this value will match your catalog product to two Amazon listings based on the ASIN.
5. Toggle the Remove Existing Seller SKU option to Yes or No.
   Yes: Select this option to delete the listing and create a new listing using the new information provided.
   No: Select this option to create a new listing and keep the old listing unchanged.
6. Tap Save Listing Update.
## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign New Seller SKU</td>
<td>Enter a new, unique alphanumeric value to be linked to the original Amazon Seller SKU. This number is only used by Amazon Sales Channel to match to your catalog product. You can use any SKU value, but the value can only be used once in your catalog.</td>
</tr>
<tr>
<td>Assign New ASIN</td>
<td>Enter the ASIN value for the listing to which you want to match your catalog product. Only modify this field when matching a single catalog product to the ASIN for another listing for the same product. This value must match the ASIN assigned by Amazon or the listing will not be rejected by Amazon.</td>
</tr>
<tr>
<td>Remove Existing Seller SKU</td>
<td>Options:&lt;br&gt;&lt;br&gt;<strong>Yes:</strong> Select this option to delete the listing and create a new listing using the new information provided. The new listing will display in the Active tab, and the old listing will move to the Ended tab.&lt;br&gt;&lt;br&gt;<strong>No:</strong> Select this option to create a new listing and keep the old listing unchanged. Both listings will display in the Active tab once the new listing is created.</td>
</tr>
</tbody>
</table>
Edit an Assigned ASIN

You can edit the Amazon ASIN value assigned to a product in yourMagento catalog. This is a helpful feature if a catalog product was improperly matched to one of your Amazon listings. Changing the assigned ASIN for the listing does not change the ASIN assigned to a product by Amazon. It only changes the Amazon listing to which your catalog product is matched.

When an assigned ASIN is changed, Magento ends your Amazon listings attached to the old ASIN, validates the ASIN with Amazon, creates a new listing for the updated ASIN, and updates listing information in Amazon Sales Channel.

To edit an assigned ASIN

1. View the listing in one of the Product Listing screens (Inactive, Active, or Ineligible).
2. In the Action column, tap Edit Assigned ASIN. The Product Listing Update screen displays.
3. Enter the new ASIN value in the Assign ASIN field.
4. Tap Save Listing Update to save your changes.

Ending an Amazon Listing

To manually end a single or multiple Amazon listings

1. View the listing(s) on the Active tab in Managing Listings.
2. In the left-side column, tap to check each of the listings you wish to end.
3. In the Actions drop-down, tap End listing(s) on Amazon.
4. Tap OK on the confirmation message that displays.
To manually end a single Amazon listing

1. View the listing on the Active tab in Managing Listings.
2. In the Action column for the listing, tap Select and tap End Listing.
3. Tap OK on the confirmation message that displays.

When ending a listing, a confirmation message displays that the selected listing is being processed to end. Ended listings can be managed on the Ended tab in Manage Listings. Once processed and removed from Amazon, the status for the listing will display as "Manually Ended." Ended listings will remain removed from Amazon until you manually republish the listing using the Republish to Amazon action.

Update Required Info (Incomplete Listing)

Listings that display on the Incomplete tab include your Magento catalog products that meet your Amazon eligibility requirements as defined in your listing rules but are missing information required by Amazon before listing.

To update required info (Unable to Assign To Amazon Listing)

1. View the listing(s) on the Incomplete tab in Manage Listings.
2. In the Action column for the listing, tap Select and tap Update Required Info.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For Assign ASIN, enter the ASIN assigned by Amazon for the listing you want to match to the catalog product displayed.
5. Tap Save Listing Update to save the product match.

The listing is now matched to your catalog, and the listing will be updated and published to Amazon based on your cron and listing settings. The listing will move from the Incomplete tab.

Example: Manually assign ASIN for no listing match
To update required info (Multiple Matches Found)

1. View the listing(s) on the Incomplete tab in Manage Listings.
2. In the Action column for the listing, tap Select and tap Update Required Info.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For Select Correct Amazon Listing, select the correct ASIN for the listing you wish to match to this product.
   Catalog products that are identified as possible matches will display in the drop-down.
   If none of the displayed options are correct, you can select "Manually Enter Correct ASIN" and manually enter the ASIN for the product.
5. If entering the ASIN manually, enter the correct ASIN for Manually Assign ASIN.
6. Tap Save Listing Update to save the product match.

Example: Manually select ASIN from multiple possible matches

To update required info (Has Variants)

1. View the listing(s) on the Incomplete tab in Manage Listings.
2. In the Action column for the listing, tap Select and tap Update Required Info.
3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.
4. For Select Correct Amazon Listing, select the correct ASIN for the listing you wish to match to this product.
   Catalog products that are identified as possible matches will display in the drop-down.
   If none of the displayed options are correct, you can select "Manually Enter Correct ASIN" and manually enter the ASIN for the product.
5. If entering the ASIN manually, enter the correct ASIN for Manually Assign ASIN.
6. Tap **Save Listing Update** to save the product match.

![Product Listing Update](image)

**Example: Manually select ASIN from possible variant matches**

**To update required info (Missing Condition)**

1. View the listing(s) on the Incomplete tab in Manage Listings.

2. In the Action column for the listing, tap Select and tap **Update Required Info**.

3. Review the catalog product information (SKU and Product Name) for which you are trying to match to an Amazon listing.

4. For **Condition**, select the appropriate condition in the drop-down. The list of options available is dependent on your Product Listing Condition settings.

5. Tap **Save Listing Update** to save the product match.

![Product Listing Update](image)

**Example: Manually update missing condition**
View Listing Details

The Product Listing Details page provides additional information on your active products, including the Listing Activity Log which displays the changes on an individual SKU / Product. This information can help you understand competitive metrics on your products and on individual SKU/product changes.

- **Listing Details**: Product details including the Name and Amazon Seller SKU.
- **Listing Activity Log**: Historical record of all the changes that have occurred for this listing, such as pricing and quantity/stock changes. No further actions are required. This is provided for review to understand the change history.
- **Buy Box Competitor Pricing**: This displays data on Amazon's Buy Box status and competitor pricing.
- **Lowest Competitor Pricing**: This displays the lowest Amazon competitor's pricing and feedback information.

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

**Listing Details**

Displays product information includes:

- Amazon Name
- Catalog (Magento) SKU
- Amazon Seller SKU

**Listing Activity Log**

Displays all recent activity for the Amazon listing. Information displayed includes:

- Amazon Seller SKU: Identifies the Stock Keeping Unit (SKU) defined for the listing.
- ASIN: Identifies the 10-digit Amazon product identifier.
• Listing Action: Identifies the type of action that occurred for the listing.
• Comments: Provides additional details related to the type of listing action that occurred.
• Executed At: Identifies the date and time the action occurred.

Product Listing Details: Listing Activity Log

Buy Box Competitor Pricing
Displays information for the Amazon merchant who holds the Buy Box position for the listing. This can be used to understand the price positioning of your competitors on Amazon. Information displayed includes:

• ASIN: The 10-digit Amazon product identifier.
• Is Seller: Identifies if you are the Buy Box seller. Options Yes/No.
• Condition: Identifies the condition defined for the listing.
• Listing Price: Identifies the price at which the listing was published.
• Shipping Price: Identifies the shipping price added to the listing.
• Landed Price: Identifies the listing price plus the shipping price for the listing.
• Last Updated: Identifies the date and time the pricing information was updated from Amazon.
Lowest Competitor Pricing
Displays information about Amazon competitors for the same listing. This can be used to understand the price positioning of your competitors on Amazon. Information displayed includes:

- ASIN: The 10-digit Amazon product identifier.
- Condition: Identifies the condition defined for the listing.
- Fulfillment Channel: Identifies the party responsible for fulfillment. Options: Merchant/Amazon.
- Listing Price: Identifies the price at which the listing was published.
- Shipping Price: Identifies the shipping price added to the listing.
- Landed Price: Identifies the listing price plus the shipping price for the listing.
- Feedback Rating: Identifies the Amazon feedback rating for the lowest price merchant.
- Feedback Count: Identifies the Amazon feedback count for the lowest price merchant.
- Last Updated: Identifies the date and time the pricing information was updated from Amazon.

Product Listing Details: Lowest Competitor Pricing
Managing Orders and Fulfillment

Amazon Sales Channel imports your Amazon Seller Central orders into Magento for review on the Orders tab in Amazon Sales Channel Home.

Orders that are imported:

- Orders that are in "Unshipped" status in your Amazon Seller Central account at the time of store integration during onboarding.
- All new orders in your Amazon Seller Central account after store integration.

Orders that are not imported:

- Orders that existed in your Amazon Seller Central account at the time of store integration but were in a status other than "Unshipped."

An Amazon order is added to the to the Orders tab when Amazon Sales Channel receives information that Amazon has changed the order status from "Pending" to "Unshipped" in Amazon Seller Central. Amazon places an order in "Pending" status while the order and the payment method are verified. Remember, information sync depends on your cron settings and the time it takes Amazon to process information.

You can review your Amazon order information on the Orders tab.

If your order settings are defined to create a corresponding Magento order for your Amazon orders, you can manage your orders the same way you process your Magento orders. If your order settings are set to not create corresponding Magento orders, you can review your order information on the Orders tab but must manage your orders in Amazon Seller Central.

When managing Amazon orders in Amazon Sales Channel, you will use the Magento Order Management processes and workflows. When you tap the Magento order number for the order, the order displays in a new tab the same as if you accessed the order in Sales grid in the admin panel.

To view your Amazon order information:

1. On the Admin sidebar, tap Marketing. Then, under Channels, tap Amazon.
2. In Amazon Sales Channel Home, tap the Orders tab.
3. If you want to view additional details for an individual order, tap View Amazon Order Details in the Action column.

   This displays the Amazon Order Details screen to view the details for the selected order.

4. If you want to manage an individual order, tap the number in the Magento Order Number column.

   This displays the Magento order processing screen in a new tab.

See Common Order Processing Tasks
### Order Management

![Amazon Sales Channel Home](image)

<table>
<thead>
<tr>
<th>Amazon Order Number</th>
<th>Merchant Order Number</th>
<th>Merchant</th>
<th>Sales Channel</th>
<th>Status</th>
<th>Order Date</th>
<th>Purchase Date</th>
<th>Last Update</th>
<th>Last Action</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>T123456789</td>
<td>ABC12345</td>
<td>Merchant</td>
<td></td>
<td>Shipped</td>
<td>2023-05-15</td>
<td>2023-05-16</td>
<td>2023-05-17</td>
<td>View</td>
<td>Details</td>
</tr>
<tr>
<td>T987654321</td>
<td>DEF789012</td>
<td>Merchant</td>
<td></td>
<td>Shipped</td>
<td>2023-05-17</td>
<td>2023-05-18</td>
<td>2023-05-19</td>
<td>View</td>
<td>Details</td>
</tr>
</tbody>
</table>

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*Note: Image and table details are for illustrative purposes only.*
Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

### Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Order Number</td>
<td>The order number generated by your Amazon Central Seller account and imported into Magento.</td>
</tr>
<tr>
<td>Amazon Store Name</td>
<td>The name of the Amazon store in which the order was placed. Click the store name to view the store’s dashboard.</td>
</tr>
<tr>
<td>Magento Order Number</td>
<td>The corresponding order number created by Magento when the order information is received from your Amazon Seller Central account (if set to create a corresponding order in your order settings). Tap the number to view and manage the order similar to Processing a Magento Order.</td>
</tr>
<tr>
<td>Buyer Name</td>
<td>The name of the person who placed the order as received from Amazon Seller Central.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the order. Options:</td>
</tr>
<tr>
<td></td>
<td>- Pending</td>
</tr>
<tr>
<td></td>
<td>- Unshipped</td>
</tr>
<tr>
<td></td>
<td>- Shipped</td>
</tr>
<tr>
<td></td>
<td>- Canceled</td>
</tr>
<tr>
<td></td>
<td>- Completed</td>
</tr>
<tr>
<td></td>
<td>- Partially Shipped</td>
</tr>
<tr>
<td>Total</td>
<td>The total dollar value of the order as received from Amazon Seller Central.</td>
</tr>
<tr>
<td>Fulfillment Channel</td>
<td>Identifies the party responsible for sorting, packing, and shipping of an order. Options:</td>
</tr>
<tr>
<td></td>
<td>- Merchant</td>
</tr>
<tr>
<td></td>
<td>- Amazon</td>
</tr>
<tr>
<td>Items Unshipped</td>
<td>The number of items in the order that have not yet been shipped.</td>
</tr>
<tr>
<td>Reserved</td>
<td>Based on your order settings, if &quot;Pending Orders&quot; status is set to reserve quantity in your stock, then this will display &quot;Yes&quot; or &quot;No&quot; accordingly. If set to &quot;Yes:&quot;</td>
</tr>
<tr>
<td></td>
<td>- When the order is processed by Amazon Seller Central and the corresponding Magento order is created, the reserve quantity.</td>
</tr>
</tbody>
</table>
Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Date</td>
<td>The date of the purchase as received from Amazon Seller Central.</td>
</tr>
<tr>
<td>Latest Ship Date</td>
<td>The latest date that Amazon Seller Central expects you to ship the order so that it arrives on time. This is very important for maintaining your Amazon Seller Central business score.</td>
</tr>
<tr>
<td>Last Action</td>
<td>A custom message from Amazon Seller Central to Amazon Sales Channel that explains the action was last taken for the order. This allows the merchant to have a single location in Amazon Sales Channel to view the status of Amazon Seller Central orders. The last action text may let the store owner know that an Amazon Seller Central order has been canceled, that the Amazon Seller Central has successfully invoiced the order payment, that the system attempted to create a new Magento order but was unable to, or that a corresponding Magento order was successfully created.</td>
</tr>
<tr>
<td>Action</td>
<td><strong>View Amazon Order Details</strong></td>
</tr>
<tr>
<td></td>
<td>The order amount, customer email, customer name, and Magento order number (if set to create a corresponding order) populate when the order is added to the Orders tab.</td>
</tr>
</tbody>
</table>

Optional Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Id</td>
<td>This is the identifier assigned by Magento for the Amazon order when the order was received from Amazon and created in the Amazon Sales Channel.</td>
</tr>
<tr>
<td>Merchant Id</td>
<td>This is the number assigned by Magento to the Amazon store you created and integrated with an Amazon Seller Central account.</td>
</tr>
<tr>
<td>Is Prime</td>
<td>Identifies the order as using the Amazon Prime shipping option. Options: Yes/No.</td>
</tr>
<tr>
<td>Purchase Order Number</td>
<td></td>
</tr>
<tr>
<td>Is Replacement</td>
<td></td>
</tr>
<tr>
<td>Items Shipped</td>
<td>Identifies the number of items in the order in Shipped status.</td>
</tr>
</tbody>
</table>
Order Settings

Your order settings are configured first during onboarding, but can be modified at any time. You can access your order settings for an Active or Inactive store in the store’s dashboard. In the I Want To... section, tap Order Settings. The Order Settings screen displays.

Order Settings define how Amazon orders are imported into and processed in Magento.

Beginning when you integrate Amazon Sales Channel with your Amazon Seller Central account during onboarding, Amazon orders import and create new orders in Amazon Sales Channel. Amazon orders are imported and create new orders when the Amazon sets the order status to "Unshipped." Orders that existed in Amazon in any status other than "Unshipped" prior to your store's integration will not import.

When an order is created on Amazon, it is not immediately imported into Amazon Sales Channel. Amazon assigns a "Pending" status to newly created orders. Once Amazon verifies the order and payment method, Amazon changes the order's status to "Unshipped." This status change triggers Amazon Sales Channel to import the order and create a corresponding order. Amazon Sales Channel creates a matching order that corresponds to the Amazon order. Orders created in Amazon Sales Channel display and can be managed in the Orders tab in Amazon Sales Channel Home.

**To configure Order Settings:**

1. Tap Order Settings in the onboarding progress bar.
2. For Import Amazon Orders (required), choose an option in the drop-down:
   - **Disabled**: Select this option if you do not want to create corresponding orders in Magento when new orders are received from Amazon. When this option is selected, all other fields on this screen are disabled.
   - **Enabled**: Select this option if you want to create corresponding Magento orders when new orders are received from Amazon. Magento orders are created based on Amazon status and stock levels.

   "Enabled" must be selected to manage Amazon orders in Amazon Sales Channel. When "Disabled" is selected, your Amazon orders will display in the Orders tab but will not have a corresponding Magento order number and cannot be managed in Amazon Sales Channel. Information for these orders is for review only. You must manage these orders in your Amazon Seller Central account.

3. For Import Amazon Orders Into Magento Store (required), select which Magento Store the Amazon orders will be associated with when they are created in the Magento Order grid. The list of options in this drop-down is dependent on the Magento stores you have set up in your configuration. See Stores.
4. For Customer Creation, select an option in the drop-down. Options:
• **No Customer Creation (guest):** Select this option if you do not want to create a
  customer account in Magento using the imported customer data from the Amazon
  order. When selected, this option tells Magento to process an imported Amazon order
  the same way it processes a guest checkout in Magento.

• **Build New Customer Account:** Select this option if you want to create a New Customer
  Account in Magento using the customer data imported with the Amazon order.
  Selecting this option builds your customer database from your Amazon orders.

5. For **Order Number Source**, select an option in the drop-down. Options:

  - **Build Using Magento Order Number:** Select this option if you want to create a unique
    Magento order number for the corresponding Amazon order using the Magento
    incrementally-assigned order ID.

  - **Build Using Amazon Order Number:** Select this option if you want to create the
    Magento order number using the corresponding Amazon-assigned order number.

    Once an order is imported, the Amazon Order Number and the Magento Order Number display in
    the Orders tab.

6. For **Pending Orders** (required), select an option in the drop-down. Options:

  - **Do Not Reserve Quantity:** Select this option when you do not want your Magento stock
    quantity affected by your Amazon orders. Select this option if you use Amazon for your
    fulfillment process (FBA). When this option is selected and you receive an Amazon
    order, the quantity ordered will not affect your Magento stock quantity.

  - **Reserve Quantity:** Select this option when you want the order quantity in the Amazon
    order to be "reserved" in your Magento stock quantity. When this option is selected and
    you receive an Amazon order, the quantity ordered will "reserve" in your Magento stock
    quantity to prevent your Magento stock from "over selling."

    Remember, Amazon orders do not import into and create new orders in Magento until Amazon
    verifies the order and payment method changes the order status to "Unshipped."

7. For **Order Status** (required), select an option from the drop-down. Options:

  - **Default Order Status:** Select this option when you want newly created orders imported
    from Amazon to be assigned your defined default order status for new orders. The
    default status for new orders (unless you have created a custom order status for new
    orders) is "Pending." See Processing Orders.
**Custom Order Status**: Select this option when you want newly created orders imported from Amazon to be assigned a status other than the default. When this option is selected, the Processing Order Status field enables for you to select the status you want to use for newly created orders imported from Amazon.

**Processing Order Status**: Select an option in the drop-down. The options that display in this field are based on the default status options in Magento. See Order Status. You can also create a custom order status to display here for selection. To create a custom order status, see Custom Order Status.

---

**Order Settings**

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Amazon Orders</td>
<td>Options:</td>
</tr>
<tr>
<td>Import Amazon Orders into Magento Store</td>
<td>Disabled: Select this option if you do not want to create corresponding orders in Magento when new orders are received from Amazon. When this option is selected, all other fields on this screen are disabled.</td>
</tr>
<tr>
<td>Order Status</td>
<td>Enabled: Select this option if you want to create corresponding Magento orders when new orders are received from Amazon. Magento orders are created based on Amazon status and stock levels.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Enabled&quot;</td>
<td>Must be selected to manage Amazon orders in Amazon Sales Channel. When &quot;Disabled&quot; is selected, your Amazon orders will display in the Orders tab but will not have a corresponding Magento order number and cannot be managed in Amazon Sales Channel. Information for these orders is for review only. You must manage these orders in your Amazon Seller Central account.</td>
</tr>
<tr>
<td>Import Amazon Orders Into Magento Store</td>
<td>Select which Magento Store the Amazon orders will be associated with when they are created in the Magento Order grid. The list of options in this drop-down is dependent on the Magento stores you have set up in your configuration. See Stores.</td>
</tr>
<tr>
<td>Customer Creation Options:</td>
<td></td>
</tr>
<tr>
<td>No Customer Creation (guest):</td>
<td>Select this option if you do not want to create a customer account in Magento using the imported customer data from the Amazon order. When selected, this option tells Amazon Sales Channel to process an imported Amazon order the same way it processes a guest checkout in Magento.</td>
</tr>
<tr>
<td>Build New Customer Account:</td>
<td>Select this option if you want to create a New Customer Account in your Magento customer database using the customer data imported with the Amazon order. Selecting this option builds your customer database from your Amazon orders.</td>
</tr>
<tr>
<td>Order Number Source Options:</td>
<td></td>
</tr>
<tr>
<td>Build Using Magento Order Number:</td>
<td>Select this option if you want to create a unique Amazon Sales Channel order number for the corresponding Amazon order using the Magento incrementally-assigned order ID.</td>
</tr>
<tr>
<td>Build Using Amazon Order Number:</td>
<td>Select this option if you want to create the Magento order number using the corresponding Amazon-assigned order number.</td>
</tr>
<tr>
<td>Pending Orders Options:</td>
<td></td>
</tr>
</tbody>
</table>
| Do Not Reserve Quantity: | Select this option when you do not want your Magento stock quantity affected by your Amazon
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>orders. Selected this option if you use Amazon for your fulfillment process (FBA). When this option is selected and you receive an Amazon order, the quantity ordered will not affect your Magento stock quantity.</td>
</tr>
<tr>
<td></td>
<td><strong>Reserve Quantity:</strong> Select this option when you want the order quantity in the Amazon order to be &quot;reserved&quot; in your Magento stock quantity. When this option is selected and you receive an Amazon order, the quantity ordered will &quot;reserve&quot; in your Magento stock quantity to prevent your Magento stock from &quot;over selling.&quot; The reserved quantity will not be available for purchase through your Magento storefront.</td>
</tr>
<tr>
<td>Order Status</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td><strong>Default Order Status:</strong> Select this option when you want newly created orders imported from Amazon to be assigned your defined default order status for new orders. The default status for new orders (unless you have created a custom order status for new orders) is &quot;Pending.&quot; See Processing Orders.</td>
</tr>
<tr>
<td></td>
<td><strong>Custom Order Status:</strong> Select this option when you want newly created orders imported from Amazon to be assigned a status other than the default. When this option is selected, the Processing Order Status field enables you to select the status you want to use for newly created orders imported from Amazon.</td>
</tr>
<tr>
<td>Processing Order Status</td>
<td>Enables when Order Status is set to &quot;Custom Order Status.&quot; Select an option in the drop-down. The options that display in this field are based on the default status options in Magento. See Order Status. You can also create a custom order status to display here for selection. To create a custom order status, see Custom Order Status.</td>
</tr>
</tbody>
</table>

Magento Order Creation

Magento orders are created for Amazon orders based on the following status and inventory conditions.
# Order Creation without Multi Source Inventory (MSI)

<table>
<thead>
<tr>
<th>FULFILLMENT CHANNEL</th>
<th>MAGENTO INVENTORY STATUS</th>
<th>AMAZON ORDER STATUS</th>
<th>CREATE MAGENTO ORDER?</th>
<th>RESERVE INVENTORY Y = YES</th>
<th>RESERVE INVENTORY Y = NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Pending</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Pending Availability</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Canceled</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Error</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Unshipped</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>PartiallyShipped</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Shipped</td>
<td>Yes</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Pending</td>
<td>No</td>
<td>Inventory reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Pending Availability</td>
<td>No</td>
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<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Canceled</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Error</td>
<td>No</td>
<td>Inventory not reserved</td>
<td>Inventory not reserved</td>
</tr>
</tbody>
</table>
### Order Creation without Multi Source Inventory (MSI) (cont.)

<table>
<thead>
<tr>
<th>FULFILLMENT CHANNEL</th>
<th>MAGENTO INVENTORY STATUS</th>
<th>AMAZON ORDER STATUS</th>
<th>CREATE MAGENTO ORDER?</th>
<th>RESERVE INVENTORY = YES</th>
<th>RESERVE INVENTORY = NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Unshipped</td>
<td>Yes</td>
<td>Inventory reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>PartiallyShipped</td>
<td>Yes</td>
<td>Inventory reserved</td>
<td>Inventory not reserved</td>
</tr>
<tr>
<td>FBM</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Shipped</td>
<td>Yes</td>
<td>Inventory reserved</td>
<td>Inventory not reserved</td>
</tr>
</tbody>
</table>

### Order Creation with Multi Source Inventory (MSI)

<table>
<thead>
<tr>
<th>FULFILLMENT CHANNEL</th>
<th>MAGENTO INVENTORY STATUS</th>
<th>AMAZON ORDER STATUS</th>
<th>CREATE MAGENTO ORDER?</th>
<th>INVENTORY RESERVED?</th>
</tr>
</thead>
<tbody>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Pending</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>PendingAvailability</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
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<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>Unshipped</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
### Order Creation with Multi Source Inventory (MSI) (cont.)

<table>
<thead>
<tr>
<th>Fulfillment Channel</th>
<th>Magento Inventory Status</th>
<th>Amazon Order Status</th>
<th>Create Magento Order?</th>
<th>Inventory Reserved?</th>
</tr>
</thead>
<tbody>
<tr>
<td>FBA</td>
<td>In-stock/Out-of-stock/Do Not Manage</td>
<td>PartiallyShipped</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>FBA</td>
<td>In-stock/Do Not Manage</td>
<td>Shipped</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FBA</td>
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<td>Shipped</td>
<td>No</td>
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<td>Shipped</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>FBM</td>
<td>Out-of-stock</td>
<td>Shipped</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
If an Amazon order is imported in a "Partially Shipped" or "Shipped" status, the inventory reservation that is created will be for all items in the order. Amazon Sales Channel does not compensate for items that have been previously shipped. This behavior is the same in both non-MSI and MSI integrations.

If an order is Fulfilled by Amazon (FBA) but an item is in "out of stock" status, Amazon Sales Channel is unable to create a Magento order. This is a limitation of MSI integrations.
Amazon Order Details

When viewing the details of an Amazon order:

- The Order and Shipping Details tab displays additional detailed order information.
- The Order Items tab displays all items associated with the selected Amazon order.
- The Tracking tab displays tracking information associated with the selected Amazon order.

If an order is in "Unshipped" status, the Cancel Order option will display in the header bar.

To cancel and order in "Unshipped" status:

1. View the order on the Orders tab in Amazon Sales Channel Home.
2. Tap View Amazon Order Details in the Action column.
3. Tap Cancel Order in the header bar. If the order is not in "Unshipped" status, "Cancel Order" will not display.
4. For Reason For Cancellation, select an option.
5. Tap Cancel Order in the header bar. The order is canceled, and the Status column for the order on the Order tab is updated to "Canceled."
CHAPTER 46: Amazon Sales Channel

Order and Shipping Details tab

Order Items tab

Order Item Details
Tracking tab

To cancel an unshipped order:

1. On the Amazon Sales Channel Home > Orders screen, locate the order you want to cancel in the list.

2. Verify the order's Status as Unshipped. Then tap View Amazon Order Details in the Action column.

3. On the Amazon Order Details screen, tap Cancel Order.

You will be prompted to enter a reason for the cancellation, and then confirm. The cancellation notification will be sent to your Amazon Seller Central account, and the customer associated with the order will be properly notified. The status of the corresponding Magento order will change to Complete.

Orders can only be canceled if they are in an Unshipped status. If the order is pending or partially shipped (unshipped), the order can only be canceled through your Amazon Seller Central account.

Common Order Processing Tasks

Amazon Sales Channel can manage your Amazon orders, including emailing the buyer, fulfilling the order (shipping), issuing credits/refunds, adding comments, and more. To manage your Amazon orders, your order settings must be set to create corresponding Magento orders when Amazon orders are received. Amazon order information displays on the Orders tab in Amazon Sales Channel Home.

When corresponding Magento orders are created for Amazon orders, the assigned number displays in the Magento Order Number column. Tapping the order number opens the order in the Magento order processing screen in a new tab. You can process the order as you do your other Magento orders.

When processing an Amazon order, Amazon Sales Channel updates and syncs the order information with your Amazon Seller Central account. Your cron settings determine how often order information is synched between Amazon and Amazon Sales Channel.
Common Magento order processing tasks include:

- Issuing a credit/refund
- Fulfilling/shipping an order
- Create an invoice
- Cancel an order

If an order is in "Unshipped" status, you can cancel an Amazon order on the Amazon Order Details screen. If an order has been shipped, it cannot be canceled.

See Magento Order Management.
Amazon Fulfillment Workflows

Example: Fulfilled by Merchant

1. A merchant-fulfilled order is placed on Amazon. Amazon assigns a status of "Pending" until the customer's credit card information is verified. Orders in "Pending" status automatically import into Amazon Sales Channel but do not display on the Orders tab.

2. The order is verified by Amazon. When verified, Amazon changes the status to "Unshipped." With this status change, the order is updated in Amazon Sales Channel and displayed in the Order tab.

3. The order details are updated. Amazon Sales Channel updates the order details with the price, customer email, and customer name. During this update, the Amazon order will create the corresponding Magento order in the Magento order management screen. The Magento order number will display with the order information on the Orders tab.

4. A new customer account is created. If configured in your order settings and the customer does not exist in your Magento database, a new customer is created in your Magento database using the corresponding customer information from the Amazon order. If you selected "No Customer Creation (guest)" in your order settings, the order will follow the Magento guest process and not create a new customer in your database. At this point, if your Magento system is integrated with an ERP/OMS/WMS, the order will be picked up per the integration of a new order being placed and created inside Magento.

5. The order is shipped. From the Magento order processing screen, you will ship the order and add a tracking number. Once all items are marked in a "Shipped" status
   - The status of the Magento order will change to "Complete."
   - The status of the Amazon Sales Channel order will change to "Shipped."
   - The tracking number will be synced to Amazon, and the status of the order in Amazon will change to "Shipped."
   - Shipping notifications will be sent to the customer via Amazon, not from Magento (per Amazon’s policies).
Example: Fulfilled by Amazon (FBA)

1. An Amazon-fulfilled order is placed on Amazon.

2. The order is imported. The order is not imported into Amazon Sales Channel until the order is assigned the "Shipped" status by Amazon. Since Amazon has the inventory for this product, this prevents interference with your warehouse/inventory management.

3. The order details are updated. If configured in your order settings, the Amazon order will create the corresponding Magento order and be created as an order with a status of "Complete."

Logs and Store Reports

Amazon Sales Channel includes some valuable log and reporting features. These features allow you to view the changes that have occurred in Amazon Sales Channel that are affecting your Amazon listings and orders. This is a very important feature to make sure the desired changes are being made and to understand various listing statuses.

No actions are available for the logs or reports, as they are review-only features.

The following logs apply to Amazon Sales Channel and are not store specific. These logs can be accessed on Amazon Sales Channel Home.

- The Listing Changes Log displays the changes that have occurred in your Amazon Seller Account as a reflection of your Amazon Sales Channel settings.
- The Communication Errors Log displays any reported communication errors with Amazon.

The following reports are store-specific and can be accessed when viewing each store's dashboard.

- The Competitive Price Analysis report displays your Amazon landed price (listing price plus shipping price) in relation to the Buy Box price and lowest competitor price.
- The Listing Improvements report displays all suggested listing improvements provided by Amazon for the selected store.
Listing Changes Log

The Listing Changes Log displays the changes that have occurred in your Amazon Seller Account as a reflection of your Amazon Sales Channel settings. This log indicates the global changes that have been synced between Amazon and Amazon Sales Channel. This log includes listing changes for a product SKU such as the type of action (change), brief description of the change, and the date of the change.

No actions are available for the log. It is a review-only feature.

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

### Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Store Name</td>
<td>The name of the store defined when the Amazon store was set up. Refer to Store Integration.</td>
</tr>
<tr>
<td>Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>Listing Action</td>
<td>The type of change that was made to the listing.</td>
</tr>
<tr>
<td>Comments</td>
<td>Additional information about the listing change.</td>
</tr>
<tr>
<td>Created On</td>
<td>The date and time the change was made.</td>
</tr>
</tbody>
</table>
Communication Errors Log

The Communication Errors Log displays any reported communication errors with Amazon. Information includes the affected Amazon Sales Channel store, error code and brief description, and the date and time of the error.

No actions are available for the log. It is a review-only feature.

Amazon Sales Channel Home tabs share some common workspace controls that allow you to customize the data that is displayed.

Communication Errors Log

Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Store Name</td>
<td>The name of the store defined when the Amazon store was set up. Refer to Store Integration.</td>
</tr>
<tr>
<td>Error Code</td>
<td>The code received from Amazon to identify the error type.</td>
</tr>
<tr>
<td>Message</td>
<td>The message that describes the error associated to the error code.</td>
</tr>
<tr>
<td>Created On</td>
<td>The date and time the error occurred.</td>
</tr>
</tbody>
</table>
Competitive Price Analysis

The Competitive Price Analysis report displays your Amazon listings per marketplace with the respective Buy Box price and lowest competitor price values. No actions are available for the log. It is a review-only feature.

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items. ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an items ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
</tr>
</tbody>
</table>
Default Columns (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Listing Name</td>
<td>The name of the product.</td>
</tr>
<tr>
<td>Your Landed Price</td>
<td>Your listing price for the product plus its shipping price.</td>
</tr>
<tr>
<td>Lowest Landed Price</td>
<td>The lowest landed price (listing price plus its shipping price) from your Amazon competitors.</td>
</tr>
<tr>
<td>Condition (lowest price)</td>
<td>The condition of the product listed at the lowest price.</td>
</tr>
<tr>
<td>Buy Box Landed Price</td>
<td>The landed price (listing price plus its shipping price) of the Buy Box position listing.</td>
</tr>
<tr>
<td>Is Seller (Buy Box)</td>
<td>Whether or not you have won the Buy Box position for the listing (NA indicates there is no Buy Box price for the listing).</td>
</tr>
<tr>
<td>Condition (Buy Box)</td>
<td>The condition of the Buy Box position listing.</td>
</tr>
</tbody>
</table>

Listing Improvements

The Listing Improvements report displays products with suggestions from Amazon to improve the listing quality. You can review these suggestions, which could help the performance of products within the Amazon listing. No actions are available for the log. It is a review-only feature.

A listing improvement received from Amazon does not prevent your product from being listed with Amazon.
# Default Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon Seller SKU</td>
<td>The SKU (Stock Keeping Unit) assigned by Amazon to a product to identify the product, options, price, and manufacturer.</td>
</tr>
<tr>
<td>ASIN</td>
<td>A unique block of 10 letters and/or numbers that identify items. ASIN stands for the Amazon Standard Identification Numbers. An ASIN is a unique block of 10 letters and/or numbers that identify items. For books, the ASIN is the same as the ISBN number, but for all other products a new ASIN is created when the item is uploaded to their catalog. You can find an item's ASIN on the product detail page on Amazon, along with further details relating to the item.</td>
</tr>
<tr>
<td>Alert Type</td>
<td>Describes the type of issue with the listing. For example, &quot;Missing&quot; indicates that there is a missing required attribute.</td>
</tr>
<tr>
<td>Field Name</td>
<td>The field name in the Amazon seller listing details for which the improvement is being recommended.</td>
</tr>
<tr>
<td>Notes</td>
<td>A description of the suggested improvement received from Amazon.</td>
</tr>
</tbody>
</table>
CONTENT
Contents

In this section of the guide, you’ll learn how to create content and manage the presentation of your store.

- Content Elements
- Design & Theme
CHAPTER 47: Content Menu

The term content marketing 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.

To display the Content menu:

On the Admin sidebar, tap Content.

---

1 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.
Content Elements
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 48: 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\(^1\). 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.

\(^1\)Content that has a long shelf life.
Core Content

The Magento demo store has examples of core content pages to help you get started. All of the pages can be modified to meet your needs. Take a look at the following pages in your store, to make sure that the content conveys your message, voice, and brand.

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.

Access Denied

The “Access Denied” page appears when the permissions that are assigned to a company user prevent access to the page.

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:

```
<table>
<thead>
<tr>
<th>Configuration</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Web URL</td>
<td>cms (store view)</td>
</tr>
<tr>
<td>CMS Home Page</td>
<td>Home Page (store view)</td>
</tr>
<tr>
<td>Default No-route URL</td>
<td>cms/noRoute/index (store view)</td>
</tr>
<tr>
<td>CMS No Route Page</td>
<td>404 Not Found (store view)</td>
</tr>
<tr>
<td>CMS No Cookies Page</td>
<td>Enable Cookies (store view)</td>
</tr>
<tr>
<td>Show Breadcrumbs for CMS Pages</td>
<td>Yes (store view)</td>
</tr>
</tbody>
</table>
```

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.

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.

2. Update any of the following properties:
   - Title
   - URL Key
   - Status
   - Layout

3. When complete, tap Save.
## Workspace Controls

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add New Page</td>
<td>Adds a new page.</td>
</tr>
<tr>
<td>Search</td>
<td>Initiates a catalog search based on the current filters.</td>
</tr>
<tr>
<td>Actions</td>
<td>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</td>
</tr>
<tr>
<td>Select</td>
<td>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</td>
</tr>
<tr>
<td>Save Edits</td>
<td>Applies the current action to selected records.</td>
</tr>
<tr>
<td>Edit</td>
<td>Opens the record in edit mode. You can accomplish the same thing by clicking anywhere on the row.</td>
</tr>
</tbody>
</table>
## Columns

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>The checkbox in the first column is used to select multiple records: Options: Select All, Deselect All</td>
</tr>
<tr>
<td>ID</td>
<td>The ID is an incrementing number that is assigned to each page.</td>
</tr>
<tr>
<td>Title</td>
<td>The page title appears at the top of each page.</td>
</tr>
<tr>
<td>URL Key</td>
<td>The URL key is similar to a file name, and identifies the page in the URL.</td>
</tr>
<tr>
<td>Layout</td>
<td>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</td>
</tr>
<tr>
<td>Store View</td>
<td>Can be used to associate the page with a specific store view.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates if the page is currently online or offline. Options: Enabled / Disabled</td>
</tr>
<tr>
<td>Created</td>
<td>The date the page was created.</td>
</tr>
<tr>
<td>Modified</td>
<td>The data the page was last modified.</td>
</tr>
<tr>
<td>Action</td>
<td>The actions that can be applied to an individual record include: Edit Opens the page in edit mode. Delete Deletes the page. View Displays the page in preview mode.</td>
</tr>
</tbody>
</table>
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.

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.

---

*Filtered Search*
### Search Filters

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Filter the search by page record ID.</td>
</tr>
<tr>
<td>Title</td>
<td>Filter the search based on the page title.</td>
</tr>
<tr>
<td>URL Key</td>
<td>Filter the search by the URL Key.</td>
</tr>
<tr>
<td>Created</td>
<td>Filter the search by the date the page was created.</td>
</tr>
<tr>
<td>Modified</td>
<td>Filter the search based on the date the page was last modified.</td>
</tr>
<tr>
<td>Store View</td>
<td>Filter the search based on store view. Options: (All available Store Views)</td>
</tr>
<tr>
<td>Layout</td>
<td>Filter the search based on page layout. Options:</td>
</tr>
<tr>
<td></td>
<td>1 column</td>
</tr>
<tr>
<td></td>
<td>2 columns with left bar</td>
</tr>
<tr>
<td></td>
<td>2 columns with right bar</td>
</tr>
<tr>
<td></td>
<td>3 columns</td>
</tr>
<tr>
<td></td>
<td>Empty</td>
</tr>
<tr>
<td>Status</td>
<td>Filter the search on the page status. Options: Disables / Published</td>
</tr>
</tbody>
</table>

- **Apply Filters**: Applies all filters to the search.
- **Cancel**: 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.

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
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 ( UIImageView) control. Then, tap **Save Current View**.

   ![Save Current View](image)

2. Enter a **name** for the view. Then, click the **arrow** ( UIImageView) to save all changes. The name of the view now appears as the current view.

To change the view:

Tap the View ( UIImageView) 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** ( UIImageView) icon. Then, update the name.

![Choose a View](image)
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.
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.

### Process Overview:

1. **Step 1: Add a New Page**
2. **Step 2: Complete the Content**
3. **Step 3: Complete the SEO Information**
4. **Step 4: Define the Scope**
5. **Step 5: Make Design Changes (Optional)**
6. **Step 6: Preview the Page**
7. **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**.
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
Step 2: Complete the Content

1. Expand ☑️ the Content section.

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.
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.

**Step 5: Enter Any Design Changes** (Optional)

1. Expand the **Design** section. Then, do the following:
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_pages.png)

   **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.
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 (Ⅱ).

2. After the Image URL field, click Browse (Ⅱ).

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](image)
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** (insert image icon).

2. After the **Image URL** field, click **Browse** (folder icon).

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**.
Method 2: **From HTML Mode**

1. Position the cursor in the code where the `<img>` tag is to be inserted.
2. Tap **Insert Image**.
**Using the Editor**

The 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 on product detail, the editor is accessed by clicking the Show/Hide Editor button. For a complete list of toolbar buttons, see: Using the Editor in the online guide.

![Editor Toolbar](image)

**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](image)

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.

**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.

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.

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 a node does not have a content page 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 to the node. Or you might create a node for a collection of back issues of your newsletter.

To link to a node, use the Widget tool to create a CMS Hierarchy Node Link. Then, place the widget in a content block or page.

![Navigation Menu on About Us Page](image)

**Process Overview:**

1. **Create a Node**
2. **Add Pages to the Node**
3. **Define the Structure**
4. **Add Pagination Controls**
5. **Choose the Menu Layout**
Step 1: Create a Node

1. On the Admin sidebar, tap Content. Then under Elements, choose Hierarchy.

2. Above the grid, tap Add Node. Then, do the following:
   
a. Under Page Properties, type a Title for the node.
   
b. Enter a suitable URL Key in all lowercase characters, using hyphens to separate words, instead of spaces.
   
c. Tap Save. The node appears as a folder in the tree on the left of the page.
Node Added to Page Hierarchy Tree

**Step 2: Add Pages to the Node**

1. In the hierarchy tree, click the node to open it in edit mode.

2. Scroll down to the CMS pages section, and mark the checkbox of each page you want to include in the hierarchy.

3. Tap Add Selected Pages(s) to Tree. Each selected page appears in the tree below the node folder.

Pages Added to Tree
Step 3: Define the Structure

1. If necessary, drag the pages into position to reflect the order that they are to appear in the menu.

   ![Drag Pages into Position]

2. Click the node at the top of the hierarchy. The Page Properties section now displays information about the node.

3. Under **Render Metadata in HTML Head**, do the following:

   ![Render Meta Data]

   a. To identify the node as the top of the hierarchy, set **First** to “Yes.”

   b. To display a pagination control, set **Next/Previous** to “Yes.”

   c. To organize the pages in the hierarchy as a book, set **Enable Chapter/Section** to “Yes.”

   d. To assign the node to a specific part of the book, set **Chapter/Section** to one of the following:
- Chapter
- Section
- Both

If you don’t want to include the node as part of the book, choose “None.”

**Step 4: Add Pagination Controls**

1. Under **Pagination Options for Nested Pages**, set **Enable Pagination** to “Yes.”

   ![Pagination Options](image)

   **Pagination Options**

2. In the **Frame** field, enter the number of page links that you want to include in the pagination control.

3. If there are more pages in the hierarchy that can be included in the pagination control, do the following:

   In the **Frame Skip** field, enter the number of pages that you want to skip ahead (or back) for the next set of pagination links.
Step 5: Choose the Menu Layout

1. If you want the mode to appear in the menu, do the following:

   ![Page Navigation Menu Options]

   b. To specify the location of the menu in relation to the content, set Menu Layout to one of the following:
      - Use Default
      - Content
      - Left Column
      - Right Column

   c. To specify how much detail is included in the menu, set Menu Detailization to one of the following:
      - Only Children Includes only subpages in the menu.
      - Neighbours and Children Includes subpages and other pages that are at the same level in the hierarchy.
d. To determine the depth of the menu, set **Maximal Depth** to the maximum number of levels to include.

e. To format the menu, choose the **List Type** and corresponding **List Style**.

   - **Unordered**: The menu options are not numbered, and can be formatted with or without bullets.
   - **Ordered**: The menu options are numbered, and can be formatted as numeric, alphabetic, or roman numerals in either upper- or lowercase.

2. Under **Main Navigation Menu Options**, do the following:

   If you want the node to be visible in the navigation menu, set **Show in Navigation menu** to "Yes".

   ![Main Navigation Menu Options](image)

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

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NODE PROPERTIES</strong></td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>The name of the node.</td>
</tr>
<tr>
<td>URL Key</td>
<td>A unique web address for the node.</td>
</tr>
<tr>
<td><strong>RENDER METADATA IN HTML HEAD</strong></td>
<td></td>
</tr>
<tr>
<td>This settings in this section apply only to top-level nodes and pages, and define the structure of the hierarchy.</td>
<td></td>
</tr>
<tr>
<td>First</td>
<td>Identifies the first page in the hierarchy. Options: Yes / No</td>
</tr>
<tr>
<td>Next/Previous</td>
<td>Adds Next and Previous page links so readers can browse in sequence. Options: Yes / No</td>
</tr>
<tr>
<td>Enable Chapter/Section</td>
<td>Determines if the content can be organized as a book, with chapters and sections. Options: Yes / No</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter/Section</td>
<td>Options:&lt;br&gt; No: Does not assign a book part to the current node.&lt;br&gt; Chapter: Assigns the current node as a chapter.&lt;br&gt; Section: Assigns the current node as a section.&lt;br&gt; Both: Assigns the current node as both a chapter and section.</td>
</tr>
</tbody>
</table>

PAGINATION OPTIONS FOR NESTED PAGES

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Pagination</td>
<td>Determines if a pagination control appears at the bottom of each page. Options: Yes / No</td>
</tr>
<tr>
<td>Frame</td>
<td>Determines the number of pagination links that appear in the pagination control.</td>
</tr>
<tr>
<td>Frame Skip</td>
<td>Specifies the number of pages to skip ahead if there are additional pages beyond what is visible in the pagination control.</td>
</tr>
</tbody>
</table>

PAGE NAVIGATION MENU OPTIONS

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show in Navigation Menu</td>
<td>Determines if a navigational menu is generated for the page hierarchy. Options: Yes / No</td>
</tr>
<tr>
<td>Menu Layout</td>
<td>Determines the default layout of navigation menu. Options:&lt;br&gt; Use Default: Uses the menu style that is specified in the configuration.&lt;br&gt; Left Column: The menu appears to the left of the content.&lt;br&gt; Right Column: The menu appears to the right of the content.</td>
</tr>
<tr>
<td>Menu Detalization</td>
<td>Determines the level of detail that is to be included in the menu. Options:&lt;br&gt; Only Children: Includes only subpages (children) in the menu.&lt;br&gt; Neighbors and Children: Includes both subpages and other pages at the same level in the hierarchy (neighbors) in the menu.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximal Depth</td>
<td>Determines the number of levels in the menu.</td>
</tr>
<tr>
<td>List Type</td>
<td>Determines the style that is applied to the menu. Options:</td>
</tr>
<tr>
<td>Unordered</td>
<td>Creates a list of menu options that can be styled with or without bullets. List Style Options:</td>
</tr>
<tr>
<td></td>
<td>Default</td>
</tr>
<tr>
<td></td>
<td>Circle</td>
</tr>
<tr>
<td></td>
<td>Disc</td>
</tr>
<tr>
<td></td>
<td>Square</td>
</tr>
<tr>
<td>Ordered</td>
<td>Creates a list of numbered menu options that can be numbered. List Style Options:</td>
</tr>
<tr>
<td></td>
<td>Default</td>
</tr>
<tr>
<td></td>
<td>Numbers (1, 2, 3,...)</td>
</tr>
<tr>
<td></td>
<td>Lower Alpha (a, b, c, ...)</td>
</tr>
<tr>
<td></td>
<td>Upper Alpha (A, B, C, ...)</td>
</tr>
<tr>
<td></td>
<td>Lower Roman (i, ii, iii, ...)</td>
</tr>
<tr>
<td></td>
<td>Upper Roman (I, II, III, ...)</td>
</tr>
</tbody>
</table>

Main Navigation Menu Options

| Show in navigation menu | Determines if the selected node is visible in the navigation menu. Options: Yes / No |
CHAPTER 49: 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.
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:

   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 plugins 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](image)

**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.
Step 2: Create a Content Block

1. Return to your store. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.

2. In the upper-right corner, click tap **Add New Block**. Then, do the following:
   a. Enter a descriptive **Block Title** for internal reference. For example: Facebook Like Button.
   b. Assign a unique **Identifier** to the block, using all lowercase characters, and underscores instead of spaces. For example: facebook_like_button.
   c. If your Magento installation has multiple store views, choose each **Store View** where the block is to be available.
   d. Paste the snippet of code that you copied from the Facebook site into the **Content** box.
   e. If the block is not ready to “go live,” set **Enable Block** to “No.”

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

Step 3: Place the Block

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**.

3. 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.

Slider Extensions

To add a lightbox or slider to your store, download the extension from Magento Marketplace, and follow the instructions to install the extension. For additional help, see the documentation provided by 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

<table>
<thead>
<tr>
<th>BLOCK REFERENCE</th>
<th>POSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breadcrumbs</td>
<td>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.</td>
</tr>
<tr>
<td>Left Column</td>
<td>Content is added to the left column.</td>
</tr>
<tr>
<td>Main Content Area</td>
<td>Content is added to the main content area.</td>
</tr>
<tr>
<td>My Cart Extra Actions</td>
<td>Content appears below the Cart Subtotal in the My Cart popup located within the top link.</td>
</tr>
<tr>
<td>Navigation Bar</td>
<td>Content appears below the main navigation bar.</td>
</tr>
<tr>
<td>Page Bottom</td>
<td>Content appears at the bottom of the page.</td>
</tr>
<tr>
<td>Page Footer</td>
<td>Content appears above the footer of the page.</td>
</tr>
<tr>
<td>Page Header</td>
<td>Content appears below the header of the page.</td>
</tr>
<tr>
<td>Page Top</td>
<td>Content appears at the top of the page.</td>
</tr>
<tr>
<td>Right Column</td>
<td>Content appears in the right column.</td>
</tr>
<tr>
<td>Store Language</td>
<td>Content appears in the upper-left corner of the header.</td>
</tr>
</tbody>
</table>
## Product Page

<table>
<thead>
<tr>
<th>BLOCK REFERENCE</th>
<th>POSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert URLs</td>
<td>Content appears below the title of the product on the product detail page.</td>
</tr>
<tr>
<td>Bottom Block Options Wrapper</td>
<td>If custom options are added, content appears below the Add to Cart button.</td>
</tr>
<tr>
<td>Breadcrumbs</td>
<td>Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that’s showcased below the navigation bar.</td>
</tr>
<tr>
<td>Info Column Options Wrapper</td>
<td>If a custom options are added, content appears to the right. The same location applies to configurable options.</td>
</tr>
<tr>
<td>Left Column</td>
<td>Content appears below the left column blocks.</td>
</tr>
<tr>
<td>Main Content Area</td>
<td>Content appears below the main content area.</td>
</tr>
<tr>
<td>My Cart Extra Actions</td>
<td>Content appears below the Cart Subtotal in the My Cart popup located within the top link.</td>
</tr>
<tr>
<td>Navigation Bar</td>
<td>Content appears below the main navigation bar.</td>
</tr>
<tr>
<td>Page Bottom</td>
<td>Content appears at the bottom of the page.</td>
</tr>
<tr>
<td>Page Footer</td>
<td>Content appears above the footer of the page.</td>
</tr>
<tr>
<td>Page Header</td>
<td>Content appears below the header of the page.</td>
</tr>
<tr>
<td>Page Top</td>
<td>Content appears at the top of the page.</td>
</tr>
<tr>
<td>PayPal Express Checkout (Payflow Edition) Shortcut Wrapper</td>
<td>If the PayPal payment method is enabled, content appears below the PayPal buy button.</td>
</tr>
<tr>
<td>PayPal Express Checkout Shortcut Wrapper</td>
<td>If the PayPal payment method is enabled, content appears below the PayPal buy button.</td>
</tr>
<tr>
<td>Product Tags List</td>
<td>Content appears below the products tag bar.</td>
</tr>
<tr>
<td>Product View Extra Hint</td>
<td>Content appears below the main top price of the product.</td>
</tr>
<tr>
<td>Right Column</td>
<td>Content appears below the right column blocks.</td>
</tr>
<tr>
<td>Store Language</td>
<td>Content appears to the right of the language chooser.</td>
</tr>
<tr>
<td>Tags List Before</td>
<td>Content appears above the Add Your Tags field.</td>
</tr>
</tbody>
</table>
Using a Widget

The CMS Static Block widget gives you the ability to place an existing content block most anywhere in your store.

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.
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.
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."

![Layout Updates](image)

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\(^1\) is sometimes used to refer to a block that is defined as a layout update with XML code. The term sidebar\(^2\) 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 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.

```
<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**.

---

\(^1\)A term that is sometimes used to describe a block that is defined as a layout update using XML code.

\(^2\)The right or left column of a two-column page layout.
CHAPTER 50:

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]

**Free Shipping Banner in Header**

<table>
<thead>
<tr>
<th>Process Overview:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1: <strong>Complete the Banner Properties</strong></td>
</tr>
<tr>
<td>Step 2: <strong>Complete the Banner Content</strong></td>
</tr>
<tr>
<td>Step 3: <strong>Choose a Related Promotion</strong> (optional)</td>
</tr>
<tr>
<td>Step 4: <strong>Place the Banner</strong></td>
</tr>
</tbody>
</table>

**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](image)

**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](image)

**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.

3. When complete, tap Save Banner.
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

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Area</td>
<td>The width of the main content area varies, depending on the column layout of the page.</td>
</tr>
<tr>
<td>Footer</td>
<td>The bottom section of the page contains the footer links and copyright notice.</td>
</tr>
<tr>
<td>Header</td>
<td>The top section of the page contains your logo, account links, search box, and top navigation.</td>
</tr>
<tr>
<td>Left Column</td>
<td>The left column of a two- or three-column layout.</td>
</tr>
<tr>
<td>Right Column</td>
<td>The right column of a two- or three-column layout.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display On Categories</td>
<td>Determines the categories where the banner rotator appears.</td>
</tr>
<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>Displays the banner rotator for a specific product, or type of product. Options:</td>
</tr>
<tr>
<td></td>
<td>All Product Type</td>
</tr>
<tr>
<td></td>
<td>Simple Product</td>
</tr>
<tr>
<td></td>
<td>Grouped Product</td>
</tr>
<tr>
<td></td>
<td>Configurable Product</td>
</tr>
<tr>
<td></td>
<td>Bundle Product</td>
</tr>
<tr>
<td></td>
<td>Virtual Product</td>
</tr>
<tr>
<td></td>
<td>Gift Card</td>
</tr>
</tbody>
</table>

| Categories                | Displays the banner rotator for only the categories selected.               |

<table>
<thead>
<tr>
<th>Block Reference</th>
<th>Assigns the banner rotator to a specific location by reference. Options:</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Template</th>
<th>Options include:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner Block Template</td>
<td></td>
</tr>
<tr>
<td>Banner Inline Template</td>
<td></td>
</tr>
</tbody>
</table>
### Banner Frontend App Options

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banners to Display</td>
<td>Options:</td>
</tr>
<tr>
<td></td>
<td>Specified Banners</td>
</tr>
<tr>
<td></td>
<td>Shopping Cart Promotions Related</td>
</tr>
<tr>
<td></td>
<td>Catalog Promotions Related</td>
</tr>
<tr>
<td>Restrict by Banner Types</td>
<td>Limits the banner to a certain section. Options:</td>
</tr>
<tr>
<td></td>
<td>Content Area</td>
</tr>
<tr>
<td></td>
<td>Footer</td>
</tr>
<tr>
<td></td>
<td>Header</td>
</tr>
<tr>
<td></td>
<td>Left Column</td>
</tr>
<tr>
<td></td>
<td>Right Column</td>
</tr>
<tr>
<td>Rotation Mode</td>
<td>Select the rotation mode for the banners. Options:</td>
</tr>
<tr>
<td>Do not rotate</td>
<td>Display one banner after the other, in a stack where all are visible.</td>
</tr>
<tr>
<td>One at a time, Random</td>
<td>Displays the banners that you specify in a randomly generated order. Every time the page is refreshed, a different (and random) banner appears.</td>
</tr>
<tr>
<td>One at the time, Series</td>
<td>Displays the banners that you specify by the order of their position every time the page is refreshed.</td>
</tr>
<tr>
<td>One at the time, Shuffle</td>
<td>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).</td>
</tr>
<tr>
<td>Specify Banners</td>
<td>Select the banners to include from the list of available banners.</td>
</tr>
</tbody>
</table>
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.

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.

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 51:
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

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Banner Rotator</strong></td>
<td>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 price rules, and placed on a specific page and location, or configured to appear on all pages.</td>
</tr>
<tr>
<td><strong>CMS Hierarchy Node Link</strong></td>
<td>Displays a link to a specific node in the page hierarchy that can be incorporated into other content.</td>
</tr>
<tr>
<td><strong>CMS Page Link</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>CMS Static Block</strong></td>
<td>Displays a block of content at a specific location on a page.</td>
</tr>
<tr>
<td><strong>Catalog Category Link</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Catalog Events Carousel</strong></td>
<td>Displays a list of upcoming catalog events.</td>
</tr>
<tr>
<td><strong>Catalog New Products List</strong></td>
<td>Displays a block of products which have been designated as new, for the duration of time specified in the product record.</td>
</tr>
<tr>
<td><strong>Catalog Product Link</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Catalog Products List</strong></td>
<td>Displays a list of products from the catalog.</td>
</tr>
<tr>
<td><strong>Gift Registry Search</strong></td>
<td>Gives shoppers the ability to search for public gift registries by name or Registry ID.</td>
</tr>
<tr>
<td><strong>Order by SKU</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Orders and Returns</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Recently Compared Products</strong></td>
<td>Displays the block of recently compared products. You can specify the number of products included, and format them as a list or product grid.</td>
</tr>
</tbody>
</table>
## Widgets (cont.)

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recently Viewed Products</td>
<td>Displays the block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.</td>
</tr>
<tr>
<td>Wish List Search</td>
<td>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.</td>
</tr>
</tbody>
</table>
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.

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](image-url)
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.
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](image)

   *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**.
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.

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.
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**.

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 item appears with others in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

---

### Storefront Properties

**Type**
Catalog New Products List

**Design Package/Theme**
Magento Luma

**Widget Title**
New Products List

**Assign to Store Views**
- All Store Views
- Main Website
- Main Website Store
- Default Store View
- French
- German
- Spanish

**Sort Order**
Sort Order of widget instances in the same container

---

### 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
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.
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.
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.

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:

   a. Set Display On to the type of page where the widget is to appear.

   b. 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
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.
CHAPTER 52:

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.

To display the Design menu:

On the Admin sidebar, tap Content. The Design options are part of the Content 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.
Design Configuration

The Design Configuration makes it easy to edit design-related rules and configuration settings by displaying the settings on a single page.

**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 Rule** section under **User Agent 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.
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. Then, follow the instructions in the linked topics to edit the settings as needed.

- Pagination
- HTML Head
- Header
- Footer
- Search Engine Robots
- Product Image Watermarks
- Transactional Emails

6. When complete, tap **Save Configuration**.
CHAPTER 53:
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 following Field Descriptions for more information about each item.)
5. When complete, tap Save Config.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favicon Icon</td>
<td>Store View</td>
<td>Uploads the small graphic image that appears in the address bar and tab of the browser. Allowed file types: ICO, PNG, APNG, GIF, and JPG (JPEG). Not all browsers support these formats.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Page Title</td>
<td>Store View</td>
<td>The title that appears at the title bar of each page when viewed in a browser. The default title is used for all pages, unless another title is specified for individual pages.</td>
</tr>
<tr>
<td>Page Title Prefix</td>
<td>Store View</td>
<td>A prefix can be added before the title to create a two- or three-part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.</td>
</tr>
<tr>
<td>Page Title Suffix</td>
<td>Store View</td>
<td>A suffix can be added after the title to create a two- or three-part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.</td>
</tr>
<tr>
<td>Default Meta Description</td>
<td>Store View</td>
<td>The description provides a summary of your site for search engine listings and should not be more than 160 characters in length.</td>
</tr>
<tr>
<td>Default Meta Keywords</td>
<td>Store View</td>
<td>A series of keywords that describe your store, each separated by a comma.</td>
</tr>
<tr>
<td>Scripts and Style Sheets</td>
<td>Store View</td>
<td>Contains scripts that must be included in the HTML before the closing <code>&lt;head&gt;</code> tag. For example, any third-party JavaScript that must be placed before the <code>&lt;body&gt;</code> tag can be entered here.</td>
</tr>
<tr>
<td>Display Demo Store Notice</td>
<td>Store View</td>
<td>Controls the display of the demo store notice at the top of the page. Options include: Yes / No</td>
</tr>
</tbody>
</table>
Header

The Header section identifies the path to your store logo, and specifies the logo alt text and welcome message.

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**.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logo Image</td>
<td>Store View</td>
<td>Identifies the path to the logo that appears in the header. Supported file types: PNG, GIF, JPG (JPEG)</td>
</tr>
<tr>
<td>Logo Attribute Width</td>
<td>Store View</td>
<td>The width of your logo image in pixels.</td>
</tr>
<tr>
<td>Logo Attribute Height</td>
<td>Store View</td>
<td>The height of your logo image in pixels.</td>
</tr>
<tr>
<td>Welcome Text</td>
<td>Store View</td>
<td>The welcome message appears in the header of the page and includes the name of customers who are logged in.</td>
</tr>
<tr>
<td>Logo Image Alt</td>
<td>Store View</td>
<td>The Alt text that is associated with the logo.</td>
</tr>
</tbody>
</table>
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.

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.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Copyright         | Store View  | The copyright statement that appears at the bottom of each page. To include the copyright symbol, use the HTML character entity `&copy;` as follows:
|                   |             | `&copy; 2014 Magento Demo Store. All Rights Reserved.` Make sure to replace the sample copyright notice with your own.               |
| Miscellaneous HTML| Store View  | An input box where you can upload miscellaneous scripts to the server that must be placed just before the closing <body> tag.             |
CHAPTER 54:
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.
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 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.
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.
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\(^1\) refers to the visual and structural composition of the page. However, the term layout update\(^2\) refers to a specific set of XML instructions that determines how the page is constructed.

The XML layout of your Magento for B2B 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 the 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.

---

\(^1\)The visual and structural composition of a page.

\(^2\)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.
## Block Descriptions

<table>
<thead>
<tr>
<th>BLOCK TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>page/html</td>
<td>There can be only one block of this type per page. The block name is &quot;root,&quot; and, it is one of the few root blocks in the layout. You can also create your own block and name it &quot;root,&quot; which is the standard name for blocks of this type.</td>
</tr>
<tr>
<td>page/html_head</td>
<td>There can be only one block of this type per page. The block name is &quot;head,&quot; and it is a child of the root block. This block must not be removed from layout.</td>
</tr>
<tr>
<td>page/html_notices</td>
<td>There can be only one block of this type per page. The block name is &quot;global_notices,&quot; 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.</td>
</tr>
<tr>
<td>page/html_header</td>
<td>There can be only one block of that type per page. The block name is &quot;header,&quot; 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.</td>
</tr>
<tr>
<td>page/html_wrapper</td>
<td>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.</td>
</tr>
<tr>
<td>page/html_breadcrumbs</td>
<td>There can be only one block of this type per page. The name of this block is &quot;breadcrumbs,&quot; and it is a child of the header block. This block displays breadcrumbs for the current page.</td>
</tr>
<tr>
<td>page/html_footer</td>
<td>There can be only one block of this type per page. The block name is &quot;footer,&quot; 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.</td>
</tr>
<tr>
<td>page/template_links</td>
<td>There are two blocks of this type in the standard layout. The &quot;top_links&quot; block is a child of the header block, and corresponds to the top navigation menu. The &quot;footer_links&quot; 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.</td>
</tr>
<tr>
<td>page/switch</td>
<td>There are two blocks of this type in a standard layout. The &quot;store_language&quot; block is a child of the header block, and corresponds to the top language switcher. The &quot;store_switcher&quot; block is a child of the footer block, and corresponds to the bottom store switcher.</td>
</tr>
<tr>
<td>core/messages</td>
<td>There are two blocks of this type in a standard layout. The &quot;global_messages&quot; block displays global messages. The &quot;messages&quot; block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.</td>
</tr>
<tr>
<td>BLOCK TYPE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>core/text_list</td>
<td>This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.</td>
</tr>
<tr>
<td>core/profiler</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

```xml
?  <!-- 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

```xml
?  someActionName($arg1, $arg2, ..., $argN)
```
### page/template_links

**Syntax**

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>addLink($label, $url, $title, $prepare)</td>
<td>Adds another link to the end of the list of existing links. Just specify the $label (link caption), $url (link URL) and $title (link tooltip), and you'll see a new link in the corresponding place. The $prepare parameter must be &quot;true&quot; if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the new page becomes BASE_URL/newpage if prepared.</td>
</tr>
<tr>
<td>removeLinkByUrl($url)</td>
<td>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.</td>
</tr>
</tbody>
</table>

### cms/block

**Syntax**

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>setBlockId($blockId)</td>
<td>Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.</td>
</tr>
</tbody>
</table>

```xml
<?xml version="1.0" encoding="utf-8"?>
<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**

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>addText($textContent)</td>
<td>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: ![CDATA[...]]</td>
</tr>
</tbody>
</table>

```xml
<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:

- `<block>` Create new block.
- `<reference>` Update existing content.
- `<action>` Assign actions to blocks.
- `<remove>` 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

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>type</td>
<td>* block class path</td>
</tr>
<tr>
<td></td>
<td>An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.</td>
</tr>
<tr>
<td>name</td>
<td>* block name identifier</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>before</td>
<td>block name</td>
</tr>
<tr>
<td></td>
<td>Is used to position the block before a block with the name specified in the value. If &quot;-&quot; value used the block is positioned before all other sibling blocks.</td>
</tr>
<tr>
<td>after</td>
<td>block name</td>
</tr>
<tr>
<td></td>
<td>Is used to position the block after a block with the name specified in the value. If &quot;-&quot; value used the block is positioned after all other sibling blocks.</td>
</tr>
<tr>
<td>template</td>
<td>template filename</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>as</td>
<td>block alias</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
<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

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>* block name</td>
</tr>
<tr>
<td></td>
<td>A name of a block to reference.</td>
</tr>
</tbody>
</table>

<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

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>method</td>
<td>* block method name</td>
</tr>
<tr>
<td></td>
<td>A name of the public method of the block class this instruction is located in that is called during the block generation.</td>
</tr>
</tbody>
</table>

<remove>
Removes an existing block from the layout.

Syntax

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>* block name</td>
</tr>
<tr>
<td></td>
<td>The name of the block to be removed.</td>
</tr>
</tbody>
</table>

<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

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>name</td>
<td>* block name</td>
</tr>
<tr>
<td></td>
<td>The name of any block to be extended.</td>
</tr>
<tr>
<td></td>
<td>* any other</td>
</tr>
<tr>
<td></td>
<td>Any other attribute specific for the &lt;block&gt; instruction.</td>
</tr>
<tr>
<td>parent</td>
<td>block name</td>
</tr>
<tr>
<td></td>
<td>The name of the block that should become a new parent for the referenced block.</td>
</tr>
<tr>
<td></td>
<td>* Indicates a required value</td>
</tr>
</tbody>
</table>
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

```xml
<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\(^1\) 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\(^2\) 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.

---

\(^1\)The order in which scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

\(^2\)In programming, a name used to reference an object.
CHAPTER 55:

Themes

A theme is a collection of files that determines the visual presentation of your store. When you first install Magento for B2B 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.

A responsive theme adjusts the page layout to fit the view port of the device. Magento’s sample “Luma” theme has a flexible, responsive layout that can be viewed from the desktop, tablet, or mobile device.

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.
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.

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.
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.

To add a user agent rule:

1. Under Design Rule, tap Add New User Agent Rule. Then, do the following:

   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.

To install a new theme:

1. Follow the steps outlined in the Marketplace Buyers Guide:
   - Find a Theme
   - Evaluate the Product
   - Make a Purchase
   - Download the Software
   - Install the Theme extension

2. To apply the theme to your store, see: Using the Default Theme.
Theme Assets

The term static files\(^1\) 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.

\[
\text{[magento_root]/app/design/frontend/Magento/[theme_name]/web}
\]

\(^1\)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](image)

   **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.

CSS files can be merged only when working in Developer Mode.

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.
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.

JavaScript files can be merged only when working in Developer Mode.

**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.

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:

   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 56: 

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.

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.

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.

When any of the following content assets are created, an corresponding campaign is set up as a placeholder, and the Scheduled Changes box appears across the top of the page. The placeholder campaign has a start date, but not an end date. You can schedule updates to the content as part of a campaign, 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
- Widgets

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.
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.

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.

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.

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.
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.

---

**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](image)

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](image)
3. To preview a different day or time, tap the **Date & Time** calendar icon. 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.

6. Expand the **Products** section to see your scheduled update.
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.
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.

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.”
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

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 and enter the end date that is needed.

Follow the steps below to edit any of the objects in this 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.
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:
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](image)

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

5. On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.

6. Find the campaign in the list. Click once to view the detail, and tap **View/Edit**.
Any day or period of time during a campaign can be previewed and shared with others.

To preview a campaign:

1. 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.
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
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.
CHAPTER 57: 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.

To display the Customers menu:

On the Admin sidebar, tap Customers.
Menu Options

All Customers
Lists all customers who have registered for an account with your store, or were added by the administrator.

Now Online
Lists all customers and visitors who are currently online in your store.

Customer Groups
The customer group determines which discounts are available to shoppers, and the tax class applies to the purchase.

Segments
Dynamically display content and promotions to specific customers, based on properties such as customer address, order history, shopping cart contents, and more.

Companies
Lists all active company accounts and pending requests, regardless of status setting, and provides the tools needed to create and manage company
All Customers

The Customers grid lists all customers who have registered for an account with your store, or were added by the administrator. Use the standard grid controls to filter the list, and adjust the column layout. To learn more, see: Managing Customer Accounts.

To view customer information:

1. On the Admin sidebar, tap Customers. Then, choose All Customers.
2. Find the customer record. Then in the Action column, click Edit.
3. In the panel on the left, choose the information you need to edit. Then, make the necessary changes. To learn more, see: Updating Customer Accounts.
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 interval of time that customers are shown as currently online is set in the configuration, and determines how long the customer's activity is visible from the Admin. By default, the interval is fifteen minutes.

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**.

To configure the time interval:

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 **Online Customers Options** section. Then, do the following:
a. In the **Online Minutes Interval** field, enter the number of minutes for the customer session to be visible from the Admin. Leave the field empty to accept the default interval of fifteen minutes.

b. In the **Customer Data Lifetime** field, enter the number of minutes before any unsaved data entered by the customer expires.

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

### Column Descriptions

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>The customer ID of a registered customer.</td>
</tr>
<tr>
<td>First Name</td>
<td>The first name of a registered customer.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The last name of a registered customer.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of a registered customer.</td>
</tr>
<tr>
<td>IP Address</td>
<td>The IP address of the computer that customers and guests are using to access your store.</td>
</tr>
<tr>
<td>Session Start Time</td>
<td>The date and time that marks the beginning of the current customer session.</td>
</tr>
<tr>
<td>Last Activity</td>
<td>The date and time of the customer’s last activity in your store.</td>
</tr>
<tr>
<td>Type</td>
<td>Options include: Customer / Visitor</td>
</tr>
<tr>
<td>Last URL</td>
<td>The last URL the customer visited.</td>
</tr>
</tbody>
</table>
CHAPTER 58:
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 enjoy a range of benefits, including:

☑️ Create Individual or Company Account. Depending on the configuration, a visitor to your store can choose to create either an individual or company account.

☑️ 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.

For B2B installations of Magento Commerce, there are two basic types of accounts that can be created: Individual and company accounts.

Individual
An individual customer account is similar to a standard Magento customer account.

Company
A company account can be set up as a structure with teams and multiple users.

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

Account Types

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual User</td>
<td>An individual customer account is similar to a standard Magento customer account.</td>
</tr>
<tr>
<td>Company</td>
<td>A <strong>company</strong> account can be set up as a structure of divisions, subdivisions with multiple users. Companies can be enabled or disabled for each store. Some B2B features, such as Shared Catalog and Quotes are available only for Company accounts.</td>
</tr>
<tr>
<td>Company Admin</td>
<td>The Company Admin is responsible to build the company structure that is needed for the customer account, and define the roles and permissions for Admin users. The Company Admin is set up when creating a company account, but is represented as an individual account in the system.</td>
</tr>
<tr>
<td>Company User</td>
<td>Company users are authorized to make purchases on behalf of the company, and team, division, or subdivision to which they are associated. Company user accounts are set up by the Company Admin, and are represented as individual accounts in the system.</td>
</tr>
</tbody>
</table>
Configuring Account Options

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:

- Account Scope
- Login Landing Page
- New Account Options
- Name and Address Options
- Password Options
- Customer Session Lifetime
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.

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
Default Group
Default Value for Disable Automatic Group Changes Based on VAT ID
Show VAT Number on Storefront

Default Email Domain
Default Welcome Email

Default Welcome Email Without Password

Email Sender
Require Emails Confirmation

Confirmation Link Email

Welcome Email

Generate Human-Friendly Customer ID
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 which attributes are included in the names and addresses that appear in the customer account.

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](image-url)
4. 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.

5. 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.

6. To include additional fields, do the following:
   a. Set **Show Telephone** to “Yes.”
   b. Set **Show Company** to “Yes.”
   c. Set **Show Fax** to “Yes.”

7. 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.

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.
Customer Session Lifetime

The lifetime of a customer shopping session is determined by several factors, including the length of the server session, the use of a persistent cart, and the lifetime of information that is stored in the browser. Although these are related to the same customer experience, they are actually separate processes with different expiration events and lifetimes.

**Session** Information that is stored on the server, such as the contents of the shopping cart. If the server session expires before the cookie expires, customers might lose the cart contents and reduce security risk.

**Session Cookie** Information that is stored in the browser as a number or string of characters. If the session cookie expires before the server session, the customer is logged out. The session cookie is deleted when the customer closes the browser window. By default, the cookie lifetime is set to 3600 seconds, or one hour. 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 cart contents are saved for the next time customers sign into their accounts. When using a persistent cart, it is recommended that you set the lifetime of the server session and the session cookie to a long period of time.

On the server, the length of the session is controlled by php.ini, and several variables. At this time, Magento does not have an Admin configuration setting that controls the length of the server session.
To configure the cookie lifetime:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. If you have multiple stores, set the **Store View** chooser in the upper-right corner to the store where the configuration applies.

3. In the panel on the left under **General**, choose **Web**.

4. Expand the **Default Cookie Settings** section.

5. To change the default, clear the **Use system value** checkbox. Then, enter the new value in seconds.

6. Tap **Save Config**.
Creating an Individual Account

Visitors to your store can open an account to manage their purchases and activities. Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which is useful for helping customers over the phone.

The following instructions represent the default customer account configuration. To change the selection and behavior of some of the fields in the form, see: Configuring Account Options.

Method 1: Create Account from Storefront

1. From the storefront, click the Create an Account link in the upper-right corner of the header. Then, choose Create New Customer.

2. Under Personal Information, enter your First Name and Last Name.

3. If you want to add your name and email address to the list of newsletter subscribers, mark the Sign Up for Newsletter checkbox.

   This option appears even if the store doesn’t publish a newsletter.

4. Under Sign-in Information, enter your Email address.

   This email address will become part of your sign-in credentials, and cannot be associated with any other customer account.
5. Enter a **Password** that includes three of the following types of information:

   - Lowercase characters
   - Uppercase characters
   - Numbers
   - Special Characters

   After you press **Enter**, the strength of the password is evaluated, and appears below the field. If the password is considered to be “Weak,” try another until it evaluated as “Strong”.

   Then, enter it again to **Confirm Password**.

6. When complete, tap **Create an Account**.

   You can now use your email address and password to **sign in** to your account to complete the address information.

**Method 2: Create Account from Admin**

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.

2. Tap **Add New Customer**.
Step 1: **Complete the Account Information**

1. In the **Account Information** section, do the following:
   a. For a multisite installation, set **Associate to Website** to the website where the customer account applies.
   b. If applicable, assign the customer to a different **Customer Group**.
   c. If using VAT ID Validation, and want to **Disable Automatic Group Change Based on VAT ID**, mark the checkbox.

2. Complete the required fields:
   - First Name
   - Last Name
   - Email

3. Complete the optional fields as needed:
   - Name Prefix
   - Middle Name/Initial
   - Name Suffix
- Date of Birth
- Tax/VAT Number
- Gender

4. Set **Send Welcome Email From** to the store view from which the Welcome email is to be sent.

   If the store has views for different languages, this setting determines the language of the Welcome email.

5. If **Vertex Cloud** is enabled, enter the **Vertex Customer Code** that you want to use for this customer.

6. Tap **Save and Continue Edit**.

After 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 the account.

![Customer View](image)

**Customer View**

**Step 2: Complete the Address Information**

1. In the panel on the left, choose **Addresses**. Then, tap **Add New Addresses**.

   The Addresses page has two columns. The first has checkboxes to identify the type of address, and the second contains the fields that are associated with the address.

2. If the same address is used for both billing and shipping, toggle both options.
   - Default Billing Address
   - Default Shipping Address

3. Scroll down and complete the required address fields in the second column.
• Street Address
• City
• Country
• State/Province
• ZIP/Postal Code

4. Enter the **Phone Number** for this address.

5. Enter the **VAT Number** that applies to this address, if applicable. To learn more, see: [Value Added Tax (VAT)](#).

6. If this is the only address that is needed for the account, tap **Save**. Otherwise, tap **Save and Continue Edit**.

7. To add another address, tap **Add New Address**. Repeat the process.

8. All addresses display in a table, with the default billing and shipping addresses detailed. The **Action** menu allows you to edit or remove an address.
When complete, tap **Save Customer**.

The new customer account now appears in the Customers grid.

---

**Step 3: Reset the Password**

Customer accounts created from the Admin do not initially have passwords assigned.

1. Find the new customer account in the grid.
2. In the **Action** column, click **Edit**.
3. In the set of options across the top of the page, click **Reset Password**.
   
   Notification is sent to the account owner, with instructions for setting the password.
Button Bar

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional buttons</td>
<td>Additional buttons become available when the profile is saved for the first</td>
</tr>
<tr>
<td>Become Available</td>
<td>time. To learn more, see: Updating a Customer Profile.</td>
</tr>
<tr>
<td>Back</td>
<td>Returns to the Customers page without saving changes.</td>
</tr>
<tr>
<td>Reset</td>
<td>Resets any unsaved changes in the customer form to their previous values.</td>
</tr>
<tr>
<td>Save and Continue</td>
<td>Saves changes, and keeps the customer profile open.</td>
</tr>
<tr>
<td>Save Customer</td>
<td>Saves changes, and closes the customer profile.</td>
</tr>
</tbody>
</table>

To learn more about updating a customer profile, refer to the referenced section.
Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACCOUNT INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Associate to Website</td>
<td>Identifies the website associated with the customer account.</td>
</tr>
<tr>
<td>Group</td>
<td>Identifies the customer group to which the customer belongs. If applicable, mark the checkbox to disable automatic group change based on VAT.</td>
</tr>
<tr>
<td>Name Prefix</td>
<td>If used, the prefix that is associated with the customer’s name. For example: Mr., Ms, or Dr. The prefix values are determined by the configuration. Depending on the configuration, the input control might be a text field or a drop-down list of options.</td>
</tr>
<tr>
<td>First Name</td>
<td>The customer’s first name.</td>
</tr>
<tr>
<td>Middle Name / Initial</td>
<td>The middle name or initial of the customer. This field is included only if specified in the configuration.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The customer’s last name.</td>
</tr>
<tr>
<td>Name Suffix</td>
<td>If used, the suffix that is associated with the customer’s name. For example: Jr., Sr., or III. The suffix values are determined by the configuration. Depending on the configuration, the input control might be a text field or a drop-down list of options.</td>
</tr>
<tr>
<td>Email</td>
<td>The customer’s email address.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>The customer’s date of birth. The date of birth is included if specified in the configuration.</td>
</tr>
<tr>
<td>Tax / VAT Number</td>
<td>The customer’s Tax or Value Added Tax number, if applicable.</td>
</tr>
<tr>
<td>Gender</td>
<td>Identifies the customer’s gender. The gender is included if specified in the configuration. Options: Male, Female, Not Specified</td>
</tr>
<tr>
<td>Send Welcome Email From</td>
<td>If you have multiple store views, identifies the store view from which the Welcome message is sent. If store views are used for different languages, this determines the language of the Welcome email.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vertex Customer Code</td>
<td>(Requires Vertex Cloud) A unique code that is referenced for customer exceptions. The code can be an abbreviation of the customer name, number, or alphanumeric string.</td>
</tr>
</tbody>
</table>

### ADDRESSES

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Addressees</td>
<td>Identifies the type of new address. Options: Default Billing Address, Default Shipping Address</td>
</tr>
<tr>
<td>Company</td>
<td>The company name, if applicable for this address.</td>
</tr>
<tr>
<td>Street Address</td>
<td>The street address of the customer. A second line of the street address is available if specified in the configuration.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the customer address is located.</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the customer address is located.</td>
</tr>
<tr>
<td>State/Province</td>
<td>The state or province where the customer address is located.</td>
</tr>
<tr>
<td>Zip/Postal Code</td>
<td>The ZIP or postal code where the customer address is located.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The customer’s phone number that is associated with address.</td>
</tr>
<tr>
<td>VAT Number</td>
<td>If applicable, the value added tax number that applies to the customer at this address.</td>
</tr>
</tbody>
</table>
Managing Customer Accounts

The Customers grid lists all current customer accounts. Use the standard workplace controls to filter the list, change the column layout, save views, and export data. The Actions control above the grid can be used to apply an operation to multiple customer records.

To apply an action:

The following actions can be applied to either single or multiple records.

1. On the Admin sidebar, tap Customers. Then, choose All Customers.
2. In the first column of the grid, mark the checkbox of each record that you want to update. Then, follow the instructions for the action that you want to apply:

Delete Customer Accounts

Deleted customer accounts cannot be restored. Information about customer activity and transactions is retained in the system.

1. Set the Actions control to “Delete”.
2. When prompted to confirm, tap OK.

Set Active/Inactive

Customers with inactive accounts cannot log in or make purchases from their accounts.

1. Set the Actions control to one of the following:
   - Active
   - Inactive
2. When prompted to confirm, tap OK.
Subscribe to Newsletter

1. Set the Actions control to “Subscribe to newsletter”.
2. When prompted to confirm, tap OK.

Unsubscribe from Newsletter

1. Set the Actions control to “Unsubscribe to newsletter”.
2. When prompted to confirm, tap OK.

Assign a Customer Group

1. Set the Actions control to “Assign a customer group”.
2. Choose the customer group to which all selected customer records are to be assigned.
3. When prompted to confirm, tap OK.

Edit a Customer Account

Method 1: Quick Edit

1. In the first column, mark the checkbox of the customer account to be edited.
2. Set the Actions column to “Edit.”

   The value of each value that can be updated appears in a text box. Only some values of the selected customer record can be edited from the grid.
3. Update any of the following values, as needed:
   - Email
   - Group
   - Phone
   - ZIP
   - Web Site
   - Tax/VAT Number
   - Gender
4. Tap Save.

**Method 2: Full Edit**

1. In the grid, find the customer record to be edited.
2. In the Actions column on far right, click Edit.
3. Make the necessary changes to the company information.
   
   To learn more, see: Updating a Customer Profile.

3. When complete, tap Save.
## Actions Control

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Deletes selected customer accounts. If the customer account belongs to a company admin, another company user must be assigned as admin before the customer account can be deleted.</td>
</tr>
<tr>
<td>Set Active</td>
<td>Removes a block on selected customer accounts, and changes the status to “Active”. The customers can log in and make purchases from their accounts.</td>
</tr>
<tr>
<td>Set Inactive</td>
<td>Blocks the selected customer accounts, and changes the status to “Inactive”. The blocked customers will not be able to log in or make purchases from their accounts. The customer account of a company admin cannot be set to “inactive”. Another user in the company must first be assigned as company admin.</td>
</tr>
<tr>
<td>Subscribe to Newsletter</td>
<td>Subscribes selected customers to newsletter.</td>
</tr>
<tr>
<td>Unsubscribe from Newsletter</td>
<td>Unsubscribes selected customers from newsletter.</td>
</tr>
<tr>
<td>Assign a Customer Group</td>
<td>Assigns selected customers to a customer group.</td>
</tr>
<tr>
<td>Edit</td>
<td>Allows some values of a single selected customer record to be edited from the grid. By default, the following values are available for a quick edit: Email, Group, Phone, ZIP, Web Site, Tax VAT Number, and Gender.</td>
</tr>
</tbody>
</table>

---

**CHAPTER 58: Customer Accounts**

Managing Customer Accounts

Magento for B2B Commerce User Guide 1289
Column Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Mark the checkbox to select customer records that are to be subjects of an action. Or, use the selection control in the column header to select/deselect all.</td>
</tr>
<tr>
<td>ID</td>
<td>A unique numeric identifier that is assigned when the customer account is created.</td>
</tr>
<tr>
<td>Name</td>
<td>The first and last name of the customer.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the customer.</td>
</tr>
<tr>
<td>Group</td>
<td>The customer group to which the customer is assigned.</td>
</tr>
<tr>
<td>Phone</td>
<td>The phone number of the customer.</td>
</tr>
<tr>
<td>ZIP</td>
<td>The ZIP or postal code of the customer.</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the customer is located.</td>
</tr>
<tr>
<td>State/Province</td>
<td>The state or province where the customer is located.</td>
</tr>
<tr>
<td>Customer Since</td>
<td>The date and time the customer account was created.</td>
</tr>
<tr>
<td>Web Site</td>
<td>The web site in the store hierarchy to which the customer account is associated.</td>
</tr>
<tr>
<td>Confirmed Email</td>
<td>Indicates if a confirmation email is required to be sent.</td>
</tr>
<tr>
<td>Account Created In</td>
<td>Indicates the store view from which the customer account was created.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>The date of birth of the customer.</td>
</tr>
<tr>
<td>Tax / VAT Number</td>
<td>If applicable, the tax number or value-added tax number that is assigned to the customer.</td>
</tr>
</tbody>
</table>

This field is not the same as the VAT Number

Gender | The gender of the customer.
Action | Edit | Opens the company account in edit mode.

ADDITIONAL COLUMNS

The following columns are available by changing the column layout of the grid.
## Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
<td>The company name of the customer.</td>
</tr>
<tr>
<td>Street Address</td>
<td>The street address of the customer.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the customer is located.</td>
</tr>
<tr>
<td>Fax</td>
<td>The fax number of the customer, if applicable.</td>
</tr>
<tr>
<td>Billing Firstname</td>
<td>The first name in the billing address of the customer.</td>
</tr>
<tr>
<td>Billing Lastname</td>
<td>The last name in the billing address of the customer.</td>
</tr>
<tr>
<td>Billing Address</td>
<td>The address where billing information is to be sent.</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>The address where orders are to be shipped.</td>
</tr>
<tr>
<td>VAT Number</td>
<td>The value-added tax number that is associated with the customer address. For digital goods sold in the EU, the VAT is based on the billing address of the customer. This field is not the same as the Tax/VAT Number.</td>
</tr>
<tr>
<td>Account Lock</td>
<td>Indicates the status of the account. As a security measure, customer accounts can be locked after too many login attempts. Values: Locked / Unlocked</td>
</tr>
</tbody>
</table>
Updating a Customer Profile

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.

To update a customer profile:

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 field values, using the field descriptions for reference.
4. When complete, tap Save Customer.
### Button Bar

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Returns to the Customers page without saving changes.</td>
</tr>
<tr>
<td>Delete Customer</td>
<td>Deletes the customer account.</td>
</tr>
<tr>
<td>Reset</td>
<td>Resets any unsaved changes in the customer form to their previous values.</td>
</tr>
<tr>
<td>Create Order</td>
<td>Creates a new order that is associated with the customer account.</td>
</tr>
<tr>
<td>Reset Password</td>
<td>Resets the password of the customer.</td>
</tr>
<tr>
<td>Force Sign-In</td>
<td>Clears the tokens associated with the customer’s password, and provides the administrator access to the account,</td>
</tr>
<tr>
<td>Manage Shopping Cart</td>
<td>Provides access to the shopping cart of a customer.</td>
</tr>
<tr>
<td>Save and Continue Edit</td>
<td>Saves changes, and keeps the customer account open.</td>
</tr>
<tr>
<td>Save Customer</td>
<td>Saves changes, and closes the customer account.</td>
</tr>
</tbody>
</table>
Customer Sign In

Customer 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.

If Amazon Pay is enabled for your store, customers who sign in with the credentials from their Amazon account can use the shipping addresses and payment methods that are available in their Amazon account during checkout. Login with Amazon requires customers to grant permission to share data from their Amazon accounts with your store.

Before company admins can sign in to their accounts, they must first set the password by clicking the link in the Welcome email. The system verifies that the company exists, and then checks the status of the company account. The sign-in process can proceed only if the company account is “active”.

If a CAPTCHA enabled in the configuration, the person must correctly complete a test that verifies them to be human, before gaining access to their accounts.

When customers forget their passwords, a reset link is sent to the email address that is associated with the account. The number of times a customer can try to enter a password, the number of minutes between attempts, the number of total attempts before the account is locked, and the length of the lockout is set in the Password Options configuration.
To set your password before first sign in:

1. Look for a Welcome email to arrive from the store. Then, follow the instructions and click the word “link” to set your password.

   Welcome Email

2. Enter a **New Password** for your account. Then, enter it again to confirm. The password must include at least three of the following character types:
   
   - Lowercase characters (abc...)
   - Uppercase characters (ABC...)
   - Numbers (1234567890)
   - Special characters (!@#$...)

3. Tap **Set a New Password**.
4. When the Customer Login page appears, enter your **Email** and **Password**. Then, tap **Sign In** to access your account dashboard.

![Account Dashboard](image1)

**Account Dashboard**

**To sign in to your customer account:**

1. In the header of the store, click **Sign in**.

![Customer Login](image2)

**Customer Login**

2. Enter your **Email** address and **Password**. Then, tap **Sign in**.

If you can’t remember your password, click **Forgot Your Password?** Then, follow the **instructions** to reset your password.
To sign in with Amazon:

1. In the header of the store, click **Sign in**.

2. Tap **Login with Amazon**.

3. When prompted to sign in, enter the **email address** and **password** for your Amazon buyer account.

4. To grant Amazon permission to share the following information from your account with the store when processing your purchases, tap **Okay**.
   - Your Name
   - Your Email Address
   - Shipping Addresses
Grant Permission to Share Data

Resetting Passwords

Customers usually reset their passwords from the storefront by clicking the “Forgot Your Password?” link.

However, the store administrator can initiate either a password reset or a forced sign in from the Admin.

Reset Password

A password reset email is sent directly to the customer’s email account. At no time does the store administrator gain access to the customer's password.

Force Sign In

Revokes the OAuth access tokens that are associated with the customer account. This can be used only with customer accounts that have been assigned OAuth tokens as part of a Web API integration. To learn more, see: OAuth-based authentication.

Standard customer accounts created from the storefront or from the Admin do not have OAuth tokens.

To reset a password from the storefront:

1. On the Login page, tap **Forgot Your Password**?
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Reset**.
Forgot Your Password

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. When the email arrives, click the reset password link, 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 sign in to your account.

To reset a password from the Admin:

1. On the Admin sidebar, tap Customers. Then, choose All Customers.

2. Find the customer account in the grid. Then in the Action column, click Edit.

3. In the set of options across the top of the page, tap Reset Password.

The number of password reset requests that are allowed within an hour is set in the configuration.

To revoke a customer’s OAuth tokens:

Do not proceed unless you are a developer familiar with API Authentication.

1. On the Admin sidebar, tap Customers. Then, choose All Customers.

2. Find the customer account in the grid. Then in the Action column, click Edit.

3. In the set of options across the top of the page, tap Force Sign In.

4. When prompted to confirm, tap OK.
Account Dashboard

The customer's account dashboard gives them the ability to reorder, track orders, manage shipping addresses and store activities. The full range of B2B options are available only for customers who are associated with a company. Otherwise, the dashboard options for individual accounts are the same as those available to Magento Commerce customers.

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Quotes</td>
<td>(Companies Only) Lists all quotes submitted by the customer, with a link to detailed information.</td>
</tr>
<tr>
<td>My Orders</td>
<td>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.</td>
</tr>
<tr>
<td>My Downloadable Products</td>
<td>Lists all downloadable products the customer has purchased, with a link to each.</td>
</tr>
<tr>
<td>My Requisition Lists</td>
<td>(Companies Only) Maintains all requisition lists created by the customer.</td>
</tr>
<tr>
<td>My Wish List</td>
<td>Manage your wish lists, and place orders from wish list items.</td>
</tr>
<tr>
<td>Address Book</td>
<td>The customer address book includes the default billing and shipping address, and additional address entries.</td>
</tr>
<tr>
<td>SECTION</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account Information</td>
<td>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.</td>
</tr>
<tr>
<td>Store Credit</td>
<td>Displays the current amount of store credit from returns, refunds, and redeemed gift card that can be applied to purchases.</td>
</tr>
<tr>
<td>Stored Payment Methods</td>
<td>Lists any payment methods with secure vaults that are used by the customer to store credit card information.</td>
</tr>
<tr>
<td>Gift Card</td>
<td>Allows customers to check the current balance on available gift cards, and to redeem gift cards for store credit.</td>
</tr>
<tr>
<td>Billing Agreements</td>
<td>Displays a list of any customer billing agreements.</td>
</tr>
<tr>
<td>Company Profile</td>
<td>(Companies Only) Manage your company information, including the company name and address, company admin contact information, and payment information.</td>
</tr>
<tr>
<td>Company Credit</td>
<td>(Companies Only) The Company Credit section shows the current outstanding balance, available credit, and the credit limit that is allocated to the account, followed by a list of outstanding invoices. The Company Credit section appears in the dashboard only when Payment on Account is enabled in the configuration.</td>
</tr>
<tr>
<td>Company Structure</td>
<td>(Companies Only) Used by the company admin to define the business structure of the company.</td>
</tr>
<tr>
<td>Company Users</td>
<td>(Companies Only) Used by the company admin to create user accounts for company buyers.</td>
</tr>
<tr>
<td>Roles and Permissions</td>
<td>(Companies Only) Used by the company admin to define roles for company users with various levels of permission.</td>
</tr>
<tr>
<td>Reward Points</td>
<td>Lists all reward points the customer has earned that can be applied toward purchases.</td>
</tr>
<tr>
<td>Gift Registry</td>
<td>Used to list and maintains gift registries, and add new ones.</td>
</tr>
<tr>
<td>My Product Reviews</td>
<td>Displays a list of all product reviews submitted by the customer, with a link to each.</td>
</tr>
<tr>
<td>Newsletter Subscriptions</td>
<td>Lists all available newsletters. Those to which the customer is currently subscribed have a checkmark.</td>
</tr>
<tr>
<td>My Invitations</td>
<td>Lists all invitations the customer has created and sent for scheduled events.</td>
</tr>
</tbody>
</table>
My Quotes

If quotes are enabled, the My Quotes section of the account dashboard lists all quotes submitted by the customer. Depending on their permissions, only buyers who make purchases on behalf of a company can submit requests to negotiate the price of a purchase.

My Quotes

The buyer begins the process by submitting a request for a quote from the shopping cart. Email is exchanged between the buyer and seller during the negotiation process. For the buyer, the My Quotes page is the focal point for all communication between buyer and seller during the negotiation process. A buyer who accepts the negotiated price offered by the seller can proceed directly to checkout from the quote. Additional discounts cannot be added to the negotiated quote.

To view a quote:
1. Log in to your account.
2. In the panel on the left, choose My Quotes.
3. Find the quote in the list. Then in the Action column, click View.

To print a quote:
1. In the open quote to the right of the Items Quoted section, click Print.
2. Verify the Destination as either a printer or PDF.
3. Tap Print.
To cancel a quote request:

1. In the open quote just above the Items Quoted section, click **Close quote**.

   The request is canceled, and the quote status changes to “Closed”. The closed quote remains in your list of quotes, and continues to be listed in the Quotes grid from the Admin.

2. To remove the canceled quote from your list of quotes, click **Delete**. Then when prompted to confirm, tap **OK**.

   The closed quote is removed from your list of quotes. However, it continues to be listed in the Admin Quotes grid, with the “Closed” status.

Column Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quote Name</td>
<td>The name assigned to the quote request by the buyer.</td>
</tr>
<tr>
<td>Created</td>
<td>The date the quote request was first submitted.</td>
</tr>
<tr>
<td>Created By</td>
<td>The first and last name of the buyer who submitted the quote request.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current status of the quote. The status of a quote can be</td>
</tr>
<tr>
<td></td>
<td>changed only by action on the part of either the buyer or seller.</td>
</tr>
<tr>
<td></td>
<td><strong>Submitted</strong></td>
</tr>
<tr>
<td></td>
<td>The buyer’s request for a quote hasn’t yet been opened by the seller.</td>
</tr>
<tr>
<td></td>
<td>While in this state, the buyer can still make changes to the request for a</td>
</tr>
<tr>
<td></td>
<td>quote. Available actions:</td>
</tr>
<tr>
<td></td>
<td>View / Close</td>
</tr>
<tr>
<td></td>
<td>Edit Quantity</td>
</tr>
<tr>
<td></td>
<td>Delete SKU</td>
</tr>
<tr>
<td></td>
<td>Add Comments</td>
</tr>
<tr>
<td></td>
<td>Edit Shipping Address</td>
</tr>
<tr>
<td></td>
<td><strong>Pending</strong></td>
</tr>
<tr>
<td></td>
<td>The seller has opened the request and is in the process of reviewing it</td>
</tr>
<tr>
<td></td>
<td>and preparing a response. Available actions: View / Close</td>
</tr>
<tr>
<td></td>
<td><strong>Updated</strong></td>
</tr>
<tr>
<td></td>
<td>The seller has sent a response to the buyer, and the Proceed to Checkout</td>
</tr>
<tr>
<td></td>
<td>button is enabled. While in this state, the buyer can continue to make</td>
</tr>
<tr>
<td></td>
<td>changes to the quote. Available actions: View</td>
</tr>
<tr>
<td></td>
<td>Send for Review</td>
</tr>
</tbody>
</table>
### Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceed to Checkout</td>
<td></td>
</tr>
<tr>
<td>Delete Quote</td>
<td></td>
</tr>
<tr>
<td>Close</td>
<td></td>
</tr>
<tr>
<td>Edit Quantity</td>
<td></td>
</tr>
<tr>
<td>Delete SKU</td>
<td></td>
</tr>
<tr>
<td>Add comments</td>
<td></td>
</tr>
<tr>
<td>Edit Shipping Address</td>
<td></td>
</tr>
</tbody>
</table>

**Open**
The buyer is making changes to the quote, and the Proceed to Checkout button is disabled. Available actions:
- View
- Send for Review
- Delete Quote
- Edit quantity
- Delete SKU
- Add Comments
- Edit Shipping Address

**Ordered**
The buyer has submitted an order based on the negotiated quote. The quote is locked, and cannot be edited. Available action: View

**Closed**
The buyer has ended the negotiation and cancels the quote. The quote is locked, and cannot be edited by either buyer or seller. Available action: View / Delete

**Declined**
The seller has declined the request for a quote, or to make a proposed change during the negotiation process. A quote can be declined at any stage of the workflow. Any custom pricing is removed from the quote. The buyer can continue editing the quote and resubmit, or make the purchase based on standard catalog prices. Available actions:
- View
- Send for Review
- Delete Quote
Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Edit Quantity</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete SKU</td>
</tr>
<tr>
<td>Add</td>
<td>Add Comments</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit Shipping Address</td>
</tr>
<tr>
<td>Expired</td>
<td>The lifetime of the quote has expired. Any proposed prices are reset. The buyer can open an expired quote to either complete the purchase based on current catalog prices, or initiate a new round of negotiations. Available actions: View, Send for Review, Delete Quote, Edit Quantity, Delete SKU, Add Comments, Edit Shipping Address</td>
</tr>
</tbody>
</table>

**Negotiating a Quote**

When the seller responds to your request for a quote, the status of the quote changes to “Updated”. Look for an email notification from the store with the reply from the seller. The email includes a link to your account, and the expiration date of the quote. A quote can be changed and resubmitted, even if it was declined or after it has expired.

When a quote is opened, the prices are verified to reflect the current shared catalog prices, cart rules, taxes, and applicable cart discounts. The price verification is performed on unlocked quotes with a status of “New,” “Updated,” or “Open”.

**Step 1: Open the Updated Quote**

1. Do one of the following:
   - If you are already logged in to your account, click the link in the email.
   - Log in to your account.
2. In the account sidebar, choose My Quotes.
3. Find the updated quote in the list, and click **View**.

### My Quotes

<table>
<thead>
<tr>
<th>Quote Name</th>
<th>Created</th>
<th>Created By</th>
<th>Status</th>
<th>Last Updated</th>
<th>Quote Total</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green and Black..</td>
<td>08/23/2017</td>
<td>Lois Price</td>
<td>Updated</td>
<td>08/23/2017</td>
<td>$2,160.00</td>
<td>View</td>
</tr>
<tr>
<td>Track Tote</td>
<td>08/23/2017</td>
<td>Lois Price</td>
<td>Submitted</td>
<td>08/23/2017</td>
<td>$890.00</td>
<td>View</td>
</tr>
<tr>
<td>Tee &amp; Capri</td>
<td>08/22/2017</td>
<td>Lois Price</td>
<td>Pending</td>
<td>08/22/2017</td>
<td>$740.00</td>
<td>View</td>
</tr>
<tr>
<td>Hero Hoodie</td>
<td>08/19/2017</td>
<td>Lois Price</td>
<td>Ordered</td>
<td>08/19/2017</td>
<td>$1,890.00</td>
<td>View</td>
</tr>
</tbody>
</table>

**Step 2: Review the Quote**

1. When you receive an updated quote from the seller, look for any of the following changes on the **Items Quoted** tab:
   - Products added or removed
   - Change in quantity
   - Discounted Quote Subtotal
   - Shipping method
   - Attached file

2. On the **Comments** tab, read the reply from the seller.
Step 3: Reply to the Seller

1. Make any of the following changes to the quote:

Change the Quantity

1. Update the Qty of the line item to be changed.
2. Tap Update to recalculate the totals.

Any previously negotiated items in the totals section are crossed out.

Change the Shipping Address

1. To choose a different address from your address book, do the following:
   a. In the Shipping Information section, click Select Existing Address.
   b. To add a new address, do

2. To add a new address, click Add New Address. Then, follow the instructions.
   - Click Select Existing Address. Then, choose an address from your Address Book. When prompted to confirm, tap Save.
   - Click Add New Address. Then, add the new address to your Address Book.
If the shipping address is changed during a price negotiation, the quote must be sent back to the seller for review.

**Attach a File**

1. Scroll down to the bottom of the quote, and click **Attach file**.
2. Choose the file from the directory.

**Close the Quote**

1. To end the negotiation, add a **Comment** that explains why you are closing the quote.
2. In the header section of the quote, click **Close quote**.
   
   The quote is remains in the My Quotes list in your account, with a status of “Closed”.

**Delete the Quote**

In the header section of the quote, click **Delete**.

The quote is removed from the My Quotes list in your account.

2. Add a **Comment** that briefly explains any changes to the quote.
3. To send your reply to the seller, tap **Send for Review**.
   
   The status of the quote changes to “Submitted.” You can view the quote, but not make any changes until you receive a reply from the seller.

You can repeat the negotiation process as many times as necessary to reach an agreement.

**Step 4: Place the Order**

1. To complete the purchase, tap **Proceed to Checkout**.
2. Then, follow the normal checkout process.
   
   This order is within the company's available credit limit, and is being charged to their account. The Order Summary section shows the quote subtotal, shipping, and the total amount that is to be charged to their account. Because tax is not applicable to this order, it is not included in the Order Summary.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>The box after the page title indicates the current status of the quote.</td>
</tr>
<tr>
<td>Quote Name</td>
<td>The quote name appears below the page title.</td>
</tr>
<tr>
<td>Created</td>
<td>Indicates the date the quote was created, followed by the name of the buyer who requested the quote in parentheses.</td>
</tr>
<tr>
<td>Expires</td>
<td>Indicates the date the quote expires.</td>
</tr>
<tr>
<td>Sales Rep</td>
<td>The seller's sales representative who is assigned to manage the buyer’s company account.</td>
</tr>
<tr>
<td>Close Quote</td>
<td>Ends the negotiation process, and cancels the quote</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes a closed quote from the buyer’s My Quotes list.</td>
</tr>
<tr>
<td>Print</td>
<td>Sends the quote to a printer, or saves it as a PDF file.</td>
</tr>
</tbody>
</table>

### TABBED SECTIONS
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items Quoted</td>
<td><strong>Product Name</strong>: The name of the product is linked to the product detail page in the catalog. Any options that are associated with the product appear below the name.</td>
</tr>
<tr>
<td></td>
<td><strong>SKU</strong>: The product’s unique Stock Keeping Unit.</td>
</tr>
<tr>
<td></td>
<td><strong>Price</strong>: The original product price from the catalog.</td>
</tr>
<tr>
<td></td>
<td><strong>Stock</strong>: The number of units currently in stock.</td>
</tr>
<tr>
<td></td>
<td><strong>Qty</strong>: Indicates the number of units of the product that the buyer wants to purchase. The buyer can update the quantity field during the negotiation.</td>
</tr>
<tr>
<td></td>
<td><strong>Subtotal</strong>: The line item subtotal. <em>(Price * Qty)</em></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Delete" /> <strong>Deletes the line item.</strong></td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Update" /> <strong>Recalculates the quote to reflect any changes.</strong></td>
</tr>
<tr>
<td>Comments</td>
<td>Lists all communications between buyer and seller that are related to the quote.</td>
</tr>
<tr>
<td>History Log</td>
<td>The History Log tab displays a complete history of the quote with dates, quote status, and comments.</td>
</tr>
</tbody>
</table>

### TOTALS

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal (Incl./Excl. Tax)</td>
<td><em>(Visible when section is expanded.) The Catalog Total Price displayed either with, or without tax, according to the Display Subtotal setting in the configuration.</em></td>
</tr>
<tr>
<td>Estimated Tax</td>
<td><em>(Visible when section is expanded.) The amount of tax that is estimated to be due, as specified in the configuration display settings to be based on one of the following:</em></td>
</tr>
<tr>
<td>Catalog Total Price (Incl./Excl. Tax)</td>
<td>The sum of the subtotal and estimated tax. Expand the section to display the values that are used in the calculation.</td>
</tr>
<tr>
<td>Quote Subtotal (Incl./Excl. Tax)</td>
<td>The sum of the proposed prices for each line item in the quote, displayed either with or without tax, depending on the tax calculation settings in the configuration.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Tax</td>
<td>The amount of tax that is estimated to be due, as specified in the configuration <strong>display settings</strong> to be based on one of the following:</td>
</tr>
<tr>
<td></td>
<td>Unit Price</td>
</tr>
<tr>
<td></td>
<td>Row Total</td>
</tr>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>Quote Grand Total (Incl./Excl. Tax)</td>
<td>The final total at the bottom of the quote that includes the negotiated price and estimated tax.</td>
</tr>
</tbody>
</table>

### SHIPPING INFORMATION

<table>
<thead>
<tr>
<th>Shipping Address</th>
<th>The shipping address that was added to the quote from the <strong>address book</strong> in your account.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone</td>
<td>The telephone number is linked to autodial on supporting devices.</td>
</tr>
<tr>
<td>Select Existing Address</td>
<td>Allows you to choose another address from the address book in your account. If you change the address when the negotiation is in process, the quote must be sent back to the seller for review.</td>
</tr>
<tr>
<td>Add New Address</td>
<td>Allows you to add a new address to the address book in your account. Then new address can then be used as the shipping address for the quote.</td>
</tr>
</tbody>
</table>

| Shipping Method                    | Displays the shipping method currently chosen by the seller.                                                                                 |

### QUOTE COMMENTS

<table>
<thead>
<tr>
<th>Add your comment</th>
<th>The comments are used to communicate with the seller during the negotiation process. Enter a comment to explain any discounts requested, or the reason a quote request is closed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach File</td>
<td>The maximum file size and supported file types for <strong>attached files</strong> are determined by the configuration. By default, an attached file can be up to 2 MB, and of any of the following file types: DOC, DOCX, XLS, XLSX, PDF, TXT, JPG or JPEG, PNG.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Send for Review</th>
<th>Sends the updated quote back to the seller for review.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceed to Checkout</td>
<td>Begins the checkout process using the negotiated prices from the quote.</td>
</tr>
</tbody>
</table>
My Orders

You have access to all of your orders from your account dashboard. Orders can be viewed, tracked, and resubmitted as new orders. Depending on the status of the order, you can print orders, invoices, and shipment records.

To view an order:
Find the order in the list, and click View Order. Then from the open order, do any of the following:

Reorder
1. To create a new order that is a duplicate of the current order, click the Reorder link.
2. When the shopping cart appears with the items from the order, you can either continue shopping, or proceed to checkout.

Print Order
1. Click Print Order.
2. Verify the output device, or choose another.
3. Tap Print.
Print Invoices

1. On the Invoices tab, click one of the following:
   
   - Print All Invoices
   - Print Invoice

2. Verify the output device, or choose another.

3. Tap Print.
Print Shipments

1. On the **Order Shipments** tab, click one of the following:
   - Print All Shipments
   - Print Shipment

2. Verify the output device, or choose another.

3. Tap Print.
Order Shipments

**Track a Shipment**

1. On the **Order Shipments** tab, click **Track this Shipment**.
2. Any tracking information that is available appears in a popup window.
3. When ready, tap **Close Window**.

**Print Refunds**

1. On the **Refunds** tab, click one of the following:
   - Print All Refunds
   - Print Refund
2. Verify the output device, or choose another.
3. Tap **Print**.
Refunds

My Downloadable Products

The My Downloadable Products page links to each order of downloadable products. The downloads become available from the dashboard as soon as the order is complete.

To download a product:
1. In your account dashboard, choose My Downloadable Products.
2. Find the order in the list, and click the download link after the title.
3. In the lower-right corner of the download window, click the download icon.
4. Look for the name of the download file to appear in the lower-left corner of the window. Then, save the file.

Download Video
Order by SKU

Order by SKU gives you the ability to add individual products to your cart by SKU and quantity, or import a list of products from a file.

To add products by SKU:

1. Use either, or both of the following methods to add products by SKU:

   Method 1: Add Individual SKUs
   
   1. Enter the SKU and Qty of the product.
   
   2. Tap Add (+) for each additional product that you want to order. Then, enter the SKU and Qty for each line item.
   
   3. When ready, tap Add to Cart.

   Method 2: Import a List of SKUs
   
   1. To prepare the list, do the following:
      
      a. In a spreadsheet, create a file with the column headers “sku” and “qty” in lowercase characters.
      
      b. Enter the sku and qty of each product that you want to import.
      
      c. Save it as a CSV (Comma Separated Value) file.
2. On the Order by SKU page, tap **Choose File**. Then, find the CSV file that you prepared and saved.

3. When complete, tap **Add to Cart**.

2. If any of the products have additional options, you will be prompted from the shopping cart that the product requires your attention.

If you entered duplicate SKUs, the quantities will be combined into a single line item in the shopping cart. Before placing the order, check the quantity ordered to make sure that’s it’s correct. If you change the quantity of any item, tap **Update Shopping Cart** to recalculate the totals.

3. When ready, tap **Proceed to Checkout**.
My Requisition Lists

Using a requisition list saves time when purchasing frequently-ordered products because items are added to the shopping cart directly from the list. You can maintain multiple lists that focus on products from different vendors, buyers, teams, campaigns, or anything else that streamlines your workflow. Up to 999 requisition lists can be maintained for each customer account, depending on the configuration. To enable requisition lists, see: Configuring B2B Features.

To create a requisition list:

1. Do one of the following:

   **Method 1: From Account Dashboard**
   1. In the sidebar of your account dashboard, choose My Requisition Lists.

   **Method 2: From Product Page**
   1. From any product detail page, click Add to Requisition List.
   2. Click Create New Requisition List.

2. Enter the Requisition List Name and Description.

3. When complete, tap Save.
Create Requisition List

To add products to a requisition list:

Products can be added to a requisition list from product pages in the storefront, from the shopping cart, and from existing orders.

Method 1: From the Product Detail Page

1. From the storefront, go to the detail page of the product that is to be added to the requisition list.
2. Click Add to Requisition List. Then, do one of the following:
   - Choose an existing requisition list.
   - Create a new requisition list.

Method 2: From an Existing Order

1. In the sidebar of your account dashboard, choose My Orders.
2. At the top of the order, click **Add to Requisition List**. Then, do one of the following:

- Choose an existing requisition list.
- Create a new requisition list.

---

**Add to Requisition List**

**To view the updated requisition list:**

1. Log in to your customer account. Then, use either of the following methods to view any of your requisition lists.

**Method 1: From Your Account**

1. In the sidebar of your account dashboard, choose **My Requisition Lists**.
2. In the list of requisition lists, under **Actions**, click **View**.

**Method 2: From the Storefront**

1. In the quick links bar at the top of the page, click your user name.
2. On the menu, choose **My Requisition Lists**.

![My Requisition Lists](image1)

### Managing Requisition Lists

The primary reason to maintain a requisition list is to make it easy to reorder products. Items from a requisition list can be easily added to the shopping cart, or moved or copied from one list to another.

![My Requisition Lists](image2)

**To view a requisition list:**

1. From your account dashboard, choose **My Requisition Lists**.
2. Find the requisition list that you want to open, and click **View**. Then, do any of the following:
Add Products to Cart

1. Do one of the following to select the products to be added.
   - Mark the checkbox of each item
   - Click Select All.
2. Enter the Qty to be added to the cart.
3. To change any product options, do the following:
   a. In the line item, click Edit (✓).
   b. Change any options that are necessary.
   c. Tap Update Requisition List.
4. Tap Add to Cart.

![Requisition List Detail]

Move Items to a Different List

1. Mark the checkbox of each item to be moved.
2. Click Move Selected. Then, do one of the following:
   - Choose an existing requisition list.
   - Click Create New Requisition List.
Copy Items to a Different List

1. Mark the checkbox of each item to be moved.
2. Click **Copy Selected**. Then, do one of the following:
   - Choose an existing requisition list.
   - Click **Create New Requisition List**.

Remove Items

1. Mark the checkbox of each item to be removed.
2. Click **Remove Selected**.
3. When prompted to confirm, tap **Delete**.

Rename the List

1. After the list title, click **Rename**.
2. Enter a different **Requisition List Name**.
3. Tap **Save**.

Print the List

1. In the upper-right corner of the list, click **Print**.
2. Verify the output device, and tap **Print**.
### Actions

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rename</td>
<td>Gives you the ability to rename the requisition list, and update the description.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the current requisition list.</td>
</tr>
<tr>
<td>Select</td>
<td>Marks items that are to be the subject of an action.</td>
</tr>
<tr>
<td>Select All</td>
<td>Selects all items in the requisition list.</td>
</tr>
<tr>
<td>Remove Selected</td>
<td>Removes all selected items from the requisition list.</td>
</tr>
<tr>
<td>Copy Selected</td>
<td>Copies all selected items to another requisition list.</td>
</tr>
<tr>
<td>Add to Cart</td>
<td>Adds selected items to the shopping cart.</td>
</tr>
<tr>
<td>Update List</td>
<td>Recalculates the subtotal to reflect a change in quantity.</td>
</tr>
<tr>
<td>Delete Requisition List</td>
<td>Deletes the requisition list from the company user’s account.</td>
</tr>
</tbody>
</table>
My Wish List

Your wish list is a convenient way to keep track of products that you like, but are not ready to buy. Items from your wish list can be shared with others, or added to the shopping cart.

To update the product listing:

1. From your wish list, point to the product to display the options.
2. To add a Comment about the product, enter the text in the box below the price.
3. To change the selection of product options, click **Edit**. Then, do the following:
   a. Update the options on the product detail page.
   b. Click **Update Wish List**.

**To add a product to the cart:**

1. In your wish list, point to the product that you want to add.
2. Update the **Qty** and edit the other options as necessary.
3. Tap **Add to Cart**.

**To share your wish list:**

1. Tap **Share Wishlist**.
2. Enter the email address of each person who is to receive your wish list, separated by a comma.
3. Add a **Message** to be included in the email.
4. Tap **Share Wish List**.
The message is sent from your primary store contact, and includes a thumbnail image of each product, with links to your store.

Shared Wish List Email
Address Book

The Address Book contains the customer’s default billing and shipping addresses, and any additional addresses that they frequently use when placing an order. To speed up the checkout process, make sure to enter any addresses that you frequently use.

To add a new address:

1. In the sidebar of your Account Dashboard, choose Address Book.
2. On the Address Book page, tap Add New Address.
3. Complete the contact and address information.
4. Mark the following checkboxes to indicate how the address is to be used.
   - Use as my default billing address
   - Use as my default shipping address
5. When complete, tap Save Address.
Add New Address

Contact Information

First Name

Last Name

Company

Phone Number

Fax

Address

Street Address

City

State/Province

Zip/Postal Code

Country

United States

Use as my default billing address

Use as my default shipping address

Save Address

Address Book
Account Information

The basic account information includes your name and email address, and password, and can be maintained from your account dashboard.

To update your account information:
In your Account Dashboard, choose Account Information. Then, do any of the following:

**Update Your Name**

1. Update your First Name and Last Name as needed.
   Additional fields appear as part of the name if the Customer Configuration includes a prefix, middle initial, and suffix.
2. Tap Save.

**Change Your Email Address**

1. Mark the Change Email checkbox.
2. Enter your new Email address.
3. Enter your Current Password.
4. Tap Save.
Change Email Address

Change Your Password

1. Mark the **Change Password** checkbox.

2. Enter your **New Password**.

   Choose a strong password that is at least eight characters long. Your password can include a combination of upper and lowercase letters, numbers, and symbols. Use the password strength indicator to help you choose the best password. Then, write it down.

3. When you are ready, enter it again to confirm.

Stored Payment Methods

Customers with access to a secure vault for storing payment information can speed through checkout without entering their credit card information each time. If **Instant Purchase** is
enabled, customers can bypass the two-step checkout process altogether, and place the order from the product page. A payment method that supports a secure vault, such as Braintree, is required.

Stored payment methods are available only for payment methods such as Braintree, that offer a secure vault. When secure vault is enabled in the payment method configuration, customers will have the option during checkout to save their credit card information as a stored payment method. Customers can manage stored payment methods from their account dashboard.

![Stored Payment Methods](image)
Billing Agreements

Customers who enter into a billing agreement with a payment provider can make purchases now and pay for them later, according to the agreement. To learn more, see: PayPal Billing Agreements.
Store Credit

The Store Credit section of your account dashboard lists amounts from returns and refunds that can be applied to future purchases. You can also redeem the value from a gift card.

**To apply store credit during checkout:**

1. Determine the amount of available store credit. During the Review & Payments step, the available amount appears under Store Credit.

2. To apply the amount to the order, tap **Use Store Credit**.
The order total is recalculated, and the amount of store credit that is applied appears in the Order Summary.

Order Summary with Store Credit

3. When ready, tap **Place Order**.
Gift Card

The Gift Card section of your account dashboard can be used to check the balance of your gift card account, and redeem gift cards for store credit.
Company Profile

The information in your company profile was entered when the company account was created. You can access your company profile from the dashboard of your company account to complete any missing information, and to keep it current. To learn more, see: Creating a Company Account.

To edit your company profile:

1. From the storefront, sign in to your company account.
2. In the panel on the left, choose Company Profile.
3. At the top of the page after “Company Profile,” click Edit.
4. Update the fields in the Account Information and Legal Address sections of the form, as needed.
5. When complete, tap Save.
## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACCOUNT INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Company Name</td>
<td>The name of the company as used throughout the system to identify the company.</td>
</tr>
<tr>
<td>Company Legal Name</td>
<td>The full legal name of the company.</td>
</tr>
<tr>
<td>Company Email</td>
<td>The email address that is associated with the company account.</td>
</tr>
</tbody>
</table>
| VAT / TAX ID           | The value-added tax number that is assigned to the company by some jurisdictions for tax reporting purposes.  
                        | To configure the customer VAT/TAX ID to appear in the storefront, see Create New Account Options.                                             |
| Reseller ID            | The resale number that is assigned to the company for tax reporting purposes.                                                               |
| **LEGAL ADDRESS**      |                                                                                                                                              |
| Street Address         | The street address where the company is registered to conduct business.                                                                        |
| City                   | The city where the company is registered to conduct business.                                                                                  |
| Country                | The country where the company is registered to conduct business.                                                                                |
| State/Province         | The state or province where the company is registered to conduct business.                                                                    |
| ZIP/Postal Code        | The ZIP or postal code where the company is registered to conduct business.                                                                    |
| Phone Number           | The primary phone number of the company.                                                                                                       |
Company Credit

The Company Credit section of the customer’s account displays the current outstanding balance, available credit, and the credit limit that is allocated to their account, followed by a list of outstanding invoices.

If the seller cancels an order that was charged to company credit, the amount of the order is returned to the company balance, and a record of the action is added to Credit Allocation History.
Company Structure

Outlines the business structure of the company, as defined by the Company Admin. To learn more, see: Company Structure.
Company Users

Lists the users who are associated with the company. To learn more, see: Company Users.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Email</th>
<th>Role</th>
<th>Year</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Justin Thyne</td>
<td><a href="mailto:jthyne@magento.com">jthyne@magento.com</a></td>
<td>Senior Buyer</td>
<td>Year 5</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Lox Price</td>
<td><a href="mailto:lprice@magento.com">lprice@magento.com</a></td>
<td>Senior Buyer</td>
<td>Year 4</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Maxine Zino</td>
<td><a href="mailto:mzi@magento.com">mzi@magento.com</a></td>
<td>Company Administrator</td>
<td>--</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>

3 items | Show 25 → per page
My Product Reviews

The My Product Reviews section of your account dashboard lists all the reviews that you have submitted from the storefront. Each review summary includes the date the review was submitted, and links to the product page, and review details.
To access your product reviews:

1. In the sidebar of your account dashboard, choose My Product Reviews.
2. To view the full review, click See Details.
Newsletter Subscription

The Newsletter Subscription section of the account dashboard indicates if you are currently subscribed to the general newsletter. Customers can sign up to receive the company newsletter from the footer of the store. If the store doesn’t currently publish a newsletter, it can build a subscription list for a future publication.
CHAPTER 59:

Company Accounts

The Companies grid lists all active company accounts and pending requests, regardless of status setting, and provides the tools needed to create and manage company accounts. Use the standard grid controls to filter the list, and adjust the column layout. For a list of column descriptions, see the Column Descriptions in Managing Company Accounts.

Company accounts can be set up from the storefront, and also from the Admin. By default, the ability to create company accounts from the storefront is enabled. If allowed in the configuration, a visitor to the store can request to open a company account. After the company account is approved, the company administrator can set up the company structure and users with various levels of permission.

To list company accounts:

1. In the Admin sidebar, tap Customers.
2. Choose Companies.
Creating a Company Account

Company accounts can be set up from the storefront by the customer, or from the Admin. All requests to create a company account must be approved by the store administrator before the account becomes active.

The person who sets up a company account from the storefront is usually assigned a role as the company administrator. After the request to create a company account is approved, the company administrator can set an account password and log in to the account.

Method 1: Create Company from Storefront

Before you begin, make sure that B2B Features are enabled in the configuration for the storefront.

1. From the storefront, click the Create an Account link in the upper-right corner of the header. Then, choose Create New Company Account.

2. In the Company Information section, do the following:
   a. Complete the required fields:
      - Company Name
      - Company Email
   b. If the information is available, complete the remaining fields, as applicable.
      - Company Legal Name
      - VAT/TAX ID
      - Re-seller ID
3. Complete all fields in the Legal Address section.

Legal Address

4. In the Company Administrator section, do the following:
   a. Enter the Email address for the company admin.

      The email address for the company admin can be the same as the company email address, or a different email address. If a different email address is entered, a company user account is created, in addition to the company admin account.

   b. Enter the First Name and Last Name of the Company Admin.

   c. Optionally complete the following fields:
      - Job Title
      - Gender
5. When complete, tap **Submit**.

When the request to create a company account is approved by the merchant, an email notification is sent to the company admin with instructions to set the account password. When the password is set, the company admin can sign in to the account.

**Method 2: Create Company from Admin**

The process of creating a company from the Admin is essentially the same as from the storefront, but with additional fields.
1. On the Admin sidebar, tap **Customers**. Then, choose **Companies**.

2. Tap **Add New Company**. Then, do the following:
   a. Complete these required fields:
      - Company Name
      - Company Email
   b. By default, the **Status** of the account is “Active”. If you’re not ready for the account to go live, set Status to “Pending Approval”.
   c. If applicable, choose the Admin account of the **Sales Representative** who is to manage the account.

3. In the **Account Information** section, do the following:
   a. Complete the following fields as applicable
      - Company Legal Name
      - VAT/TAX ID
      - Reseller ID
   b. In the **Comment** field, enter any additional information about the customer that might be needed.

   The Comments are visible only from the Admin.
4. In the **Legal Address** section, complete these required fields:
   - Street Address
   - City Country
   - ZIP/Postal Code
   - Phone Number

5. In the **Company Admin** section, do the following:
   a. Complete these required fields:
      - Email
      - First Name
      - Last Name
   b. The following optional parts of the name might be applicable to some customer names more than others, and can be used at your discretion.
      - Prefix
      - Middle Name/Initial
      - Suffix
   c. If the information is available, complete the remaining fields to describe the Company Admin:
      - Job Title
      - Gender
6. The **Company Credit** section displays a summary of the customer’s credit activity. Complete as many of the fields in the lower part of the section as applicable.

   - Credit Currency
   - Credit Limit
   - Allow to Exceed Credit Limit
   - Reason for Change

7. In the **Advanced Settings** section, do the following:
a. The customer group assignment determines which shared catalog is available to the company and its employees. By default, the company is assigned to the customer group that is set as the default in the configuration.

You can change the **Customer Group** assignment for the Company and its employees to a group that has access to a different shared catalog, or to a standard customer group. You are prompted to confirm before the group is changed.

![Advanced Settings](image)

**Advanced Settings**

b. If you want to allow company employees to generate quotes from their account, set **Allow Quotes** to “Yes”.

c. To change the default payment methods that are available to the company, clear the **Use config settings** checkbox. Then, do one of the following:

- Choose **All Enabled Payment Methods**.
- Choose **Specific Payments**. Then, hold down the Ctrl key, and click each applicable payment method in the list.

8. When complete, tap **Save**.

When the request to create a company account is approved by the merchant, an email notification is sent to the email address of the company admin with instructions to set the account password.

![Email Notification](image)

When the password is set, the company admin can **sign in** to the account.
### Button Bar

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Returns to the Companies page without saving changes.</td>
</tr>
<tr>
<td>Reset</td>
<td>Restores the original values to any fields with unsaved changes.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves changes to the company, and keeps the profile open.</td>
</tr>
<tr>
<td>Save &amp; Close</td>
<td>Saves changes to the company and closes the profile.</td>
</tr>
</tbody>
</table>

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>The company name is entered when the company account is first created, and can be a shortened version of the full legal name.</td>
</tr>
<tr>
<td>Status</td>
<td>(Admin Only) Indicates the current state of the company account. Options:</td>
</tr>
<tr>
<td></td>
<td>Active: The company account is approved by the store administrator. The company administrator and associated members can log in the account from the storefront and make purchases.</td>
</tr>
<tr>
<td></td>
<td>Pending Approval: A request to open a company account has been submitted, but is not yet approved by the store administrator.</td>
</tr>
<tr>
<td></td>
<td>Rejected: A request to open a company account was submitted, but not approved by the store administrator. The initial login credentials that were used to submit the request are blocked.</td>
</tr>
<tr>
<td></td>
<td>Blocked: Company members can log in and access the catalog, but cannot make purchases. The store administrator might block a company account that is not in good standing. The block on the account can be removed by the store administrator at any time.</td>
</tr>
<tr>
<td>Company Email</td>
<td>The email address that is associated with the company account.</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>(Admin Only) The Admin user who is the primary contact for the company account.</td>
</tr>
</tbody>
</table>
## Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACCOUNT INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Company Legal Name</td>
<td>The full legal name of the company.</td>
</tr>
<tr>
<td>VAT / TAX ID</td>
<td>The <em>value-added tax</em> number that is assigned to the company by some jurisdictions for tax reporting purposes. To configure the customer VAT/TAX ID to appear in the storefront, see Create New Account Options.</td>
</tr>
<tr>
<td>Reseller ID</td>
<td>The resale number that is assigned to the company for tax reporting purposes.</td>
</tr>
<tr>
<td>Comment</td>
<td><em>(Admin Only)</em> These notes about the company account are for reference and visible only from the Admin.</td>
</tr>
<tr>
<td><strong>LEGAL ADDRESS</strong></td>
<td></td>
</tr>
<tr>
<td>Street Address</td>
<td>The street address where the company is registered to conduct business.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the company is registered to conduct business.</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the company is registered to conduct business.</td>
</tr>
<tr>
<td>State/Province</td>
<td>The state or province where the company is registered to conduct business.</td>
</tr>
<tr>
<td>ZIP/Postal Code</td>
<td>The ZIP or postal code where the company is registered to conduct business.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The primary phone number of the company.</td>
</tr>
<tr>
<td><strong>COMPANY ADMIN</strong></td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>The title of the company administrator who manages the company account.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the company administrator can be the same as the company email address. If a different email address is entered, a separate individual account is created for the company administrator, in addition to the company account.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>If applicable, the prefix that is associated with the name of the company administrator. For example, Mr., Ms., Mrs., or Dr. Depending on the configuration, the input field might be a text field or drop-down list.</td>
</tr>
<tr>
<td>First Name</td>
<td>The first name of the company administrator.</td>
</tr>
<tr>
<td>Middle Name/Initial</td>
<td>The middle name or initial of the company administrator.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The last name of the company administrator.</td>
</tr>
<tr>
<td>Suffix</td>
<td>If applicable, the suffix that is associated with the name of the company administrator. For example, Jr., Sr., or III. Depending on the configuration, the input field might be a text field or drop-down list.</td>
</tr>
<tr>
<td>Gender</td>
<td>The gender of the company administrator. Options: Male, Female, Not Specified</td>
</tr>
</tbody>
</table>

#### COMPANY CREDIT

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Currency</td>
<td>(Admin Only) The currency that is accepted by the store for purchases on company credit.</td>
</tr>
<tr>
<td>Credit Limit</td>
<td>(Admin Only) The credit limit that is extended to the company account.</td>
</tr>
<tr>
<td>Allow to Exceed Credit Limit</td>
<td>(Admin Only) Indicates if the company has permission to exceed the credit limit. Options: Yes / No</td>
</tr>
<tr>
<td>Reason for Change</td>
<td>(Admin Only) A note that explains why the company is allowed, or disallowed to exceed the credit limit. This field is active only if the permission to exceed the credit limit changes.</td>
</tr>
</tbody>
</table>

#### ADVANCED SETTINGS

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Group</td>
<td>(Admin Only) Indicates the customer group or shared catalog that is assigned to the company.</td>
</tr>
<tr>
<td>Allow Quotes</td>
<td>(Admin Only) Determines if company members can prepare and submit negotiable quotes on behalf of the company.</td>
</tr>
<tr>
<td>Applicable Payment Methods</td>
<td>(Admin Only) Indicates the payment methods that are available for company purchases. Options:</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>B2B Payment Methods</td>
<td>All Enabled Payment Methods</td>
</tr>
<tr>
<td>Specific Payment Methods</td>
<td>(Admin Only) Becomes active if specific payment methods are indicated. Hold down the Ctrl key, and select each payment method that you want to be available to the company account.</td>
</tr>
</tbody>
</table>

Company Admin

The company administrator is initially assigned when the company account is first created, and can later be modified only by the store administrator from the Admin.

Company Administrator

The company administrator is a “super user” with full permissions to manage the company profile, team structure, user accounts, roles, and permissions.

To change the company admin:

1. On the Admin sidebar, tap Customers. Then, choose Companies.
2. Find the company in the list, and click Edit.
3. Expand the Company Admin section. Then, do the following:
a. Enter the **Job Title** of the new company admin.

b. Enter the **Email** address of the new company admin.

   If the system doesn’t find the email address in the database, you are prompted to confirm that you want to replace the company admin.

   Tap **Proceed** to continue.

   The form is cleared, and the required First Name and Last Name fields highlighted.

   - If a user account doesn’t exist for the new company admin, the system creates a new account of the “Company Admin” type.
   
   - If the user account already exists in the system, it is moved to the Company Admin position in the company hierarchy.

   c. Complete the **First Name** and **Last Name**, and any other fields as applicable for the new company admin.

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

   The individual account of the former company admin remains in the system as an active individual user account in the company hierarchy, assigned to the default user role.

   The system sends email notification of the change to the new and former company administrators.
Sales Representative

The sales representative is an Admin user who is assigned as the point of contact for a company account. Only one sales representative can be assigned per company account, but a single sales representative can manage multiple company accounts. The default admin account is assigned as the sales representative, unless a different admin user is assigned.

Sales Representative
The sales representative is the primary point of contact for a company, and receives all automated email messages related to the company.

The name and email address of the assigned sales representative is visible to company members from the company account and quotes page.

To assign a sales representative:

1. On the Admin sidebar, tap Customers. Then choose Companies.
2. Find the company in the grid, and open in edit mode.
3. Set Sales Representative to the Admin user that you want to assign as the point of contact for the company.
4. When complete, tap Save.

The assigned sales representative receives email notification of the assignment.
Approving a Company Account

The status of requests received from the storefront to create a company are “Pending Approval” until the request is reviewed by the store administrator, and either approved or rejected. The status of a company account might be set to any of the following:

- Active
- Pending Approval
- Rejected
- Blocked

You can also use the Actions control to approve multiple company requests. New company requests are easy to find, because they appear at the top of the list in the Companies grid.

To approve a pending company account:

1. On the Admin sidebar, tap Customers. Then, choose Companies.

   All pending requests appear at the top of the list. To make them more noticeable, you can adjust the grid layout to include the Status column.

2. In the Action column, click Edit. Then, do the following:
   a. Set Company Status to “Active”.

   b. When prompted to confirm, tap Change status.

   The company admin receives notification that the company is now active.
3. If applicable, set Sales Representative to a specific Admin account.

4. Expand the Account Information section. Use the Comment field to enter notes about the account. The comments are not visible from the storefront.

5. When complete, tap Save.

A confirmation email is sent to the company and company admin with instructions to set the account password.

### Company Status

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>The company is approved and can be managed from the storefront by the customer.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>A request to create a company account has been submitted from the storefront, but is not yet reviewed</td>
</tr>
<tr>
<td>Rejected</td>
<td>The request to create a company account was rejected by the store administrator.</td>
</tr>
<tr>
<td>Blocked</td>
<td>The company account is no longer in good standing, and the customer cannot access the account from the storefront.</td>
</tr>
</tbody>
</table>
Company Structure

A company account can be set up to reflect the structure of the business. Initially, the company structure includes only the company admin, but can be expanded to include teams of users. The users can be associated with teams, or organized within a hierarchy of divisions and subdivisions within the company.

**Company Structure with Divisions**

In the customer's account dashboard, the company structure is represented as a tree, and initially consists of only the company admin.

**Company Structure with Company Admin**

When the account is created, the company administrator can use the company email address, or be assigned a different email address.

It's possible that the person who serves as company administrator has multiple roles within the company. If a separate email address is entered for the company administrator, the initial company structure includes the company admin, plus an individual user account in the name of the company admin. In such a case, the company administrator can sign in to the account as the company, or as an individual user.
Company Structure

The full company structure is reflected in the Companies and Customers grids. The Companies grid lists all companies regardless of status. The following screenshot shows accounts for two companies: the “ABC Company” and the “XYZ Company.”

Companies Grid

The following screenshot shows the Customers grid with the initial company admin accounts for the “ABC Company” and the “XYZ Company.”

Customers Grid

After creating the account, the company admin must define the company structure of teams, set up the company users, and establish roles and permissions for each.
Creating Company Teams

The structure of a company account should reflect the purchasing organization, whether it is simple and flat, or complex organization with different teams for each subdivision and division of the company.

If your Magento installation is configured to allow companies to manage their own accounts, setting up the company structure is one of the first tasks for a company administrator to complete after the account is approved. In the company account, the structure of the company is represented as a tree, with the company admin at the top.

To set up company teams:

1. Sign in to your account as the company administrator.
2. In the panel on the left, choose Company Structure.
3. Under Business Structure, click Add Team. Then, do the following:
a. Enter the **Team Title** and **Description**.

The Team Title can be anything that represents the structure of the company, such as a team, office, or division within the company.

![Add Team](image)

b. When complete, tap **Save**.

c. Repeat these steps to create as many teams as you need.

### Company Structure with Teams

4. To create a hierarchy of teams, do the following:

   a. Highlight the parent team, and click **Add Team**.

![Business Structure](image)

### Company Structure with Divisions

b. Enter the **Team Title** and **Description**, and tap **Save**.

5. Repeat these steps to create as many teams, or divisions and subdivisions, as you need.
To move a team:
As you're working on the company structure, you can drag teams or divisions to other locations in the company structure.

1. Select the team to be moved, and hold down the mouse button.
2. Drag the team to a new position in the company structure, and release the mouse button.

To delete a team:
Before deleting a team, make sure that the correct team is selected. Deleted teams cannot be restored.

1. Select the team to be deleted.
2. Click Delete Selected. When prompted to confirm, tap Delete.

To expand or collapse the team structure:
As you're working on the company structure, you can collapse or expand the tree, as follows:

- Click Collapse All or Expand All.
- Click ⊖ to collapse a team, or ⊖ to expand a team.
## Company Structure Icons

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>👤</td>
<td>Represents the company administrator in the company structure.</td>
</tr>
<tr>
<td>👤👥</td>
<td>Represents a team in the company structure.</td>
</tr>
<tr>
<td>👤👥</td>
<td>Moves a team to another position in the company structure.</td>
</tr>
<tr>
<td>👤👥</td>
<td>Expands a team in the company structure.</td>
</tr>
<tr>
<td>👤👥</td>
<td>Collapses a team in the company structure.</td>
</tr>
</tbody>
</table>
Company Users

The individuals that are associated with a company are represented in the Customers grid by the customer type, “Company User,” and are typically buyers with varying levels of permission to access store services and resources.

Company Structure with Teams of Users

Company users are assigned by the company administrator, and are visible from the Admin in the Customers grid. For each user, the company administrator first sets up the company structure, and then completes the following tasks, as needed:

- Create company users and assign users to teams
- Define roles and permissions, and assign users to roles

**To add company users:**

1. From the storefront, sign in to your account as the company administrator.
2. In the panel on the left, choose **Company Users**.
3. Tap **Add New User**. Then, do the following:

   a. Enter the **Job Title** of the new user.
   
   b. If the roles and permissions are defined, choose the appropriate **User Role**. Otherwise, you can return later to assign the role.

   c. Complete the remaining fields as needed for the user:
   
      - First Name and Last Name
      - Email
      - Phone Number

   d. By default, the **Status** of the account is “Active”.
4. When complete, tap **Save**.

5. Repeat the process to create as many company users as needed.

The new users appear in the Company Users list, along with the Company Administrator.

To save time during their first order, the company administrator can remind each company user to add the default company billing and shipping address to their address book.

---

**List of Company Users**

**To remove a company user:**

Company users can be removed only by the company admin. Once deleted, the action cannot be reversed. The user is removed from the company structure.

1. Select the company user in the company structure.

2. Click **Delete Selected**.

---

**Delete User**
3. When prompted to confirm, tap **Delete**.

From the Admin, the company user continues to be listed in the Customers grid, but with an “Inactive” status.

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td>The job title of the company user.</td>
</tr>
<tr>
<td>User Role</td>
<td>The role assigned to the company user. Options: Default User / (other roles)</td>
</tr>
<tr>
<td>First Name</td>
<td>The first name of the company user.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The last name of the company user.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the company user.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The phone number of the company user.</td>
</tr>
<tr>
<td>Status</td>
<td>The status of the company user account. Options: Active / Inactive</td>
</tr>
</tbody>
</table>

**Changing the Company Assignment**

If allowed in the configuration, the company admin adds users to the company. However, the company assignment of a customer profile can also be made, or changed from the Admin.

If an individual already has a personal account with the store, and later goes to work for a company, do not assign the person’s individual account to the company. Rather, create a new company user account for the person, with a company email address.

**To assign a customer to a company:**

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 **Account Information**. Then, do the following:
   a. Click the **Associate to Company** field. Then in the input box, type the first few letters of the company name.

   The system generates a list of all possible matches.
b. In the list, select the company to which the customer is to be assigned. Then, tap **Done**.

c. If the customer was previously assigned to a different company, tap **Confirm**.

The customer is reassigned to the customer group — or **shared catalog** — of the company, and the customer is added to its **company structure**.

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

The following columns are updated in the **Customers** grid:

- The Group column changes to the name of the customer group — or shared catalog — that is assigned to the company.
- The Company column displays the name of the company to which the customer profile is now associated.

**Assigning Users to Teams**

When teams and users are first added to the **company structure**, they are placed at the same level under the company administrator.
To assign users to teams:

1. From the storefront, sign in to your account as the company administrator.
2. In the panel on the left, choose **Company Structure**.
3. To assign a user to an existing team, simply drag ( ) the user under the appropriate team.
## Company Structure Icons

<table>
<thead>
<tr>
<th>ICON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>👤</td>
<td>Represents the company administrator in the company structure.</td>
</tr>
<tr>
<td>🟪</td>
<td>Represents a team in the company structure.</td>
</tr>
<tr>
<td>🔥</td>
<td>Moves a team to another position in the company structure.</td>
</tr>
<tr>
<td>⬆️</td>
<td>Expands a team in the company structure.</td>
</tr>
<tr>
<td>⬇️</td>
<td>Collapses a team in the company structure.</td>
</tr>
</tbody>
</table>
Company Roles and Permissions

Roles for company users set up with various levels of permission to access sales information and resources. By default, the company admin is a super user with full permissions. The “Access Denied” page appears if the user doesn’t have permission to access the page.

The system has one predefined Default User role, which you can use “as is,” or modify to suit your needs. You can create as many roles as necessary to match your company structure.

Default User
The default user has full access to activities related to sales and quotes, and view-only access to company profile and credit information.

Senior Buyer
A senior buyer might have access to all Sales and Quotes resources, and view-only permissions to the Company Profile, User and Teams, Payment Information, and Company Credit.

Assistant Buyer
An assistant buyer might have permission to place an order using Checkout with Quote, and to view orders, quotes, and information in the company profile.

To manage roles and permissions:
1. Sign in to your store account as the company administrator.
2. In the panel on the left, choose Roles and Permissions. Then, do any of the following:

Create a role:
1. Tap Add New Role. Then, do the following:
Add New Role

a. Enter a descriptive **Role Name**.

b. Under **Role Permissions**, do one of the following:

- Mark the checkbox of each resource or activity that users assigned the role have permission to access.
- Mark the **All** checkbox. Then, clear the checkbox of each resource or activity that users assigned to the role do not have permission to access.

Roles and Permissions Page with Default Role

2. Tap **Save Role**.

3. Repeat these steps to create as many roles as necessary.
Roles and Permissions

Modify a role:

1. In the list of roles under **Actions**, click **Edit**.
2. Make the necessary changes to the name and permission settings.
3. When complete, tap **Save Role**.

Duplicate a role:

1. In the list of roles under **Actions**, click **Duplicate**.
2. Make the necessary changes to the name and permission settings.
3. When complete, tap **Save Role**.

Delete a role:

1. Find the role to be deleted in the list of roles.
   - Only roles without assigned users can be deleted.
2. In the **Actions** column, click **Delete**.
3. When prompted to confirm, tap **OK**.

**Actions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate</td>
<td>Creates a copy of the selected role. The name of the duplicate role has “- Duplicated” added to the end.</td>
</tr>
<tr>
<td>Edit</td>
<td>Change the name and/or set of permissions.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the role. Only roles without assigned users can be deleted.</td>
</tr>
</tbody>
</table>
Role Permissions

<table>
<thead>
<tr>
<th>PERMISSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
</tr>
<tr>
<td>Sales</td>
</tr>
<tr>
<td>Checkout (place order)</td>
</tr>
<tr>
<td>Use Pay On Account method</td>
</tr>
<tr>
<td>View Orders</td>
</tr>
<tr>
<td>View orders of subordinate users</td>
</tr>
<tr>
<td>Quotes</td>
</tr>
<tr>
<td>View</td>
</tr>
<tr>
<td>Request, Edit, Delete</td>
</tr>
<tr>
<td>Checkout with quote</td>
</tr>
<tr>
<td>View quotes of subordinate users</td>
</tr>
<tr>
<td>Company Profile</td>
</tr>
<tr>
<td>Account Information (View)</td>
</tr>
<tr>
<td>Edit</td>
</tr>
<tr>
<td>Legal Address</td>
</tr>
<tr>
<td>Edit</td>
</tr>
<tr>
<td>Contacts (View)</td>
</tr>
<tr>
<td>Payment Information (View)</td>
</tr>
<tr>
<td>Company User Management</td>
</tr>
<tr>
<td>View roles and permissions</td>
</tr>
<tr>
<td>Manage roles and permissions</td>
</tr>
<tr>
<td>View users and teams</td>
</tr>
<tr>
<td>Manage users and teams</td>
</tr>
<tr>
<td>Company Credit</td>
</tr>
<tr>
<td>View</td>
</tr>
</tbody>
</table>

Assigning User Roles

After defining the roles that are needed, the store admin assigns a role to each company user.

To assign a role to a company user:

1. Log in to your company account as store admin.
2. In the panel on the left, choose Company Users.
3. Find the user in the list, and click **Edit**.

4. Choose the appropriate **User Role** for the user. Then, tap **Save**.
Managing Company Accounts

The Companies page lists all current company accounts, regardless of status. Any pending requests for approval appear at the top of the list. The standard workplace controls can be used to filter the list, change the column layout, save views, and export data.

The Actions control above the grid can be used to apply an action to multiple company records. For example, rather than approving each individual company request, you can select multiple requests and activate the accounts in a single action. The actions that are available depend on the permissions of the user.

Companies Grid

To apply an action:

The following actions can be applied to either single or multiple records.

1. On the Admin sidebar, tap Customers. Then, choose Companies.

2. In the first column of the grid, mark the checkbox of each record that you want to update. Then, follow the instructions for the action that you want to apply:
**Activate Company Accounts**

1. Set the **Actions** control to “Set Active”.
2. When prompted to confirm, tap **OK**.

**Block Company Accounts**

Users who are associated with a blocked company account cannot access the account, or place orders from the store. A company with an account that is not in good standing might be blocked temporarily until the matter is resolved.

1. Set the **Actions** control to “Block”.
2. When prompted to confirm, tap **OK**.

**Delete Company Accounts**

Deleted company accounts cannot be restored. The status of user accounts that are associated with the company is set to “Inactive,” and the Company ID is removed from the profiles of user accounts. Information about company activity and transactions is retained in the system.

1. Set the **Actions** control to “Delete”.
2. When prompted to confirm, tap **OK**.

**Convert the Credit Currency**

The credit in the accounts of selected companies is converted to the current rate of the selected currency.

1. Set the **Actions** control to “Convert Currency”.
2. When prompted to confirm, tap **OK**.
3. Choose the **Credit Currency** to be used for the selected company accounts.

The amounts are recalculated according to the current conversion rates, if available. If not available, you can manually enter custom conversion rates. The system will display as many conversion calculations are needed for the credit currency that is used by the selected companies.

4. Tap **Proceed** to complete the conversion.

**Edit a Company Account**

**Method 1: Quick Edit**

1. In the first column, mark the checkbox of the company account to be edited.
2. Set the **Actions** column to “Edit.”
The value of each value that can be updated appears in a text box.

![Companies screen](image)

**Quick Edit**

3. Update any of the following values as needed:
   - Company Name
   - Company Email
   - Phone Number

4. Tap **Save**.

**Method 2: Full Edit**

1. In the grid, find the company record to be edited.
2. In the **Actions** column on far right, click **Edit**.
3. Make the necessary changes to the company information.
   
   For field descriptions, see: Updating a Company Profile.

4. When complete, tap **Save**.
### Actions Control

<table>
<thead>
<tr>
<th>OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Active</td>
<td>Sets the status of all selected company records to “Active.” Company admins receive instructions to set their passwords so they can access their accounts and manage their companies from the storefront.</td>
</tr>
<tr>
<td>Block</td>
<td>Restricts company accounts that are not in good standing, while preserving the account. The status of users who are associated with a blocked company is changed to “Inactive”. They cannot sign in to their accounts, or place orders on behalf of the company.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes selected company accounts. The status of user accounts that are associated with a deleted company is set to “Inactive,” and the Company ID is removed from the profiles of user accounts. Information about company activity and transactions is retained in the system.</td>
</tr>
<tr>
<td>Edit</td>
<td>Allows some values of the selected company record to be edited from the grid. By default, the following values are available for a quick edit: Company Name, Company Email, Phone Number.</td>
</tr>
<tr>
<td>Convert Credit</td>
<td>Converts the credit on account for the selected companies according to the rates of the specified currency.</td>
</tr>
</tbody>
</table>
## Column Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DEFAULT COLUMN LAYOUT</strong></td>
<td></td>
</tr>
<tr>
<td>Select</td>
<td>Mark the checkbox to select company records that are to be subjects of an action. Or, use the selection control in the column header to select/deselect all.</td>
</tr>
<tr>
<td>ID</td>
<td>A unique numeric identifier that is assigned when the request to create a company is submitted.</td>
</tr>
<tr>
<td>Company Name</td>
<td>The company name is entered when the company account is first created, and can be a shortened version of the full legal name.</td>
</tr>
<tr>
<td>Company Email</td>
<td>The email address that is associated with the company account.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The primary phone number of the company.</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the company is registered to conduct business.</td>
</tr>
<tr>
<td>State Province</td>
<td>The state or province where the company is registered to conduct business.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the company is registered to conduct business.</td>
</tr>
<tr>
<td>Group/Shared Catalog</td>
<td>The column name depends on whether Shared Catalog is enabled in the configuration.</td>
</tr>
<tr>
<td>Customer Group</td>
<td>If Shared Catalog is not enabled in the configuration, specifies the name of the customer group to which the company belongs.</td>
</tr>
<tr>
<td>Shared Catalog</td>
<td>If Shared Catalog is enabled in the configuration, specifies the name of the shared catalog that is assigned to the customer.</td>
</tr>
<tr>
<td>Outstanding Balance</td>
<td>The outstanding balance on the company account. The column is blank if the company does not have a credit history, and its credit limit is zero.</td>
</tr>
<tr>
<td>Company Admin</td>
<td>The first and last name of the company administrator.</td>
</tr>
<tr>
<td>Job Title</td>
<td>The job title of the company administrator.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the company administrator.</td>
</tr>
</tbody>
</table>
### Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Edit</td>
</tr>
</tbody>
</table>

#### ADDITIONAL COLUMNS

The following columns are available by changing the column layout of the grid.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Legal Name</td>
<td>The full legal name of the company.</td>
</tr>
<tr>
<td>Street Address</td>
<td>The street address where the company is registered to conduct business.</td>
</tr>
<tr>
<td>ZIP</td>
<td>The ZIP or postal code where the company is registered to conduct business.</td>
</tr>
<tr>
<td>Reseller ID</td>
<td>The resale number that is assigned to the company for tax reporting purposes.</td>
</tr>
<tr>
<td>VAT/TAX ID</td>
<td>The value-added tax number that is assigned to the company by some jurisdictions for tax reporting purposes. To configure the customer VAT/TAX ID to appear in the storefront, see Create New Account Options.</td>
</tr>
<tr>
<td>Credit Limit</td>
<td>The credit limit that is extended to the company account.</td>
</tr>
<tr>
<td>Credit Currency</td>
<td>The currency that is accepted by the store for purchases on company credit.</td>
</tr>
</tbody>
</table>

**Status**

Indicates the current state of the company account. Options:

<table>
<thead>
<tr>
<th>Active</th>
<th>The company account is approved by the store administrator. The company administrator and associated members can log in the account from the storefront and make purchases.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending Approval</td>
<td>A request to open a company account has been submitted, but is not yet approved by the store administrator.</td>
</tr>
</tbody>
</table>
### Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rejected</td>
<td>A request to open a company account was submitted, but not approved by the store administrator. The initial login credentials that were used to submit the request are blocked.</td>
</tr>
<tr>
<td>Blocked</td>
<td>Company members can log in and access the catalog, but cannot make purchases. The store administrator might block a company account that is not in good standing. The block on the account can be removed by the store administrator at any time.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>The gender of the company administrator. Options: Male, Female, Not Specified</th>
</tr>
</thead>
</table>

| Comment | Notes about the company account for reference and visible only from the Admin. |
Updating a Company Profile

The company profile can be maintained from the storefront by the company admin, and also from the Admin by the store administrator.

To update a company profile:

1. On the Admin sidebar, tap Customers. Then, choose Companies.
2. Find the company in the grid. Then in the Action column, click Edit.
3. Update the field values in each section as needed, using the field descriptions for reference.
4. When complete, tap Save.
## Button Bar

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Returns to the Companies page without saving changes.</td>
</tr>
<tr>
<td>Delete Company</td>
<td>Deletes the company account. The status of user accounts that are associated with the company is set to “Inactive,” and the Company ID is removed from the profiles of user accounts. Information about company activity and transactions is retained in the system.</td>
</tr>
<tr>
<td>Reset</td>
<td>Restores the original values to any fields with unsaved changes.</td>
</tr>
<tr>
<td>Reimburse Balance</td>
<td>Allows the administrator to reimburse the balance from store credit, referenced by PO number.</td>
</tr>
<tr>
<td>Save</td>
<td>Saves changes to the company, and keeps the profile open.</td>
</tr>
<tr>
<td>Save &amp; Close</td>
<td>Saves changes to the company and closes the profile.</td>
</tr>
</tbody>
</table>

## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Name</td>
<td>The company name is entered when the company account is first created, and can be a shortened version of the full legal name.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current state of the company account. Options:</td>
</tr>
<tr>
<td></td>
<td><strong>Active</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Pending Approval</strong></td>
</tr>
</tbody>
</table>
Rejected

A request to open a company account was submitted, but not approved by the store administrator. The initial login credentials that were used to submit the request are blocked.

Blocked

Company members can log in and access the catalog, but cannot make purchases. The store administrator might block a company account that is not in good standing. The block on the account can be removed by the store administrator at any time.

Company Email

The email address that is associated with the company account.

Sales Representative

The Admin user who is the primary contact for the company account.

ACCOUNT INFORMATION

Company Legal Name

The full legal name of the company.

VAT / TAX ID

The tax or value-added tax number that is assigned to the company for tax reporting purposes.

Reseller ID

The resale number that is assigned to the company for tax reporting purposes.

Comment

These notes about the company account are for reference and visible only from the Admin.

LEGAL ADDRESS

Street Address

The street address where the company is registered to conduct business.

City

The city where the company is registered to conduct business.

Country

The country where the company is registered to conduct business.

State/Province

The state or province where the company is registered to conduct business.

ZIP/Postal Code

The ZIP or postal code where the company is registered to conduct business.
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number</td>
<td>The primary phone number of the company.</td>
</tr>
<tr>
<td>COMPANY ADMIN</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>The title of the company administrator who manages the company account.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the company administrator can be the same as the company email address. If a different email address is entered, a separate individual account is created for the company administrator, in addition to the company account.</td>
</tr>
<tr>
<td>Prefix</td>
<td>If applicable, the prefix that is associated with the name of the company administrator. For example, Mr., Ms., Mrs., or Dr. Depending on the configuration, the input field might be a text field or drop-down list.</td>
</tr>
<tr>
<td>First Name</td>
<td>The first name of the company administrator.</td>
</tr>
<tr>
<td>Middle Name/Initial</td>
<td>The middle name or initial of the company administrator.</td>
</tr>
<tr>
<td>Last Name</td>
<td>The last name of the company administrator.</td>
</tr>
<tr>
<td>Suffix</td>
<td>If applicable, the suffix that is associated with the name of the company administrator. For example, Jr., Sr., or III. Depending on the configuration, the input field might be a text field or drop-down list.</td>
</tr>
<tr>
<td>Gender</td>
<td>The gender of the company administrator. Options:</td>
</tr>
<tr>
<td></td>
<td>Male</td>
</tr>
<tr>
<td></td>
<td>Female</td>
</tr>
<tr>
<td></td>
<td>Not Specified</td>
</tr>
<tr>
<td>COMPANY CREDIT</td>
<td></td>
</tr>
<tr>
<td>Credit Currency</td>
<td>The currency that is accepted by the store for purchases on company credit.</td>
</tr>
<tr>
<td>Credit Limit</td>
<td>The credit limit that is extended to the company account.</td>
</tr>
<tr>
<td>Allow to Exceed Credit Limit</td>
<td>Indicates if the company has permission to exceed the credit limit. Options: Yes / No</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason for Change</td>
<td>A note that explains why the company is allowed, or disallowed to exceed the credit limit. This field is active only if the permission to exceed the credit limit changes.</td>
</tr>
</tbody>
</table>

### ADVANCED SETTINGS

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Group</td>
<td>Indicates the customer group or shared catalog that is assigned to the company.</td>
</tr>
<tr>
<td>Allow Quotes</td>
<td>Determines if company members can prepare and submit negotiable quotes on behalf of the company.</td>
</tr>
<tr>
<td>Applicable Payment Methods</td>
<td>Indicates the payment methods that are available for company purchases. Options: B2B Payment Methods, All Enabled Payment Methods, Specific Payment Methods</td>
</tr>
<tr>
<td>Payment Methods</td>
<td>(Admin Only) Becomes active if specific payment methods are indicated. Hold down the Ctrl key, and select each payment method that you want to be available to the company account.</td>
</tr>
</tbody>
</table>
CHAPTER 60:

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.

The selection of customer groups includes all regular customer groups, and shared catalogs, even if Shared Catalogs is not enabled in the configuration. Only one customer group or shared catalog can be assigned to a company at a time.

To create a customer group:


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.
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.

To delete a customer group:

A customer group that is associated with a shared catalog cannot be deleted.

1. On the Admin sidebar, tap Customers. Then choose Customer Groups.

2. Open the record in edit mode.

3. In the button bar, tap Delete Customer Group.

4. When prompted to confirm, tap OK.

5. When complete, tap Save Customer Group.
CHAPTER 61:
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

**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:

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Address Fields</td>
<td>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.</td>
</tr>
<tr>
<td>Customer Information Fields</td>
<td>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.</td>
</tr>
<tr>
<td>Cart Fields</td>
<td>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.</td>
</tr>
<tr>
<td>Products</td>
<td>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.</td>
</tr>
<tr>
<td>Order Fields</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 describes how to create a customer segment that targets the Millennial Generation (born between 1981-1996).

**Process Overview:**
Step 1: Enable Customer Segments
Step 2: Add a Customer Segment
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 left-side pane under **Customers**, tap **Customer Configuration**.
3. Expand the **Customer Segments** section.
4. Verify that **Enable Customer Segment Functionality** is set to “Yes.”

5. When complete, tap **Save Config**.
Step 2: Add a Customer Segment

1. On the Admin sidebar, tap Customers. Then, choose Segments.
2. In the upper-right corner, tap Add Segment.
3. Complete the Segment Information.
   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 Apply to 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 left-side pane.

Segment Information
Step 3: Define the Conditions

1. In the left-side pane, tap **Conditions**. The default condition begins, “If ALL of these conditions are TRUE:”

2. To create a condition that targets the Millennial Generation, do the following:
   
   a. Tap **Add ( )** to display the list of conditions. Then, in the list under Customer, select "Date of Birth".
   
   b. In the condition line after “Customer Date of Birth,” tap **is** and select “equals or greater than”.

   ![](Equals or Greater Than.png)

   c. Tap the default date value and replace with “1977-01-01”. Then, click the green checkmark ( ) to save the condition setting.

   ![](Condition Line 1.png)

   d. On the next line, tap **Add ( )**. Then, in the list under Customers, again select "Date of Birth".

   e. Tap **is** and select “equals or less than”.

   f. Tap the default date value and replace with “1994-12-31”. Then, click the green checkmark ( ) to save the condition setting.
3. Tap **Save and Continue Edit**.

**Step 4: Generate the List of Matched Customers**

1. In the left-side pane, tap **Matched Customers** to display all customers who match the defined condition.

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

The customer segment can now be used for targeting promotions, content, and mailings.
## Segment Information Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segment Name</td>
<td>A name that identifies the segment for internal reference.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description that explains the purpose of the segment for internal reference.</td>
</tr>
<tr>
<td>Assigned to Website</td>
<td>The single website where the segment can be used.</td>
</tr>
<tr>
<td>Status</td>
<td>Activates and deactivates the segment. Any associated price rules and banners are deactivated when the segment is disabled. Options include: Active / Inactive.</td>
</tr>
<tr>
<td>Apply to</td>
<td>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:</td>
</tr>
<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>
</tbody>
</table>
Customer Segments in Price Rules

A customer segment can be targeted by associating it with a cart price rule and banner.

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.
   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:
  - 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**

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.

To associate a customer segment with a banner:

1. 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.

2. Set Customer Segments to “Specified.” Then in the list, select each customer segment that you want to target with the banner.

3. In the panel on the left, choose Related Promotions. Then, mark the checkbox of each related promotion.
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

You can drill down to a list of customers in the segment, and export the data.

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
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 an Order
Updating an Order

Checkout
Checkout Step 1
Checkout Step 2
Order Confirmation

Order Receipt
Checkout Configuration
Checkout Options
Checkout Totals Sort Order
Terms and Conditions
One Page Checkout

Orders
Orders

Orders Workspace
Order Actions
Order Search
Grid Layout
Order Workflow
Processing Orders
Order Status
Order Status Workflow
Custom Order Status
Scheduled Operations
Pending Payment Order Lifetime
Scheduled Grid Updates
Order Archive

Invoices
Creating an Invoice
Printing 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 62:
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.

To display the Sales menu:
On the Admin sidebar, tap Sales.
Menu Options

Quotes
Authorized buyers can negotiation the price with the seller by sending a request from the shopping cart.

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.

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.

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.

Dispatches
For Magento Shipping, lists shipments that are ready for pickup per carrier.
Batches

For Magento Shipping, create batches of shipments that can be booked together.
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
Magento reduces ordering errors by automatically verifying the SKU and availability of all items before an order is submitted. In this section of the guide, you'll learn how to configure the cart and checkout options, and offer assistance to your customers.
CHAPTER 63:

Instant Purchase

Instant Purchase allows customers to speed through the checkout process using information that is saved in their account. When enabled, the Instant Purchase button appears below the Add to Cart button on the product page for customers who meet the requirements.

Customer Requirements

- Customers are signed in to their accounts.
- Customer accounts have a default billing and shipping address.
At least one shipping method is available for the country that is specified in the default shipping address.

Customer accounts have a stored payment method with vault enabled. The following payment methods can be used to provide secure access to saved credit card information:

- Braintree Credit Cards*
- Braintree with PayPal Enabled
- PayPal Payflow Pro

*Instant Purchase cannot be used with Braintree Credit Cards if 3D Secure is enabled.

To make an Instant Purchase:

1. In the storefront, go to the product page of the item to be purchased.
2. Select the required options, and tap **Instant Purchase**.

![Instant Purchase Confirmation](image)

3. Review the **Instant Purchase Confirmation** information. Then, tap **OK** to complete the transaction.

   A confirmation message and order number appears at the top of the product page.

To configure Instant Purchase:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**. Then, do the following:

   **Configure Payment Method Vault**

   The following example shows how to configure the Braintree vault.

   1. In the panel on the left, under **Sales**, choose **Payment Methods**.
   2. In the **Braintree** section under Recommended Solutions, tap **Configure**. Then, do the following:
Configure Braintree

a. In the Basic Braintree Settings section, enter the following information from your Braintree seller account:
   - Merchant ID
   - Public Key
   - Private Key
b. Set Enable this Solution to “Yes.”
c. If applicable set Enable PayPal through Braintree to “Yes.”
d. Set Vault Enabled to “Yes.”

Enable Instant Purchase

1. In the panel on the left, under Sales, choose Sales.
2. Expand the Instant Purchase section, and do the following:
   a. Set Enabled to “Yes.”
   b. Enter the Button Text that you want to appear on the button.
The button text can be changed for each store view, or language. By default, the button text is “Instant Purchase.”

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

3. In the message at the top of the page, click **Cache Management**. Then in the upper-right corner, tap **Flush Magento Cache**.
CHAPTER 64:

Quick Order

Quick Order reduces the order process to several clicks for those who know the product name or SKU of the products they want to order. Orders with multiple SKUs can be entered manually, or imported into the Quick Order form. Quick Order can be used by customers who are logged in to their accounts, as well as by guests. When enabled, the Quick Order link appears at the top of the page, next to the customer name.

Quick Order Link

Step 1: Enable Quick Orders

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **B2B Features**.
3. Set **Enable Quick Order** to “Yes.”

Enable Quick Order

4. Tap **Save Config**.
5. When prompted, click **Cache Management**. Then, refresh any invalid caches.
Step 2: Specify Products for Quick Order

1. Click the Quick Order link. Then, use either of the following methods:

Method 1: Enter Individual Products

1. To place a quick order by SKU, do the following:
   a. Enter the SKU.
   b. Tap Add to List.
      The product detail appears below.

2. To place a quick order by Product Name, do the following:
   a. Enter the first few characters of the Product Name.
   b. When the list of possible matches appears, click the product that you want to order.
      Do not use the Enter key to choose the name of the product.

3. Enter the Qty.

4. Using the next input line, repeat this process as many times as necessary.

5. When complete, tap Add to Cart.
Method 2: **Enter Multiple Products**

1. In the **Enter Multiple SKUs** box, do one of the following:
   - Enter one SKU per line
   - Enter all SKUs on the same line, separated by commas, and without spaces.

![Enter Multiple SKUs]

2. Tap **Add to List**.
   
The products are added to the list above.

3. Enter the **Qty** to be ordered for each item in the list.

![Quick Order List]

  If the product has required options, you are prompted to choose the options. Wait until you reach the shopping cart to add product options.

![You Need to Choose Options]

Method 3: **Upload a List of Products**

1. Under **Add from File**, click **Download Sample**.

![Add from File]

2. Look in the lower left corner of your browser window, and open the file.
a. Use this file as a template, and add the SKUs that you want to upload to the Quick Order list.

b. When complete, save the file.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>sku</td>
</tr>
<tr>
<td>2</td>
<td>qty</td>
</tr>
<tr>
<td>24-UG06</td>
<td>50</td>
</tr>
<tr>
<td>24-UG03</td>
<td>50</td>
</tr>
</tbody>
</table>

**SKUs to Upload**

3. To upload the file, tap **Choose**. Then select the file from your directory. The items are added to the Quick Order list.

**Quick Order List**

2. When ready, tap **Add to Cart**. Then, proceed through checkout as usual.
CHAPTER 65:

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.
Requesting a Quote

If B2B Quotes are enabled in the configuration, an authorized buyer from a company can initiate the price negotiation process by requesting a quote from the shopping cart.

A request for a quote cannot include discount codes or gift cards.

To request a quote:

1. Log in to your company account as a buyer with permission to request a quote.
2. Add the products that are to be included in the quote to the shopping cart.
3. Tap Request a Quote. Then, do the following:
   a. In the Comment box, enter a brief note that describes the request.
   b. Enter a Quote Name.
   c. To attach a supporting document or image to the quote, click Attach file. Then, choose the file from your directory.

By default, an attached file can be up to 2 MB, and of any of the following file types: DOC, DOCX, XLS, XLSX, PDF, TXT, JPG or JPEG, PNG.
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.

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.
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.

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:

   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. If 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.
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 quoted 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 Configuration](image)
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.

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:
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.
4. Set Allow Reorder to your preference.
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:

![Shopping Cart configuration panel]

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**.
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.

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 a separate message and gift wrapping. 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.

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. Then, expand the Gift Options section.
3. Set the **Gift Message** options according to your preference:
   - Allow Gift Messages on Order Level
   - Allow Gift Messages for Order Items

4. Set the **Gift Wrapping** options according to your preference:
   - Allow Gift Wrapping on Order Level
   - Allow Gift Wrapping for Order Items

5. To give customers the option to include a gift receipt with their orders, set **Allow Gift Receipt** to “Yes.”

6. 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**.

7. 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.
To add a new gift wrap design:

1. On the Admin sidebar, tap Stores. Then under Other Settings, choose Gift Wrapping.

![Gift Wrapping](image1)

2. In the upper-right corner, tap Add Gift Wrapping. Then, do the following:

![New Gift Wrapping](image2)

   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.
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>SCOPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift Wrapping Design</td>
<td>Store View</td>
<td>The name of the gift wrap option that appears to customers during checkout. The name can be different for each store view.</td>
</tr>
<tr>
<td>Websites</td>
<td></td>
<td>Select the websites where the new gift wrap will be available.</td>
</tr>
<tr>
<td>Status</td>
<td>Global</td>
<td>Determines if gift wrapping is available. Options: Enabled / Disabled.</td>
</tr>
<tr>
<td>Price</td>
<td>Global</td>
<td>Specifies the price of the gift wrap option. This setting can be overridden by the gift wrap price set at the product level.</td>
</tr>
<tr>
<td>Image</td>
<td>Global</td>
<td>Uploads a thumbnail image of the gift wrap design that appears next to the gift wrap option.</td>
</tr>
</tbody>
</table>
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

4. Expand the Orders, Invoices, Credit Memos Display Settings section. Then, do the following:

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.

When using a persistent cart, it is recommended that you set the lifetime of the server session and the session cookie to a long period of time. To learn more, see: Customer Session Lifetime.
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.

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 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

<table>
<thead>
<tr>
<th>SETTINGS</th>
<th>EFFECT</th>
</tr>
</thead>
</table>
| 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]

   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 Sign Out to one of the following:
Yes  The shopping cart is cleared when a registered customer logs out.

No  The shopping cart is saved 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 guest shopper later logs in or creates a new account, 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 66:

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

![Shopping Cart](image-url)
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.

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.
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.

   ![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.
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**.

---

**Assisted Shopping Mode**

**Add Product to Cart**
The line item is added to the Shopping Cart at the top of the page.

Add a Configurable Product

1. In the grid, click **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 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

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**.

---

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.

   1. Tap **Choose File**.
   2. 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 apply a coupon code, do the following:
   a. In the **Apply Coupon Code** field, enter a valid coupon code.
   b. Click the **Apply (⇒) arrow**.

6. To adjust the quantity ordered:
   a. In the **Qty** column of the product to be adjusted, enter the correct amount.
   b. Click **Update Items and Quantities**.

7. When ready to place the order, tap **Create Order**.
   The Create New Order page shows 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.

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.
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.
6. To add products from the catalog, tap **Add Products**. Then, do the following:

**Add Products**

- In the grid, mark the checkbox of each product to be added to the cart, and enter the Qty to be purchased.
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**.

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.
Updating an Order

After a customer places an order, it is sometimes necessary to edit the information, place it on hold, or cancel it entirely. Only sales orders with a status of “Pending” can be edited or canceled. Both pending sales orders and invoiced orders can be put on hold.

When the invoice is generated, the temporary sales order becomes a permanent order. If you change an invoiced order that has the status of “Processing,” the original order is canceled and a new sales order is generated. You can, however, change the billing or shipping address of an order without generating a new sales order.

When updating a customer order over the phone, you might be required to reenter the payment information, unless the customer used a credit card that is saved in a secure vault.

To edit a sales order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the pending sales order to be edited. Then in the **Action** column, click **View**.
3. Tap **Edit**. When prompted to confirm, tap **OK** to continue.
4. Make the necessary changes to the sales order.
5. When complete, do one of the following:
- To save changes to the billing or shipping address, tap **Save**.
- To save changes to line items, and process the order, tap **Submit Order**.
To change the customer information:

1. In the Orders grid, find the order to be updated. Then in the Action column, click View.
2. Under Account Information, click Edit Customer.
3. In the panel on the left, choose Account Information. Then, make the necessary changes.
   Changing the address information does not recalculate shipping, tax, or other order amount.

4. When complete, tap Save Customer.

   When the changes are saved, you exit to the Customers grid, rather than the Orders grid.
To change the address information:

1. In the Orders grid, find the order to be updated. Then in the Action column, click View.
2. Under Address Information, click Edit to update either the billing or shipping address.
3. Make the necessary changes.
   Changing the address information does not recalculate shipping, tax, or other order amount.
4. When complete, tap Save Order Address.

To put an order on hold:

There are many reasons an order might be put on hold. For example, the customer’s preferred method of payment might become unavailable, or an item might be on backorder. Both pending sales orders and invoiced orders can be put on hold.

1. In the Orders grid, find the order to be put on hold. Then in the Action column, click the View link.
2. In the button bar, tap Hold to place the order on hold.
   The status of the order is now “On Hold.”
3. When you are ready to return the order to an active state, repeat the process and tap Unhold.
To cancel a sales order:

Canceling a sales order changes its status from “Pending” to “Canceled.”

1. In the Orders grid, find the pending sales order to be canceled. Then in the Action column, click View.

2. Tap Cancel. Then when prompted to confirm, tap OK.

The status of the sales order permanently changes to “Canceled.”
CHAPTER 67: 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 format of the street address for the recipient and sender is determined by the properties of the customer address attribute. The input validation setting determines the valid characters that can be used in a shipping address.

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.
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.
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.
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
- Gift Options
- 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.

![Checkout Options](image)

**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**

5. When complete, tap **Save Config**.
**Guest Checkout**

Your store can be configured to require shoppers to open an account before making a purchase. The default setting allows guests to make purchases, with an option to register for an account after they complete the checkout process.

![Checkout Method](image)

*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 applicable, choose the store view where the configuration applies.
   b. When prompted, tap **OK** to continue.
5. Set **Allow Guest Checkout** to your preference:

![Checkout Options](image)

*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.

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.”
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](image)

3. In the Terms and Conditions Information section, complete the following:

   ![New Condition](image)

   - **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.
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.
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.

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.

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.

Quotes

- Quote Workflow
- Negotiating a Quote
- Example Quote

Orders

- Order Workspace
  - Order Actions
  - Order Search
  - Grid Layout

- Order Workflow
  - Processing Orders

Order Status

- Order Status Workflow
- Custom Order Status
- Order Status Notification

Scheduled Operations

- Pending Payment Order Lifetime
- Scheduled Grid Updates

Order Archive

Invoices

- Creating an Invoice
- 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

Company Credit

- Reimbursing Company Balance

Returns

- RMA Workflow
- Configuring Returns
- Returns Attribute

Billing Agreements

Transactions

Archive
CHAPTER 68:
Quotes

If B2B Quotes are enabled in the configuration, an authorized buyer from a company can initiate the price negotiation process by submitting a request to negotiate the price from the shopping cart. The Quotes grid lists each quote received, and maintains a history of the communication between buyer and seller. The standard workplace controls can be used to filter the list, change the column layout, save views, and export data.
**To apply an action:**

The following actions can be applied to either single or multiple records.

1. On the Admin sidebar, tap **Sales.** Then under **Operations,** choose **Quotes.**

2. In the first column of the grid, mark the checkbox of each record that you want to update. Then, follow the instructions for the action that you want to apply:

**View a Quote**

1. Set the **Actions** column, click **View.**

2. Follow the instructions to respond to the customer request, and begin the price negotiation process.

**Decline a Request for a Quote**

Only quote requests with an “Open” status can be declined.

1. Select each open quote request that is to be declined.

2. Set the **Actions** control to “Declined”.

3. When prompted, enter the reason the quote was declined. Then, tap **Confirm.**
### Actions Control

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decline</td>
<td>Only quote requests with an &quot;Open&quot; status can be declined.</td>
</tr>
</tbody>
</table>

### Column Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Mark the checkbox to select the quote(s) to be subject to an action, or use the selection control in the column header. Options: Select All / Deselect All</td>
</tr>
<tr>
<td>ID</td>
<td>A unique numeric identifier that is assigned when a request for a quote is submitted from the shopping cart of a buyer. When viewing the quote detail the ID appears at the top of the page, instead of the quote name.</td>
</tr>
<tr>
<td>Name</td>
<td>The name assigned to a quote request by the buyer.</td>
</tr>
<tr>
<td>Created Date</td>
<td>The date and time the buyer first submitted the request for a quote.</td>
</tr>
<tr>
<td>Company</td>
<td>The name of the company on behalf of which a buyer submits a request for a quote.</td>
</tr>
<tr>
<td>Submitted By</td>
<td>The first and last name of the company buyer who submits a request for a quote.</td>
</tr>
<tr>
<td>Last Updated</td>
<td>The date and time of the last communication between buyer and seller regarding the quote.</td>
</tr>
<tr>
<td>Sales Rep</td>
<td>The first and last name of the sales representative who manages the buyer’s account.</td>
</tr>
<tr>
<td>Quote Total (Base)</td>
<td>The total price of products to be purchased based on the original quote. The total amount appears in the base currency of the website, and in the currency of the storefront.</td>
</tr>
<tr>
<td>Quote Total (Negotiated)</td>
<td>The total price of products to be purchased based on the negotiated quote. The total amount appears in the base currency of the website, and in the currency of the storefront.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current state of a quote request. The status of a quote can be changed only by action on the part of either the buyer or seller. See also the Status settings from the buyer’s account.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>New</td>
<td>The buyer has submitted a request for a quote, but it has not been viewed by the seller. The request can be updated by the buyer until it is opened by the seller.</td>
</tr>
<tr>
<td>Open</td>
<td>The seller has opened the request and is in the process of reviewing it and preparing a response.</td>
</tr>
<tr>
<td>Submitted</td>
<td>The seller has sent a response to the buyer. The quote record cannot be edited during the negotiation process.</td>
</tr>
<tr>
<td>Client Reviewed</td>
<td>The buyer has viewed the response from the seller, and is in the process of preparing a reply.</td>
</tr>
<tr>
<td>Updated</td>
<td>The buyer has submitted a response, but it has not been viewed by the seller.</td>
</tr>
<tr>
<td>Ordered</td>
<td>The buyer submits the order based on the negotiated quote.</td>
</tr>
<tr>
<td>Closed</td>
<td>The buyer has canceled the quote request.</td>
</tr>
<tr>
<td>Declined</td>
<td>The seller has declined the request for a quote. Any custom pricing is removed from the quote, and the record is locked from further edits.</td>
</tr>
<tr>
<td>Expired</td>
<td>The buyer didn’t respond to the seller’s reply within the designated time period, and the quote is no longer valid.</td>
</tr>
<tr>
<td>Actions</td>
<td>View</td>
</tr>
</tbody>
</table>
Quote Workflow

All quotes are initiated by the buyer from the shopping cart, and follow the same basic workflow.

1 **Buyer requests quote.** The buyer requests a quote from the shopping cart. The request appears in the My Quotes list in the account dashboard of the buyer, and email notification is sent to the sales representative who is assigned to the company account. In the Admin, the request appears in the Quotes grid, with a status of “New”. A request for a quote can be modified by the buyer until it is opened by the seller.

2 **Seller views request and sends response.** The seller views the request for a quote. The status of the quote changes to “Pending,” and they cannot make any changes. The seller responds by offering discounted pricing for the products in the quote, enters a comment, and sends the quote back to the buyer. The buyer and sales representative are notified by email that the seller has responded.

3 **Buyer receives response from seller.** The buyer clicks the link in the email to open the quote, or opens the quote from the My Quotes page of the account dashboard. The buyer and seller can continue in the negotiation process until an agreement is reached, or the buyer declines the quote to end the negotiation.

4 **Buyer accepts quote.** The buyer accepts the proposed price and continues to checkout. Additional discounts cannot be added to the negotiated quote.
Negotiating a Quote

If B2B Quotes are enabled in the configuration, an authorized buyer from a company initiates the price negotiation process by requesting a quote from the shopping cart. Requests for quotes received are listed in the Quotes grid. All negotiation between the buyer and seller takes place by email, and is initiated and tracked from the detail view of the quote.

During the negotiation process, the seller can do the following:

- Add or remove products
- Change the quantity
- Apply a discount to the total price
- Add or change the shipping method
- Add comments
- Send the updated quote to the buyer, or save as a draft.

While the quote is open for review, its status in the buyer’s account is set to “Pending”. The buyer can change and resubmit the quote even if it was declined or is expired.

Step 1: View the Request

1. On the Admin sidebar, tap Sales. Then, choose Quotes.

   The new request appears in the Quotes grid.

2. In the Action column, click View.
Step 2: Modify the Quote

1. Under Quote & Account Information, click the Calendar ( ) and choose an Expiration Date for the quote.

2. If the buyer changes the quantity of any items in the quote, a notice appears at the top of the quote, indicating that list of items has changed, and the negotiated price needs to be updated.

3. Scroll down to the Quote Totals section, and update the Negotiated Price as needed.
4. To add new products to the quote, do the following:
   a. Tap **Add Products by SKU**.
   b. Enter the **SKU** and **Qty** to be added.

   ![Add to Quote by SKU](image)

5. To apply a discount to a line item, do the following:
   a. Under **Items Quoted**, make the following changes, if needed:
      - Change the **Quantity** that must be purchased at the Proposed Price.
      - Click **Configure**, and change the product options.
   b. Tap **Add to Quote**. Then, tap **Recalculate the Quote** to reflect the changes.

6. If you want to update the quote with the latest changes to the shared catalog and price rules, tap **Update Prices**. When prompted to confirm, tap **Proceed**.

   ![Items Quoted](image)

7. If the buyer includes a “Ship To” address in the quote, click **Get shipping methods and rates**. Then, do the following:

   ![Shipping Information](image)

   a. Choose a shipping method from the available options.
   b. Enter a **Proposed Shipping Price**.

   The Quote Totals are updated to reflect the proposed shipping price.
If you want to attach a supporting document to the quote, do the following:

a. Under the comments box, click **Attach file**.
   
   By default, an attached file can be up to 2 MB, and of any of the following file types: DOC, DOCX, XLS, XLSX, PDF, TXT, JPG or JPEG, PNG.

b. Choose the file from your directory.

**Step 3: Send Your Reply**

1. In the **Negotiation** section on the **Comments** tab, enter your reply under **Add your comment**.

2. If you want to send the buyer a supporting document, click **Attach file**. Then, select the file from your directory.
   
The maximum file size allowed for attachments is 2 MB.

3. To apply a discount to the quote as a whole, do the following:
   
a. Under **Quote Totals** in the **Negotiated Price** section, choose one of the following discount types:
   
   - Percentage Discount
   - Amount Discount
   - Proposed Price
   
   b. Enter the amount as a percentage or flat price
4. Do one of the following:
   - If the quote is ready to send back to the buyer, tap **Send**.
   - To continue working on the quote later, tap **Save as Draft**.

The system notifies the buyer and the sales rep who manages the company account. The email includes a link to the quote in the buyer's account, and the expiration date of the quote. At any point in the negotiation, the buyer can do any of the following:
   - Accept the negotiated quote and complete the purchase.
   - Send a reply with a counter offer to continue the negotiation.
   - Ends the negotiation.

5. Check your email and the status of the quote in the grid to monitor its position in the workflow. You can continue the negotiation process as long as needed.
Button Bar

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Returns to the Quotes page without saving changes.</td>
</tr>
<tr>
<td>Print</td>
<td>Sends the quote to a printer, or saves it as a PDF file.</td>
</tr>
<tr>
<td>Save as Draft</td>
<td>Save any changes made to the quote, but do not send it back to the buyer.</td>
</tr>
<tr>
<td>Decline</td>
<td>Declines the request to negotiate prices, either on the initial inquiry, or during ongoing negotiations. When a quote is declined, the seller should add a comment to explain the decision. When a quote is declined, all negotiated prices are reset to the original values. The Decline button is disabled while the seller is waiting for a reply from the buyer.</td>
</tr>
<tr>
<td>Send</td>
<td>Sends the updated quote as a reply to the buyer’s inquiry. The Send button is disabled if the seller is waiting for a reply from the buyer.</td>
</tr>
</tbody>
</table>

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUOTE &amp; ACCOUNT INFORMATION</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>The name assigned to a quote request by the buyer.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the current state of the quote. The status of a quote can be changed only by action on the part of either the buyer or seller. See also the Status settings from the Admin and the buyer’s account.</td>
</tr>
<tr>
<td>Created</td>
<td>The date and time the buyer first submitted the request for a quote.</td>
</tr>
<tr>
<td>Created By</td>
<td>The first and last name of the company buyer who submitted the request for a quote.</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Indicates the last day the current quote is valid. The default expiration date is set in the configuration as thirty days after a buyer submits a request for a quote. The seller can override the default expiration date by entering a different date (MMM DD YYYY) or choosing the date from the calendar. The quote never expires if the field is left blank. For open quotes, the seller receives email notification 48 hours before the quote is scheduled to expire. Buyers are notified 24 hours before the expiration date.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>The status of the quote changes to “Expired.” and the buyer cannot make further changes to the quote. The proposed prices in the quote revert to the original values from the catalog. If a quote is open for review by the seller when the quote is set to expire, the expiration date is reset to the period of time that is set in the configuration. The Expiration Date is the only field in the Quote &amp; Account section that can be edited during the review process.</td>
<td></td>
</tr>
<tr>
<td>Company</td>
<td>The legal name of the company that the buyer represents.</td>
</tr>
<tr>
<td>Company Admin Email</td>
<td>The email address of the company administrator.</td>
</tr>
<tr>
<td>Sales Rep</td>
<td>The sales representative who works for the seller, and is the primary contact assigned to the company account.</td>
</tr>
<tr>
<td>Shared Catalog (or Customer Group)</td>
<td>The shared catalog or customer group to which the company is assigned. The quote might include custom prices from the shared catalog that is assigned to the company.</td>
</tr>
</tbody>
</table>

#### ADD TO QUOTE BY SKU

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter SKU</td>
<td>The SKU of the product that is to be added to the quote.</td>
</tr>
<tr>
<td>Qty</td>
<td>The number of items of this SKU to be added to the quote.</td>
</tr>
<tr>
<td><img src="add_to_quote.png" alt="Add to Quote" /></td>
<td>Adds the quantity of the product specified to the quote.</td>
</tr>
</tbody>
</table>

#### ITEMS QUOTED

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name &amp; SKU</td>
<td>The linked product name and stock keeping unit (SKU).</td>
</tr>
<tr>
<td>Stock</td>
<td>The number of product under this SKU that are currently available for sale.</td>
</tr>
<tr>
<td>Cost</td>
<td>The amount the seller paid to purchase the product.</td>
</tr>
<tr>
<td>Catalog Price</td>
<td>The price of the product in the buyer’s catalog, based on the customer group or shared catalog that is assigned to the buyer’s company.</td>
</tr>
<tr>
<td>Cart Price</td>
<td>The original price of the item in the cart, less any discounts applied from the cart. The cart price might differ from the catalog price if there are discounts or cart rules that apply to the buyer’s customer group.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposed Price</td>
<td>The price proposed by the buyer during the negotiation of a quote. The Cart Price and Proposed Price are the same until price negotiation begins.</td>
</tr>
<tr>
<td>Qty</td>
<td>The number of units in this SKU that is the basis for the quoted price. Only a positive number greater than zero can be entered. If you want to change the quantity to zero, delete the line item from the quote.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The proposed price multiplied by the quantity of items ordered.</td>
</tr>
<tr>
<td>Estimated Tax</td>
<td>The amount of tax that is estimated for this line item, according to the configuration: Depending on the Tax Calculation Settings, the estimated tax can be based on any of the following: Unit Price, Row Total, Total</td>
</tr>
<tr>
<td>Subtotal (Incl./Excl. Tax)</td>
<td>Depending on the configuration, this column can display the subtotal with or without estimated taxes.</td>
</tr>
</tbody>
</table>

Configure

Allows you to change the product options for a configurable product.

Update Prices

Updates the quote with the latest changes from the shared catalog and price rules.

Recalculate Quote

Recalculates all quote prices, cart price rules, and tax to reflect changes to the quote.

SHIPPING INFORMATION

Shipping Address
Displays the shipping address that is specified in the buyer’s account. The shipping address is blank if the buyer did not specify an address before submitting the request.

Shipping Method & Price
The Get Shipping Methods and Rates link appears if the buyer includes a “Ship To” address in the quote.

NEGOTIATION

Comments
The Comments tab of the Negotiation section is used to enter a message to the buyer about the quote.
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add your comment</td>
<td>The comments are used to communicate with the buyer during the negotiation process. Use the comments to explain any discounts offered in the quote, or the reason a quote request is declined.</td>
</tr>
<tr>
<td>Attach file</td>
<td>The maximum file size and supported file types for attached files are determined by the configuration. By default, an attached file can be up to 2 MB, and of any of the following file types: DOC, DOCX, XLS, XLSX, PDF, TXT, JPG or JPEG, PNG.</td>
</tr>
</tbody>
</table>

### History Log

The History Log tab displays a complete history of the quote with dates, quote status, and comments.

### QUOTE TOTALS

<table>
<thead>
<tr>
<th>Total Cost</th>
<th>The total cost to the seller of the items included in the quote.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Total Price (Incl./Excl. Tax)</td>
<td>The total price of the items in the quote without tax, according to the prices in the shared catalog or master catalog that is used as the basis of the quote. Expand the section to display the values that are used in the calculation, depending on the Display Subtotal setting in the configuration.</td>
</tr>
<tr>
<td>Subtotal (Excl. Tax)</td>
<td>The Catalog Total Price without estimated tax.</td>
</tr>
<tr>
<td>Subtotal (Incl. Tax)</td>
<td>The Catalog Total Price without estimated tax.</td>
</tr>
<tr>
<td>Estimated Tax</td>
<td>The amount of tax that is estimated to apply to the Catalog Total Price.</td>
</tr>
<tr>
<td>Negotiated Price</td>
<td>The discount that is offered to the buyer can be based on any of the following: <a href="#">Percentage Discount</a>, <a href="#">Amount Discount</a>, <a href="#">Proposed Price</a></td>
</tr>
<tr>
<td>Percentage Discount</td>
<td>The discount as a percentage.</td>
</tr>
<tr>
<td>Amount Discount</td>
<td>The discount as a fixed amount.</td>
</tr>
<tr>
<td>Proposed Price</td>
<td>The price proposed by the seller.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quote Subtotal (Incl./Excl. Tax)</td>
<td>The total proposed price of each line item in the quote, either with or without tax, depending on the tax calculation settings in the configuration.</td>
</tr>
<tr>
<td>Shipping &amp; Handling</td>
<td>The amount entered by the seller in the Proposed Shipping Price field in the Shipping Information section of the quote. If that field is empty, the amount is based on the selected shipping method.</td>
</tr>
<tr>
<td>Estimated Tax</td>
<td>The amount of tax that is estimated to be due, as specified in the configuration display settings.</td>
</tr>
<tr>
<td>Quote Grand Total (Incl. Tax)</td>
<td>The final total at the bottom of the quote that includes the negotiated price, estimated tax, and proposed shipping and handling.</td>
</tr>
</tbody>
</table>
Example Quote
CHAPTER 69: 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.
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.
### Workspace Controls

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create New Order</td>
<td>Creates a new order.</td>
</tr>
<tr>
<td>Go to Archive</td>
<td>Displays the list of archived orders.</td>
</tr>
<tr>
<td>Search</td>
<td>Initiates a search for orders based on the current filters.</td>
</tr>
<tr>
<td>Filters</td>
<td>Defines a set of search parameters that determines the records that appear in the grid.</td>
</tr>
<tr>
<td>Default View</td>
<td>Determines the default column layout of the grid.</td>
</tr>
<tr>
<td>Columns</td>
<td>Determines the selection of columns and their order in the grid. The column layout can be changed, saved as a &quot;view.&quot; By default, only some columns are included in the grid.</td>
</tr>
<tr>
<td>Export</td>
<td>Exports the selected records as a CSV or Excel XML file.</td>
</tr>
</tbody>
</table>

### Column Descriptions

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Mark the checkbox to select the quote(s) to be subject to an action, or use the selection control in the column header. Options: Select All / Deselect All</td>
</tr>
<tr>
<td>ID</td>
<td>A unique, sequential number that is assigned when a new order is saved for the first time.</td>
</tr>
<tr>
<td>Purchase Point</td>
<td>Identifies the store view where the order was placed.</td>
</tr>
<tr>
<td>Purchase Date</td>
<td>The date the order was placed.</td>
</tr>
<tr>
<td>Bill-to Name</td>
<td>The name of the person who is responsible to pay for the order.</td>
</tr>
<tr>
<td>Ship-to Name</td>
<td>The name of the person to whom the order is to be shipped.</td>
</tr>
<tr>
<td>Grand Total (Base)</td>
<td>The grand total of the order.</td>
</tr>
<tr>
<td>Grand Total (Purchased)</td>
<td>The grand total of products purchased in the order.</td>
</tr>
<tr>
<td>Status</td>
<td>The current order status.</td>
</tr>
<tr>
<td>Action</td>
<td>ViewOpens the order in edit mode.</td>
</tr>
<tr>
<td>Signifyd Guarantee Decision</td>
<td>If enabled, Signifyd automatically reviews your orders for fraud, and indicates which orders to ship, and which to reject.</td>
</tr>
</tbody>
</table>
### Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADDITIONAL COLUMNS AVAILABLE</strong></td>
<td></td>
</tr>
<tr>
<td>Billing Address</td>
<td>The billing address of the customer who placed the order.</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>The address where the order is to be shipped.</td>
</tr>
<tr>
<td>Shipping Information</td>
<td>The method that is to be used to ship the order.</td>
</tr>
<tr>
<td>Customer Email</td>
<td>The email address of the person who placed the order.</td>
</tr>
<tr>
<td>Customer Group</td>
<td>The customer group to which the person who placed the order is assigned.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The order subtotal, without shipping and handling, and tax.</td>
</tr>
<tr>
<td>Shipping and Handling</td>
<td>The amount charged for shipping and handling.</td>
</tr>
<tr>
<td>Customer Name</td>
<td>The first and last name of the customer who placed the order.</td>
</tr>
<tr>
<td>Company Name</td>
<td>The name of the company who placed the order.</td>
</tr>
<tr>
<td>Payment Method</td>
<td>The method of payment to be used for the order.</td>
</tr>
<tr>
<td>Total Refunded</td>
<td>Any amount from the order that is to be refunded to the customer.</td>
</tr>
<tr>
<td>Refunded to Store Credit</td>
<td>Any amount from the order that is to be refunded to the customer's store credit.</td>
</tr>
</tbody>
</table>

### 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.
### Action Controls

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| **Actions** | 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:  
  - Cancel  
  - Hold  
  - Unhold  
  - Print Invoices  
  - Print Packing Slips  
  - Print Credit Memos  
  - Print All  
  - Print Shipping Labels  
  - Batch Process |
| **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 / Unselect Visible |
| **Submit** | Applies the current action to the selected order records. |
| **Edit** | Opens the order in edit mode. |
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.
Search Filters

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Filters the search based on order ID.</td>
</tr>
<tr>
<td>Bill-to Name</td>
<td>Filters the search by the name of the person who is responsible to pay for the order.</td>
</tr>
<tr>
<td>Ship-to Name</td>
<td>Filters the search by the name of the person to whom each order is shipped.</td>
</tr>
<tr>
<td>Purchase Point</td>
<td>Filters the search by website, store, or store view where the order was placed.</td>
</tr>
<tr>
<td>Status</td>
<td>Filters the search based on order status. Options:</td>
</tr>
<tr>
<td></td>
<td>Canceled</td>
</tr>
<tr>
<td></td>
<td>Closed</td>
</tr>
<tr>
<td></td>
<td>Complete</td>
</tr>
<tr>
<td></td>
<td>Suspected Fraud</td>
</tr>
<tr>
<td></td>
<td>On Hold</td>
</tr>
<tr>
<td>Purchase Date</td>
<td>Filters the search based on the date purchased. To find orders within a range of dates, enter both the From and To dates.</td>
</tr>
<tr>
<td>Grand Total (Base)</td>
<td>Filters the search based on the Grand Total of each order.</td>
</tr>
<tr>
<td>Grand Total (Purchased)</td>
<td>Filters the search based on Grand Total of items purchased in each order.</td>
</tr>
</tbody>
</table>
Search Filters (cont.)

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Filters</td>
<td>Applies all filters to the search.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels the current search.</td>
</tr>
<tr>
<td>Clear All</td>
<td>Clears all search filters.</td>
</tr>
</tbody>
</table>

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 edited or 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.
**Book a Single Shipment.** When the shipment detail is complete, the shipment is booked, 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.

**Book a Batch of Shipments.** (Magento Shipping only) Enter and process the shipment information for multiple orders as a batch.

**Create a Dispatch.** (Magento Shipping only) Create a dispatch that lists the packages that are ready for pickup, and print the manifest.
Processing an Order

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 edited while pending, and can be canceled up until the time that 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.
To view an order:

1. On the Admin sidebar, tap Sales. Then 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 panel on the left of an open order provides access to different types of information that is related to the order.

To process an order:

1. To open a pending sales order, and tap the 
   Edit button in the upper-right corner.

Orders can be edited only while the status is “Pending”. The Edit button isn’t visible for orders that are “Processing”, or for orders that are based on a negotiated quote.
2. Review the following sections in the sales order, using the field descriptions for reference.

**Order and Account Information**

```
Order Date: Aug 19, 2017, 11:09:59 AM
Order Status: Pending
Order Placed From: #6: Hero Hoodie
Purchased From: Main Website
Placed from IP: 10.236.6.160
```

**Address Information**

```
Billing Address: Lois Price
AG Company
19 Fifth Avenue, Suite 100
San Diego, California, 92103
United States
T: 999-999-9990
```

```
Shipping Address: Lois Price
AG Company
10 Fifth Avenue, Suite 100
San Diego, California, 92103
United States
T: 999-999-9990
```

**Payment & Shipping Method**
**Items Ordered**

<table>
<thead>
<tr>
<th>Product</th>
<th>Item Status</th>
<th>Original Price</th>
<th>Price</th>
<th>Qty</th>
<th>Subtotal</th>
<th>Tax Amount</th>
<th>Tax Percent</th>
<th>Discount Amount</th>
<th>Row Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tretin Endorse</td>
<td>Ordered</td>
<td>$29.00</td>
<td>$29.00</td>
<td></td>
<td></td>
<td>$2.39</td>
<td>8.25%</td>
<td>$0.00</td>
<td>$31.39</td>
</tr>
<tr>
<td>Size: L</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Color: Gray</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. In the **Order Total** section, do the following:

   a. Enter a **Comment** to include with the order.

   b. If you want to email the comment to the customer, mark the **Notify Customer by Email** checkbox.

   c. If you want the comment to be visible in the customer account, mark the **Visible on Storefront** checkbox.

4. If you are ready to invoice the order, tap [Invoice]. Then follow the instructions to **Creating an Invoice**

**Order View Descriptions**

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information</td>
<td>Display detailed information about the order and account, including the billing and shipping addresses, payment and shipping methods, items orders, totals, and notes.</td>
</tr>
</tbody>
</table>
### Order View Descriptions (cont.)

<table>
<thead>
<tr>
<th>TAB</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoices</td>
<td>Lists each invoice that is associated with the order.</td>
</tr>
<tr>
<td>Credit Memos</td>
<td>Lists each credit memo that is associated with the order.</td>
</tr>
<tr>
<td>Shipments</td>
<td>Lists each shipment record that is associated with the order.</td>
</tr>
<tr>
<td>Comments History</td>
<td>Lists all notes that are related to the order.</td>
</tr>
</tbody>
</table>

### Button Bar

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Returns to the Orders page without saving changes.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Cancels the sales order.</td>
</tr>
<tr>
<td>Send Email</td>
<td>Sends an email about the order to the customer.</td>
</tr>
<tr>
<td>Hold / Unhold</td>
<td>Changes the status of the sales order to “On Hold”. To release the hold on the sales order, choose “Unhold”.</td>
</tr>
<tr>
<td>Invoice</td>
<td>Creates an invoice from the sales order by converting the order to an invoice.</td>
</tr>
<tr>
<td>Ship</td>
<td>Creates a shipment record for the order.</td>
</tr>
<tr>
<td>Reorder</td>
<td>Creates a new sales order based on the current order.</td>
</tr>
</tbody>
</table>

Opens a pending order in edit mode. The Edit button isn’t visible for orders with a status of “Processing”, or orders that are based on negotiated quotes.

### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORDER &amp; ACCOUNT INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Order Number</td>
<td>The order number appears at the top of the sales order, and also in the Order &amp; Account Information, followed by a note that indicates if the confirmation email was sent.</td>
</tr>
<tr>
<td>Order Date</td>
<td>The date and time the order was placed.</td>
</tr>
<tr>
<td>Order Placed from Quote</td>
<td>Indicates the quote from which the order was generated, if applicable. The quote name is linked to the quote.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchased From</td>
<td>Indicates the website, store, and store view where the order was placed.</td>
</tr>
<tr>
<td>Placed from IP</td>
<td>Indicates the IP address of the computer from which the order was placed.</td>
</tr>
</tbody>
</table>

Account Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Name</td>
<td>The name of the buyer who placed the order. The Customer Name is linked to the customer profile.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the buyer. The email address is linked to open a new email message.</td>
</tr>
<tr>
<td>Customer Group</td>
<td>The name of the customer group or shared catalog to which the customer is assigned.</td>
</tr>
<tr>
<td>Company Name</td>
<td>The name of the company that employs the buyer, and on whose behalf the order is placed. The company name is linked to the company profile.</td>
</tr>
</tbody>
</table>

ADDRESS INFORMATION

<table>
<thead>
<tr>
<th>Address Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Address</td>
<td>The name of the buyer who placed the order, followed by the company billing address, telephone number and VAT, if applicable. The telephone number is linked to autodial on a mobile device.</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>The name of the person to whose attention the order should be shipped, followed by the company shipping address and telephone number. The telephone number is linked to autodial on a mobile device.</td>
</tr>
</tbody>
</table>

PAYMENT & SHIPPING METHOD

<table>
<thead>
<tr>
<th>Payment Information</th>
<th>The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If the order is charged to company credit, using Payment on Account, the amount charged to the account is indicated.</td>
</tr>
</tbody>
</table>

| Shipping & Handling Information | The shipping method to be used, and any handling fee that is applicable. |

ITEMS ORDERED
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>The product name, SKU, and options if applicable.</td>
</tr>
<tr>
<td>Item Status</td>
<td>Indicates the status of the item. Values: Ordered</td>
</tr>
<tr>
<td>Original Price</td>
<td>The original catalog price of the item before discounts.</td>
</tr>
<tr>
<td>Price</td>
<td>The purchase price of the item. This value reflects any discount applied to the item from the shared catalog, if applicable.</td>
</tr>
<tr>
<td>Qty</td>
<td>The quantity ordered.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The subtotal is the purchase price multiplied by the quantity.</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>The amount of tax that applies to the item as a decimal value.</td>
</tr>
<tr>
<td>Tax Percent</td>
<td>The percentage of tax applied to this item as a percentage.</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>The discount that applies to this item. The discount value is zero if the order is based on a quote.</td>
</tr>
<tr>
<td>Row Total</td>
<td>The line item total, including applicable taxes that are due at the product level, less discounts.</td>
</tr>
</tbody>
</table>

### ORDER TOTAL

#### Notes for this Order

| Status           | Indicate the current status of the sales order.                         |
| Comment          | A text box that is used to enter a comment to the customer that accompanies the order. |
|                  | Notify Customer by Email                                                 |
|                  | Mark the checkbox if you want to send the comment to the customer as a separate email. |
|                  | Visible on Storefront                                                   |
|                  | Mark the checkbox if you want the comment to be visible from the customer’s account. |
|                  | Submit Comment                                                          |
|                  | Submits the comment, and send by email, if applicable.                  |

| Order Totals     | The total price of the items in the quote without tax, according to the prices in the shared catalog or master catalog that is used as the basis of the quote. |
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If the storefront display currency differs from the base currency, the value appears in both currencies, with the storefront display in square brackets.</td>
</tr>
<tr>
<td>Negotiated Discount</td>
<td>The discount that is the result of a quote negotiated between buyer and seller. If the storefront display currency differs from the base currency, the value appears in both currencies, with the storefront display in square brackets.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The Catalog Total Price less the Negotiated Discount.</td>
</tr>
<tr>
<td>Shipping &amp; Handling</td>
<td>The amount charged for shipping and handling fees.</td>
</tr>
<tr>
<td>Tax</td>
<td>The amount of tax applied to the order, if applicable.</td>
</tr>
<tr>
<td>Grand Total</td>
<td>The order total.</td>
</tr>
<tr>
<td>Total Paid</td>
<td>The total amount paid toward the order, if applicable.</td>
</tr>
<tr>
<td>Total Refunded</td>
<td>The total amount refunded from the order, if applicable.</td>
</tr>
<tr>
<td>Total Due</td>
<td>The total amount that is due.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>ORDER STATUS</th>
<th>STATUS CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing</td>
<td>processing</td>
</tr>
<tr>
<td>Suspected Fraud</td>
<td>fraud</td>
</tr>
<tr>
<td>Pending Payment</td>
<td>pending_payment</td>
</tr>
<tr>
<td>Payment Review</td>
<td>payment_review</td>
</tr>
<tr>
<td>Pending</td>
<td>pending</td>
</tr>
<tr>
<td>On Hold</td>
<td>holded</td>
</tr>
<tr>
<td>Open</td>
<td>STATE_OPEN</td>
</tr>
<tr>
<td>Complete</td>
<td>complete</td>
</tr>
<tr>
<td>Closed</td>
<td>closed</td>
</tr>
<tr>
<td>Canceled</td>
<td>canceled</td>
</tr>
<tr>
<td>PayPal Canceled Reversal</td>
<td>paypayCanceled_reversal</td>
</tr>
<tr>
<td>Pending PayPal</td>
<td>pending_paypal</td>
</tr>
<tr>
<td>PayPal Reversed</td>
<td>paypal_reversed</td>
</tr>
</tbody>
</table>
Order Status Workflow

1. New
2. Submit
   - On Hold
   - Pending Payment
     - Processing
     - Payment Received
       - Processing
       - Order Invoiced
         - Processing
         - Order Shipped
           - Complete
           - Order Archived
             - Closed
           - Refunded
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.

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.

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**.

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.
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 Status and State**

<table>
<thead>
<tr>
<th>ORDER STATUS</th>
<th>ORDER STATE</th>
<th>When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing</td>
<td>processing</td>
<td></td>
</tr>
</tbody>
</table>

Order Status and State (cont.)

<table>
<thead>
<tr>
<th>ORDER STATUS</th>
<th>ORDER STATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspected Fraud</td>
<td>fraud</td>
</tr>
<tr>
<td>Pending Payment</td>
<td>pending_payment</td>
</tr>
<tr>
<td>Payment Review</td>
<td>payment_review</td>
</tr>
<tr>
<td>Suspected Fraud</td>
<td>fraud</td>
</tr>
<tr>
<td>Pending</td>
<td>pending</td>
</tr>
<tr>
<td>On Hold</td>
<td>holded</td>
</tr>
<tr>
<td>Complete</td>
<td>complete</td>
</tr>
<tr>
<td>Closed</td>
<td>closed</td>
</tr>
<tr>
<td>Canceled</td>
<td>canceled</td>
</tr>
<tr>
<td>PayPal Canceled Reversal</td>
<td>payment_canceled_</td>
</tr>
<tr>
<td></td>
<td>reversal</td>
</tr>
<tr>
<td>PayPal Reversed</td>
<td>paypal_reversed</td>
</tr>
<tr>
<td>Pending PayPal</td>
<td>pending_paypal</td>
</tr>
</tbody>
</table>

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.

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 Order Operations

Magento cron jobs can be used to schedule the following order management tasks:

- Pending Payment Order Lifetime
- Scheduled Grid Updates

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.
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.”
5. When complete, tap Save Config.
CHAPTER 70:
Invoices

An invoice is a 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.

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.
To invoice an order:

1. On the Admin sidebar, tap Sales. Then under Operations, choose Orders.

2. Find the sales order with the status of “Processing” in the grid. Then, do the following:
   a. In the Action column, click the View link.
   b. In the header of the sales order, choose the Invoice option. The new invoice page looks similar to a completed order page, with additional fields that can be edited.

   The Invoice option does not appear if the payment method is set to “Authorize and Capture.”

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.
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](image)

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."
Create an Invoice

Submit Invoice (Online Payment Method)

Submit Invoice (Offline Payment Method)
# Completed Invoice

## Order & Account Information

**Order # 000000006**

- **Order Date**: Dec 16, 2015, 2:39:10 PM
- **Order Status**: Complete
- **Purchased From**: Main Website
- **Main Website**: English
- **Placed From IP**: 10.237.186.95

## Account Information

- **Customer Name**: Jane Smith
- **Email**: janesmith@example.com
- **Customer Group**: General

## Address Information

**Billing Address**

Jane Smith  
3050 Jefferson Blvd, Suite 200  
Calver City, California, 90232  
United States  
T: 3003-123-4567

**Shipping Address**

Jane Smith  
3050 Jefferson Blvd, Suite 200  
Calver City, California, 90232  
United States  
T: 3003-123-4567

## Payment & Shipping Method

**Payment Information**

- Payment Method: Check / Money order
- The order was placed using USD.

**Shipping Information**

- Shipping Method: Flat Rate
- Total Shipping Charges: $10.00

## Items Invoiced

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Price</th>
<th>Qty</th>
<th>Subtotal</th>
<th>Tax Amount</th>
<th>Discount Amount</th>
<th>Raw Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luna Analog Watch</td>
<td>$60.00</td>
<td>1</td>
<td>$60.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$60.00</td>
</tr>
<tr>
<td>SKU: 24-W029</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Watch</td>
<td>$54.00</td>
<td>1</td>
<td>$54.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$54.00</td>
</tr>
<tr>
<td>SKU: 24-W029</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Order Total

**Invoice History**

**Invoice Totals**

- **Subtotal**: $97.00
- **Shipping & Handling**: $10.00
- **Grand Total**: $107.00

**Comment Text**

- Notify Customer by Email
- Notify on Storefront

Submit Comment
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**.
# Payment Actions

<table>
<thead>
<tr>
<th>PAYMENT ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capture Online</td>
<td>When the invoice is submitted, the system captures the payment from the third-party payment gateway. You have the ability to create a credit memo and void the invoice.</td>
</tr>
<tr>
<td>Capture Offline</td>
<td>When the invoice is submitted, 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.)</td>
</tr>
<tr>
<td>Not Capture</td>
<td>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.</td>
</tr>
</tbody>
</table>

---

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.
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 71:

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, or later.

Magento supports partial and complete order shipment, with additional options depending on Inventory Management, Magento Shipping, and third party extensions.
Shipment Workflow

The value of the Status column in the Shipments grid reflects the state of the shipment as it moves through the workflow. If the Status column isn’t currently visible in the Shipments grid, you can change the grid layout to include the column. Then, use the grid controls to filter the shipments by status.

You receive your customer’s order.

- A quote is generated for the shipment. (Status: Pending)
- The shipment is booked with a carrier. (Status: Fulfilled)

Shipment is dispatched.

- An attempt to dispatch is in progress (Status: Completing)
- The dispatch is complete. (Status: Completed)

Shipment canceled.

- The shipment is canceled. (Status: Canceled)

To show the Shipment Status column:

1. On the Admin menu, choose Sales. Then, choose Shipments.
2. In the upper-right corner, tap the Columns ( ) control.
3. Mark the Shipment Status checkbox.
# Shipment Status

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>A quote has been generated for the shipment, but it is not yet booked with a carrier.</td>
</tr>
<tr>
<td>Fulfilled</td>
<td>A booking has been made for the shipment, and it is ready for dispatch.</td>
</tr>
<tr>
<td>Completing</td>
<td>An attempt to dispatch the shipment is in progress.</td>
</tr>
<tr>
<td>Completed</td>
<td>The dispatch is complete.</td>
</tr>
<tr>
<td>Canceled</td>
<td>The shipment has been canceled.</td>
</tr>
</tbody>
</table>
Creating a Shipment

The following instructions walk you through the process of creating a shipment for Magento Shipping.

To create a shipment:

1. On the Admin sidebar, choose Sales. Then, choose Orders.
2. Find the order in the grid, and open it.
3. If the order has been paid and invoiced, and is ready to ship, tap Ship.
   The sections at the top of the shipment contain name and address and payment information from the sales order.
4. Complete each section of the shipment form as follows:

   **Items Ordered**

   For each line item in the order, enter the Qty Packed.

<table>
<thead>
<tr>
<th>Description</th>
<th>SKU</th>
<th>Weight</th>
<th>Qty Ordered</th>
<th>Qty Shipped</th>
<th>Qty Packed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configurable Product 1</td>
<td>12345</td>
<td>1.2</td>
<td>1</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

   **Items Ordered**

   **Additional Information** (Magento Shipping only)

   Enter a Shipment Reference number to identify the shipment on the customer manifest and shipping labels. The default value is the Magento Customer ID, but can be any other value up to 15 characters.

   **Route Information**

   Under Route Information do the following:

   1. Choose the Origin Location.
      For Magento Shipping, the default location is entered automatically, but can be overridden as necessary.
   2. If applicable, mark the International checkbox.
      For international shipments, the International Item Details and International Shipment Details sections appear in the form.
Packages

In the catalog database, make sure that the weight is entered correctly for all products to be shipped. If using Magento Shipping, also complete the packaging setup, as needed.

Magento Shipping presents a list of predefined carrier packaging after the carrier connects. The list includes all package types offered by the carrier, and the pricing and associated services are updated automatically from the carrier.

The package configuration grid lists only merchant-defined packaging. Carrier-specific packaging does not appear in the grid.

After you choose a package type, the length, width, height, and dimension unit are automatically entered, or “pre-filled.” The following determinations are made to calculate the package weight:

- The weight of the package, as specified in the catalog for each shippable product.
- The tare weight of the selected package type
- The sum of all product weights in the package, as well as the tare weight of the package.

An error occurs if the weight of all items in the package exceeds the maximum weight allowed for the package. The total weight is recalculated whenever the package type or quantity ordered changes. A warning appears below the Total Weight field, as a reminder to verify the values and make any changes necessary.

To enter merchant-defined packaging:

Under Packages do the following:

1. Choose the Package Type.
   - If you choose a prepared package type profile, the measurements are entered automatically.
   - If you choose a Custom package, you must enter the Length, Width, and Height of the package. Then in the Dim. Units field, enter the number of dimensional units used by the package in the delivery vehicle or container.

2. Enter the Weight of the package. If necessary, set the Weight Units field to a different unit of measurement that is used for weight.
3. The Contents field displays the value of the Quantity Packed field under Items Ordered. To change the number of ordered items that are packed in the shipment, enter the updated value in the Contents field. The Quantity Packed value reflects the change.

4. To add another package to the shipment, do the following:
   a. Click Add Another Package.
   b. Complete the description of the package dimensions and weight.

**International Item Details** (if applicable)

Complete the fields in the International Item Details section. If you need help, click the Help ( 🌐 ) button, or refer to the Field Descriptions at the end of this topic.

**International Shipment Details** (if applicable)

Complete the fields in the International Shipment Details section. If you need help, click the Help ( 🌐 ) button, or refer to the Field Descriptions at the end of this topic.
Add-Ons

The selection of value-added delivery options is determined by shipping method and carrier. Some orders shipped with Magento Shipping might have additional options.

1. To give the carrier permission to leave the delivery unattended, mark the **Unattended Delivery** checkbox.

2. To require the carrier to obtain a signature for the delivery, mark the **Signature Required** checkbox.

3. (Magento Shipping UPS - US only) If available and applicable, mark the **Adult Signature Required** checkbox.

4. (Magento Shipping UPS - US only) If you want to prevent the delivery from being redirected or rerouted by the recipient or driver, choose **Direct Delivery Only**.

5. (Magento Shipping UPS - US only) If needed for a time-critical delivery, mark the **Saturday Delivery** checkbox.

6. To identify the type of address, set **Destination Address Type** to one of the following:
   - Business
   - Residential
   - Post Office Box
Shipping Quotes

1. Do one of the following:
   
   - To use the customer’s preferred method of shipping, mark the **Customer Preference** checkbox.
   - To override the customer’s preferred method, clear the **Customer Preference** checkbox. Then, choose another method.

2. Tap **Get Quotes**.

3. In the list of quotes, select the quote you want to use.

   The Book Shipment button in the header is now active, and the Shipping and Tracking Information is completed for the carrier.

**Shipping Comments**

Enter **Comments** for the shipment, if needed.
5. When the shipment is ready, tap **Book Shipment**. Then, do the following:
   a. To view the tracking information, click the **Tracking Number**.

   ![Tracking Information]

   **Tracking Information**

   b. To send the package tracking information to the customer, tap **Send Tracking Information**.
   c. When prompted, tap **OK** to confirm.

   ![Shipping and Tracking Information]

   **Shipping and Tracking Information**

6. A message appears at the top of the page that the shipment has been sent, and the **Documentation** section appears in the shipment form, with a list of available printouts. The following example includes the High Value Report, which is available for Magento Shipping orders over $999.00 (UPS - US only).

   a. In the **Action** column, click the link to **Download** the package label for the shipment. Then, **Print** the label.

   ![Documentation]

   **Documentation**
b. (Magento Shipping only) To print the **High Value Report**, click the **Download** link. Then, look for the text/html file in your browser’s download list.

```
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>Closes the New Shipment form, and returns to the order</td>
</tr>
<tr>
<td>Book Shipment</td>
<td>Adds the shipment to the Dispatch grid.</td>
</tr>
<tr>
<td>Reset</td>
<td>Restores all fields to original values.</td>
</tr>
</tbody>
</table>

**Field Descriptions**

**SHIPPING INFORMATION**

- **Carrier**: The name of the selected carrier.
- **Title**: A descriptive name assigned to the package by the carrier.
- **Number**: The linked tracking number that is assigned to the package.
- **Action**: Deletes the carrier selection.
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Add another carrier to the shipment.</td>
</tr>
</tbody>
</table>

**ADDITIONAL INFORMATION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipment Reference</td>
<td>(Magento Shipping only) Associates bookings between a carrier and a customer, and appears on shipping labels, manifest, and carrier Electronic Data Interchange (EDI) file, if applicable. The default value is the Magento Customer ID, and can be edited if required. Maximum length: 15 (upper- and lowercase characters, numbers 0-9)</td>
</tr>
</tbody>
</table>

**ROUTE INFORMATION**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin Location</td>
<td>Displays a list of available locations.</td>
</tr>
<tr>
<td>International</td>
<td>If checked, identifies the shipment as an international shipment.</td>
</tr>
</tbody>
</table>

**ITEMS ORDERED**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The description of the item.</td>
</tr>
<tr>
<td>SKU</td>
<td>The Stock Keeping Unit of the item.</td>
</tr>
<tr>
<td>Weight</td>
<td>The weight of the item.</td>
</tr>
<tr>
<td>Qty Ordered</td>
<td>The quantity of the item that was ordered.</td>
</tr>
<tr>
<td>Qty Shipped</td>
<td>The quantity of items that have been shipped.</td>
</tr>
<tr>
<td>Qty Packed</td>
<td>The number of items included in this package.</td>
</tr>
</tbody>
</table>

**PACKAGES**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>An automatically generated code that identifies the package.</td>
</tr>
<tr>
<td>Package Type</td>
<td>The type of package.</td>
</tr>
<tr>
<td>Length</td>
<td>The length of the package.</td>
</tr>
<tr>
<td>Width</td>
<td>The width of the package.</td>
</tr>
<tr>
<td>Height</td>
<td>The height of the package.</td>
</tr>
<tr>
<td>Dim. Units</td>
<td>The number of dimensional units used by the package in the delivery vehicle or container.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight</td>
<td>The package weight.</td>
</tr>
<tr>
<td>Weight Units</td>
<td>The unit of measurement used to describe the package weight.</td>
</tr>
<tr>
<td>Contents</td>
<td>A description of the package contents.</td>
</tr>
<tr>
<td>Add Another Package</td>
<td>Adds another package to the shipment.</td>
</tr>
</tbody>
</table>

### INTERNATIONAL ITEM DETAILS

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit of Measure</td>
<td>The unit of measurement used to describe the shipment.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the items in the shipment.</td>
</tr>
<tr>
<td>HS Code</td>
<td>Harmonized System Code</td>
</tr>
<tr>
<td></td>
<td>A commodity classification developed by the World Customs Organization. Also known as the goods code, statistics code, statistics number, or tariff code. For example: 64-67 Footwear / Headgear</td>
</tr>
<tr>
<td>Weight</td>
<td>The weight of the shipment.</td>
</tr>
<tr>
<td>Weight Units</td>
<td>The unit of measurement used to describe the weight.</td>
</tr>
<tr>
<td>Country of Manufacture</td>
<td>The country where the items in the shipment were manufactured.</td>
</tr>
<tr>
<td>Country of Origin</td>
<td>The country where the shipment originated.</td>
</tr>
<tr>
<td>Declared Value</td>
<td>The declared value of the items in the shipment.</td>
</tr>
</tbody>
</table>

### INTERNATIONAL SHIPMENT DETAILS

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signatory Title</td>
<td>The prefix of the name of the person who is authorized to sign for receipt of delivery.</td>
</tr>
<tr>
<td>Signatory First Name</td>
<td>The First Name of the person who is authorized to sign for receipt of delivery.</td>
</tr>
<tr>
<td>Signatory Last Name</td>
<td>The Last Name of the person who is authorized to sign for receipt of delivery.</td>
</tr>
<tr>
<td>International Commerce Terms (Incoterms)</td>
<td>The code for the International Chamber of Commerce rule that applies to this shipment.</td>
</tr>
<tr>
<td>Export Category</td>
<td>The export category that applies to the shipment. Options: Commercial</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents</td>
<td>Gift</td>
</tr>
</tbody>
</table>

| Export Reason | The reason for the export of the shipment. |
| Dutiable Shipment | Indicates if the shipment is subject to duty. Options: Yes / No |
| Invoice Number | The number of the associated invoice. |
| Invoice Date | The date of the associated invoice. |
| EDN | Export Declaration Number |
| | A number issued by the Australian Custom Service when a shipment is accepted for export. |
| EEL | Exemption and Exclusion Legend |
| | When shipping outside the U.S., you must provide either an EEL or a Proof of Filing Citation (PFC). |
| EEI | Electronic Export Information |
| | An electronic declaration of international export information. |
| ITN | International Transaction Number |
| | A number assigned to a shipment that confirms that the EEI was accepted and is on file in the Automated Export System (AES). |

### ADD-ONS

<table>
<thead>
<tr>
<th>ADD-ONS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unattended Delivery</td>
<td>Indicates if the carrier can leave the package unattended at the destination address.</td>
</tr>
<tr>
<td>Signature Required</td>
<td>Indicates if a signature is required.</td>
</tr>
<tr>
<td>Adult Signature Required</td>
<td>(Magento Shipping UPS - US only) Indicates if an adult signature is required.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Delivery Only</td>
<td>(Magento Shipping UPS - US only) Indicates if direct delivery is required. Direct Delivery ensures the package is delivered to the residential or business address. Direct delivery packages cannot be redirected by the recipient, or rerouted by the driver. Direct delivery packages do not require a signature, although you can choose to require one.</td>
</tr>
<tr>
<td>Saturday Delivery</td>
<td>(Magento Shipping UPS - US only) Indicates that the package can be delivered Monday through Saturday. When this option is chosen, only services that support Saturday delivery are listed.</td>
</tr>
<tr>
<td>Destination Address Type</td>
<td>Indicates the type of street address. Options: Residential, Business, Post office box</td>
</tr>
</tbody>
</table>

### SHIPPING QUOTES

- **Quote from Shipping Experience**
  - **Use customer’s choice**
  - **To override the default setting, clear the checkbox, and choose the type of quote.**
  - **Get Quotes**
  - Generates a list of quotes for available carriers. The shipping information and tracking number are completed automatically after the carrier is selected.

### SHIPMENT COMMENTS

- **Comments**
  - Comments about the shipment are for internal use.

### DOCUMENTATION

- **Package Label**
  - **PNG**
  - Download the shipment package label. Size: A6 (105 x 148 mm; 4.1 x 5.6 in.)
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Value Report</td>
<td>Text/HTML</td>
</tr>
</tbody>
</table>

(Magento Shipping only) Download the UPS Control Log for US shipments over $999.00. The report includes the tracking and reference numbers, declared value, and currency. The report includes a signature line to be completed by the delivery person, with pickup time and number of packages. Size: A4 (210 x 297 mm; 8.3 x 11.7 in)
Canceling a Shipment

Before a shipment is dispatched to a carrier, it can be canceled by opening the order and navigating to the shipment, provided the carrier supports cancellations. Some carriers restrict or limit cancellations after a booking. For example, UPS allows cancellations, but requires that you wait 24 hours after the shipment is booked. If a shipment is canceled, the cancellation cannot be reversed. The only recourse is to recreate the order.

**To cancel a shipment:**

1. On the Admin menu, choose **Sales**.
2. Find the order in the grid. Then in the **Action** column, choose **View**.
3. In the panel on the left, choose **Shipments**.
   
   If the shipment can be canceled, a Cancel Shipment button appears in the button bar.
4. Tap **Cancel Shipment**. Then when prompted to confirm, tap **OK**.
   
   The status of the shipment changes to “Canceled.”

   If the carrier does not support cancellations, an error message appears that explains why the shipment couldn’t be canceled.

**Dispatches**

If Magento Shipping is enabled, the Dispatches grid lists all shipments that are ready to ship. For each scheduled pickup, you can create a Dispatch and printed manifest that includes each package that is to be included, per carrier.
To create a dispatch:

1. On the Admin sidebar, choose Sales. Then, choose Dispatches.

2. Click Create Dispatch. Then, do the following:
   a. Choose the Carrier.
   b. Choose the Location where the packages in the manifest are to be picked up. Then, tap Next.

3. To set the date and time of the scheduled pick up, do the following.
   a. In the Ready At field, choose the date from the calendar.

   The date and time must be at least 30 minutes in the future.

   b. Click the Time below the calendar, and choose the scheduled time of the pickup.
4. Tap **Finish** to schedule the dispatch.

The dispatch now appears in the Dispatches grid.

**To view the dispatch detail:**

1. Find the dispatch in the grid. Then in the **Action** column, click **View**.

   **Dispatch Information**

   2. If a problem is encountered while communicating with the carrier, the report will include a failed shipment. Click **Find Solutions** for more information.

   In this case, the problem was caused by a missing or invalid postal code in our sample data.

   **Find a Solution**
Batch processing allows you to process a large number of shipments in a fraction of the time it would take to process the shipments manually. Unlike the standard process to create a shipment, the batch process leverages the Temando API, which is synchronized to your Magento installation.

At this time, batch processing is available only for domestic shipments.

The Batches grid lists the available Magento Shipping batches, the number of shipments in each, and their status. You can view the detail of a single batch, print packing slips, and shipping labels. The grid at the bottom of the page lists the shipments in the batch.

To view batch detail:

1. On the Admin sidebar, choose Sales. Then, choose Batches.
2. Find the batch in the list. Then in the Actions column, click View.
3. To print packing slips for each shipment in the batch, click **Print All Packing Slips**.

4. To print shipping labels, do the following:
   a. Under **Documentation**, click **Download Documentation**.
   b. Look for the ZIP file of labels in your browser’s list of downloads.
   c. Click the download file to view the individual PNG files. Then, open and print each label.
To view shipment detail:

1. Find the shipment in the grid at the bottom of the page

2. In the Action column, click View.

Column Descriptions

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created At</td>
<td>The date and time the batch was created.</td>
</tr>
<tr>
<td>Total No. of Shipments</td>
<td>The number of shipments in the batch.</td>
</tr>
<tr>
<td>No. of Shipments Booked</td>
<td>The number of shipments in the batch that booked properly.</td>
</tr>
</tbody>
</table>
Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Shipments Failed to Book</td>
<td>The number of shipments that failed to book properly. To learn more, see: Troubleshooting.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the batch.</td>
</tr>
<tr>
<td>Actions</td>
<td>View View the batch detail.</td>
</tr>
</tbody>
</table>

Creating a Batch

Orders that are ready to ship with Magento Shipping can be booked together as multiple shipments, and processed as a batch. Each shipment includes a detailed description of the package(s) to be included, with additional instructions for the carrier. The shipment is processed according to the shipping experience rule of your choice. Documentation, including shipping labels, is generated for each package, and is available for download.

Before you begin...

Verify that Magento Shipping is enabled with valid API credentials, and that the Advanced section is complete to synchronize your Magento installation with the Temando API.

Step 1: Create a Shipping Experience Rule

In this step, you will create a Batch Fulfillment Rule to automate the batch processing of shipments. To learn more, see: Shipping Experience Rules.

1. In the Admin sidebar, choose Stores. Then under Shipping, choose Experiences.
2. Tap Create New Experience. Then, do the following:
   a. Enter a descriptive Name for the new rule.
   b. Set the Status of the rule to “Production.”
3. Scroll down to the Batch Fulfillment Rules section. Then, tap Create Rule, and do the following:

   a. Enter a brief Description of the rule that states its purpose and the conditions that trigger the rule.
   b. Because this rule is to run every time, accept the default Condition value of “Always.”
In the Outcomes section, set Action to one of the following:

- Book Shipment with Cheapest Carrier Service
- Book Shipment with Carrier Service

Then, choose the carrier(s) and services that you want to use for fulfilling the orders in the batch.

4. When complete, tap Save.

**Step 2: Process a Batch of Orders**

A batch of orders can be processed if there is one or more in the Orders grid with the status of “Pending.”

1. On the Admin sidebar, choose Sales. Then choose Orders, and do the following:

   a. In the Orders grid, mark the checkbox of each order that you want to include in the batch.
   
   b. Set the Actions control to “Batch Process.”
2. Follow the progress indicator at the top of the page, as you complete the following:
   a. To complete Step 1, choose the **Origin Location** to establish where the orders to be shipped are booked. Then in the upper-right corner, tap **Next**.

   ![Step 1: Choose the Origin](image)

   **Step 1: Choose the Origin**

   b. To complete Step 2, review the orders in the grid. If necessary, clear the checkmark of any order that you do not want to include in the batch. Then, tap **Next**.

   ![Action - Batch Process](image)
Step 2: Confirm Shipments(s) to Process

c. In Step 3, you will complete the detail information for each order in the batch.

The packaging of each item must be defined before the quoting and booking processes can take place. The total weight is calculated based on the weight that is specified in the product record. When a package type is specified, the calculated weight is updated to include the weight of the packaging, if available.

d. This page is wider than most pages, and includes a section for each order in the batch. Do the following to describe each package in each order:

- Choose the Package Type.
- Enter the Total Weight.
- Choose the Weight Unit.
- Enter the number of each item that is included in the package.

e. To ship the order in multiple packages, click Add Another Package. Then, complete the previous step to describe the additional package and its contents.

f. If you need to remove a package, click the Delete icon (  ) to the right of the Weight Unit field.

Items in a removed package are not automatically restored to the previous package. In such a case, it is necessary to update the Package Contents field manually, or add another package.

3. Choose the applicable Shipping Experience.

4. Do the following to specify any optional delivery options:
Under **Add-ons**, choose one of the following types of destination address:

- Business
- Residential
- Post office box

Mark the checkbox of any additional delivery options that apply to the shipment.

The selection of options depends on the carrier and service.

To keep the workspace uncluttered, you can click **Hide Details** after you prepare each order in the batch for booking.

**Step 3: Prepare for Booking**

When complete, tap **Finish**. The new batch appears at the top of the Batches grid, with the status, “Created.” In the grid, the checkbox is marked for all orders that are to be included in the batch. To remove an order from the batch, simple clear its checkbox. are marked with a checkbox.

Batch booking times can vary, depending on the quantity of bookings within a batch, and the carriers used. The status of each batch in the list is updated automatically as batches are booked. A batch can have has one of three possible states:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Indicates a new batch that was just created.</td>
</tr>
<tr>
<td>Processing</td>
<td>Indicates that the shipments for the orders in the batch are still in process, and the booking request is sent to the carrier.</td>
</tr>
<tr>
<td>Processed</td>
<td>Indicates that the batch process has run the booking requests, and response has been received from the carrier(s).</td>
</tr>
</tbody>
</table>
If an order was not successfully booked, it can be processed again during the standard workflow, either individually, or as part of a batch.

**Step 3: View the Batch and Print Documentation**

When a batch receives responses from all of the carriers regarding booking requests, the batch booking request process ends, and the results of the shipment bookings appear in the list. If a batch has shipments that failed to book, you can view the batch to investigate further.

1. In the **Actions** column, click **View** to examine the batch or to access the shipment documentation.

2. Do one of the following to print the documentation associated with the batch:
   - Click **Print All Packing Slips**.
   - Click **Download Documentation Links**.

All of the associated documentation is collated into a single file for you to print. Downloaded documentation is saved as a compressed zip file, and each individual document is saved as a .PNG file.

**Step 4: Dispatch**

The final step in the fulfillment process is to create a dispatch and printed manifest. To continue, see: **Dispatches**.

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STEP 1: SELECT AN ORIGIN LOCATION</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin Location</td>
<td>Identifies where the products to be shipped are located.</td>
</tr>
</tbody>
</table>

#### STEP 2: CONFIRM ORDER(S) TO PROCESS

(checkbox) Confirms each order to be included in the batch.

#### STEP 3: PREPARE ORDER(S) FOR BOOKING

(checkbox) Confirms each shipment to be booked.

**Pack Items**

- **Package Type** Specifies the type of packaging to be used for the shipment.
- **Total Weight** The total weight of the package.
- **Weight Unit** The unit of measurement used for the weight.
- **Package Contents** The number of units from each line item that are in the package.
- **Add Another Package** If the order must be shipped in multiple packages, shows fields for the additional package and contents description.

**Shipping Experience** Determines the shipping experience rule that is to be used for the shipment.

**Add-ons**

- **(Destination Address Type)** Specifies the type of address. Options: Business, Residential, Post office box
- **Unattended Delivery** Indicates if the carrier can leave the package unattended at the destination address.
- **Signature Required** Indicates if a signature is required.
- **Adult Signature Required** (UPS - US only) Indicates if an adult signature is required.
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Delivery Only</td>
<td>(UPS - US only) Indicates if direct delivery is required. Direct Delivery ensures the package is delivered to the residential or business address. Direct delivery packages cannot be redirected by the recipient, or rerouted by the driver. Direct delivery packages do not require a signature, although you can choose to require one.</td>
</tr>
<tr>
<td>Saturday Delivery</td>
<td>(UPS - US only) Indicates that the package can be delivered Monday through Saturday. When this option is chosen, only services that support Saturday delivery are listed.</td>
</tr>
</tbody>
</table>

Error Messages

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Errors when orders are loaded for a batch</td>
<td>Indicates an error occurred when the order information was retrieved. This error is generally encountered with orders that were not created with Magento Shipping.</td>
</tr>
<tr>
<td>Errors when processing a batch</td>
<td>Carriers may not be able to service the specified shipping requirements when quoting, or there may be issues with the API, or the value entered in the configuration. All errors returned for communication with the carrier are listed in the Errors block above the related order. The error message indicates which carrier services has issues with the current shipping configuration. Click <strong>Show Errors</strong> to see all errors returned.</td>
</tr>
<tr>
<td>Failed bookings in a batch</td>
<td>If a booking with a carrier fails, the reason for the failure must be understood to ensure a successful booking next time. To view the causes and identify possible solutions, first view the batch. Then next to the number of failed shipments, click <strong>Find Solutions</strong>. The Find Solutions page describes the order that failed to book, and provides the known reason for failure, or the error that was returned by the platform or carrier.</td>
</tr>
</tbody>
</table>
CHAPTER 72: Credit Memos

A credit memo is a document that shows the amount that is due the customer for a full or partial refund. 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 methods that are available to issue refunds depends on the payment method that was used for the order. Orders that were placed using Store Credit, Payment on Account, or Company Credit can be refunded to the respective account. Orders that were paid by credit card through a payment gateway can be refunded online, by the payment processor. Orders that were paid COD or by check or money order are refunded offline.
Product Return Workflow

1. Customer returns item
2. Create credit memo
3. Select "Return items to inventory"
4. Add note to explain refund
5. Credit or Refund
   - Select "Online Refund"
     - Submit to send credit memo
     - Refund applied to credit card
   - Select "Refund to Store Credit"
     - Submit to send credit memo
     - Refund applied to customer account

Product Return Workflow
Issuing a Credit Memo

Before a credit memo can be printed, it must first be generated for the order. Any credit memo with a status of “open” has an outstanding refund due. 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 only the first credit memo.

If using Vertex Cloud, see the Vertex Settings configuration section for information about issuing refunds for sales orders that are invoiced when the status is either “Suspected Fraud” or “Canceled.”

To issue a credit memo:

1. On the Admin sidebar tap Sales. Then, 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 button bar at the top of the page, 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.

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.

### Refund Totals

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
- Refund to Company Credit
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.
Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORDER &amp; ACCOUNT INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Order Number</td>
<td>The order number appears in the Order &amp; Account Information, followed by a note that indicates if the confirmation email was sent.</td>
</tr>
<tr>
<td>Order Date</td>
<td>The date and time the order was placed.</td>
</tr>
<tr>
<td>Order Status</td>
<td>Indicates the order status as “Complete.”</td>
</tr>
<tr>
<td>Purchased From</td>
<td>Indicates the website, store, and store view where the order was placed.</td>
</tr>
<tr>
<td>Placed from IP</td>
<td>Indicates the IP address of the computer from which the order was placed.</td>
</tr>
<tr>
<td><strong>Account Information</strong></td>
<td></td>
</tr>
<tr>
<td>Customer Name</td>
<td>The name of the buyer who placed the order. The Customer Name is linked to the customer profile.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the buyer. The email address is linked to open a new email message.</td>
</tr>
<tr>
<td>Customer Group</td>
<td>The name of the customer group or shared catalog to which the customer is assigned.</td>
</tr>
<tr>
<td>Company Name</td>
<td>The name of the company that employs the buyer, and on whose behalf the order is placed. The company name is linked to the company profile.</td>
</tr>
<tr>
<td><strong>ADDRESS INFORMATION</strong></td>
<td></td>
</tr>
<tr>
<td>Billing Address</td>
<td>The name of the buyer who placed the order, followed by the company billing address, telephone number and VAT, if applicable. The telephone number is linked to autodial on a mobile device.</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>The name of the person to whose attention the order should be shipped, followed by the company shipping address and telephone number. The telephone number is linked to autodial on a mobile device.</td>
</tr>
<tr>
<td><strong>PAYMENT &amp; SHIPPING METHOD</strong></td>
<td></td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Information</td>
<td>The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order. If the order is charged to company credit, using Payment on Account, the amount charged to the account is indicated.</td>
</tr>
<tr>
<td>Shipping &amp; Handling Information</td>
<td>The shipping method to be used, and any handling fee that is applicable.</td>
</tr>
</tbody>
</table>

#### ITEMS TO REFUND

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>The product name, SKU, and options if applicable.</td>
</tr>
<tr>
<td>Price</td>
<td>The purchase price of the item. This value reflects any discount applied to the item from the shared catalog, if applicable.</td>
</tr>
<tr>
<td>Qty</td>
<td>The quantity ordered.</td>
</tr>
<tr>
<td>Return to Stock</td>
<td>Checkbox that indicates if the returned item is to be returned to stock.</td>
</tr>
<tr>
<td>Qty to Refund</td>
<td>Indicates the number of units returned of the product.</td>
</tr>
<tr>
<td>Subtotal</td>
<td>The subtotal is the purchase price multiplied by the quantity of product units returned.</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>The amount of tax that applies to the returned item as a decimal value.</td>
</tr>
<tr>
<td>Tax Percent</td>
<td>The percentage of tax applied to the returned item as a percentage.</td>
</tr>
<tr>
<td>Discount Amount</td>
<td>Any discount that applies to the returned item.</td>
</tr>
<tr>
<td>Row Total</td>
<td>The line item total, including applicable taxes that are due for the returned product level, less discounts.</td>
</tr>
</tbody>
</table>

#### ORDER TOTAL

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Memo Comments</td>
<td>A text box that is used to enter a comment to the customer about the credit memo.</td>
</tr>
</tbody>
</table>

| Refund Totals       | |
|---------------------| |
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtotal</td>
<td>The total of all line items to be refunded.</td>
</tr>
<tr>
<td>Refund Shipping</td>
<td>The shipping amount to be refunded.</td>
</tr>
<tr>
<td>Adjustment Refund</td>
<td>An amount that is added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping, items, or tax. The amount entered cannot raise the total refund higher than the amount paid.</td>
</tr>
<tr>
<td>Adjustment Fee</td>
<td>An amount that is subtracted from the total amount refunded, such as a restocking fee, or an amount that is related to gift wrapping or gift options.</td>
</tr>
<tr>
<td>Grand Total</td>
<td>The total amount to be refunded</td>
</tr>
<tr>
<td>Append Comments</td>
<td>Checkbox that determines if comments are included in the credit memo.</td>
</tr>
<tr>
<td>Email Copy of Credit Memo</td>
<td>Checkbox that determines if a copy of the credit memo is emailed.</td>
</tr>
</tbody>
</table>

### REFUND BUTTONS

The payment method used for the order determines that refund buttons that are available for a credit memo.

- **Refund Online**
  - If the original purchase was paid by credit card through a payment gateway, the refund amount is managed by the payment processor. To manage refunds, see the documentation provided by your payment provider.

- **Refund Offline**
  - If the original purchase was paid by check or money order, the refund is paid directly to the customer, by issuing a check, gift card, or cash if you have a brick and mortar storefront. The credit memo serves as a record of the offline transaction.

- **Refund to Company Credit**
  - If the purchase was charged to company credit, the refund is returned to the company’s account.
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.

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.

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.
CHAPTER 73:

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.
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.

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.
Configuring Store Credit

The store credit configuration control automatic refunds, the display of available credit in customers’ accounts, and the email template that is used for notifications sent to customers.

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.
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.
CHAPTER 74:

Company Credit

If allowed in the configuration, companies can make purchases on their account up to the credit limit that is granted to the company.
Company Credit Activity

The Company Credit section of the company profile displays a summary of the customer's credit activity, with a grid of the company credit history.

![Company Credit Activity Grid]

Company Credit Reimbursements

The following fields can be set for each company profile:

- Credit Currency
- Credit Limit
- Allow to Exceed Credit Limit
- Reason for Change

If the company has an outstanding balance, a notice to the store administrator appears at the top of the sales order when it is viewed from the Admin. To learn more, see: Creating a Company Account
Receiving Payments

A reimbursed balance is an offline payment that is made by a company toward the balance of their account. The store administrator enters the amount manually in the customer's company profile, using the Reimburse Balance button. When the amount is submitted, the system recalculates the outstanding balance and available company credit, and records the action in the company’s credit history. The reimbursed amount is entered in the credit currency, as specified in the configuration.

To apply a payment to a company account:

1. On the Admin sidebar, tap Customers. Then, choose Companies.
2. Find the company record in the list, and open in Edit mode.
3. In the button bar at the top of the page, tap Reimburse Balance. Then, do the following:
   
   a. Enter the Amount of the payment.
      
      The amount can be entered as a positive or negative value.
   
   b. If applicable, enter the Purchase Order Number for reference.
      
      Only one purchase order number can be entered per reimbursement. To apply the payment to multiple POs, create a separate reimbursement for each.
   
   c. As needed, enter a Comment to describe the reimbursement.
4. When complete, tap Reimburse.

The company’s outstanding balance and available credit is recalculated, and the Company Credit history updated to reflect the reimbursement.
To edit a reimbursement:

1. Open the company profile in **Edit** mode.

2. Expand the **Company Credit** section. Then, do the following:
   
   a. Find the reimbursement transaction in the grid, and click **Edit**.
   
   b. Make any changes necessary to the **Purchase Order Number** and **Comment** fields.

      The reimbursement amount cannot be changed.

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

**Column Descriptions**

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date of the transaction. Hover over the date to display the date and time.</td>
</tr>
<tr>
<td>Operation</td>
<td>The type of activity associated with the transaction. Values:</td>
</tr>
<tr>
<td>Allocated</td>
<td>Credit assigned to the company.</td>
</tr>
<tr>
<td>Updated</td>
<td>A change has been applied to one of the following fields:</td>
</tr>
<tr>
<td>Purchased</td>
<td>An order has been placed.</td>
</tr>
<tr>
<td>Credit limit</td>
<td></td>
</tr>
<tr>
<td>Credit currency</td>
<td></td>
</tr>
<tr>
<td>Allow to exceed credit limit</td>
<td></td>
</tr>
</tbody>
</table>
### Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursed</td>
<td>The outstanding balance has been reimbursed.</td>
</tr>
<tr>
<td>Refunded</td>
<td>A credit memo amount has been refunded</td>
</tr>
<tr>
<td>Reverted</td>
<td>The order was canceled and the amount returned to the credit balance.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Amount</th>
<th>The amount of the transaction associated with the following transaction types:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchased</td>
<td></td>
</tr>
<tr>
<td>Reimbursed</td>
<td></td>
</tr>
<tr>
<td>Refunded</td>
<td></td>
</tr>
<tr>
<td>Reverted</td>
<td>For purchase amounts, the amount appears in the display currency of the store, and also in the format of the credit currency setting,</td>
</tr>
<tr>
<td></td>
<td>followed by the current conversion rate, if applicable. For example: EUR 20,000.00 ($22,400.00)</td>
</tr>
<tr>
<td>USD/EUR 0.8928</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Outstanding Balance</th>
<th>The amount reimbursed, less the total due from all orders placed using the Payment on Account method. The amount might appear as a positive or negative value.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive value</td>
<td>An advance payment is represented as a positive value.</td>
</tr>
<tr>
<td>Negative value</td>
<td>An amount due is represented as a negative value.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Available Credit</th>
<th>The sum of the Credit Limit and the Outstanding Balance. If the customer has exceeded the credit limit, the amount appears as a negative value.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Limit</td>
<td>The amount of credit extended to the company.</td>
</tr>
<tr>
<td>Updated By</td>
<td>The name of the person who initiated the operation.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>The purchase order number that is associated with the transaction.</td>
</tr>
<tr>
<td>Comment</td>
<td>A compilation of the values from the Reason for Change field, according to operation type.</td>
</tr>
</tbody>
</table>
### Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchased</td>
<td>Includes comments from the purchase, and the order number and link to the order.</td>
</tr>
<tr>
<td>Reimbursed</td>
<td>Includes comments from the reimbursed transaction.</td>
</tr>
</tbody>
</table>

**Action**  
For Reimbursed operations only.  
**Edit**  
Allows the reimbursement amount to be updated.
CHAPTER 75:

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.
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.
RMA Customer Experience

Customers can use either of the following to request an RMA from the storefront:

- Orders and Returns Widget in sidebar
- Orders and Returns link in footer

As a best practice, make sure to include a description of your RMA requirements and process in the store's policy.

To request an RMA:

1. In the footer, click Orders and Returns.

2. Enter the following:
   - Order ID
   - Billing Last Name
   - Email

3. Tap Continue.

4. Below the date, click Return.
5. Choose the **Item** to return. Then, enter the **Quantity to Return**.

6. Set **Resolution** to one of the following:
   - Exchange
   - Refund
   - Store Credit

7. Set **Item Condition** to one of the following:
   - Unopened
   - Opened
   - Damaged

8. Set **Reason to Return** to one of the following:
   - Wrong Color
   - Wrong Size
   - Out of Service
   - Other
Create New Return
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.

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:
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.

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.

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.
CHAPTER 76:

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.
CHAPTER 77:

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.
CHAPTER 78: Archive

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 can be archived automatically or manually, and can be viewed at any time.

The Archive option appears in the Sales menu only when archiving is enabled.

To enable archiving:

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, Invoices, Shipments, Credit Memos Archiving section, and do the following:

   a. Set Enable Archiving to “Yes.”

   b. In the Archive Orders Purchased field, enter the number of days to wait before completed orders are archived.

      By default, orders are archived thirty days after the purchase.

   c. In the list, select each Order Status to be Archived. (Hold down the Ctrl key, and click the status of each item to be archived.)
4. When complete, tap **Save Config**.

**To manually archive an order:**

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.

2. Find the order in the grid. Then, mark the checkbox in the first column.

3. Set the **Actions** control to “Move to Archive.”

   Then, look for the message that order has been archived.
To view an archived order:

1. Do one of the following:
   - In the button bar above the Orders grid, click **Go to Archive**.
   - On the Admin sidebar, tap **Sales**. Then under **Archive**, choose **Orders**.

   Like the Orders page, the title of the archived orders page is “Orders.” The only noticeable difference is the option in the button bar to “Return to Order Management.” The URL of the page also indicates that you are in the order archive.

2. In the **Action** column, click **View**.
To restore an archived order:

1. On the Admin sidebar, tap Sales. Then under Operations, choose Orders.
2. In the button bar, click Go to Archive.
3. Mark the checkbox of the archived order to be restored.
4. Set the Actions control to “Remove to Archive.”
   Look for the message that the archived order has been removed from the archive.
5. In the button bar, click Return to Order Management.

Configuring the Archive

Your store can be configured to archive orders, invoices, shipments, and credit memos after a set number of days. 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.

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 Archived list, select each order status settings that identifies the orders to be archived. To select multiple items, hold down the Ctrl key, and click each item.

d. When complete, tap Save Config to save the changes. Then when prompted, refresh any invalid cache.

4. On the Admin sidebar, tap Sales. Then, do any of the following:

View Archived Documents

1. In the Sales menu 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:
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**.
Payments
Contents

In this section of the guide, you will learn about the payment methods, services, and gateways that you can make available to your customers, and how to configure them.

Recommended Solutions

PayPal Express Checkout
PayPal In-Context Checkout
PayPal Billing Agreements
PayPal Settlement Reports
Braintree

Other PayPal Solutions

PayPal Payments Advanced
PayPal Payments Pro
PayPal Payments Standard
PayPal Payflow Pro
PayPal Payflow Link

PayPal Reference

PayPal Business Account
PayPal Credit
PayPal Fraud Management Filter
PayPal by Country

Other Payment Solutions

Authorize.Net Direct Post
CyberSource
eWAY
Worldpay

Basic Payment Methods

Check / Money Order
Cash On Delivery
Payment on Account
Bank Transfer
Purchase Order
Zero Subtotal Checkout

Fraud Protection

Signifyd
CHAPTER 79: 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

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

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. No action is needed to comply with PSD2 because all requirements are handled by PayPal.

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.

PayPal has deprecated support for the sale of digital goods through PayPal Express Checkout, and recommends that you use either PayPal Payments Standard or any other PayPal payment gateway to process any order that includes virtual products.

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.
   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 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.”

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

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 to 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.
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: 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.”
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.”
**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.

   c. Set Time of Day to the hour, minute, and second when you want the reports to be generated.
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.

1. Click to expand the **Frontend Experience Settings** section.

2. 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](image)

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.

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 Agreement Workflow

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.

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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>PayPal Reference ID Type</td>
<td>One of the following reference codes:</td>
</tr>
<tr>
<td></td>
<td>Order ID</td>
</tr>
<tr>
<td></td>
<td>Transaction ID</td>
</tr>
<tr>
<td></td>
<td>Subscription ID</td>
</tr>
<tr>
<td>Preapproved Payment ID</td>
<td>Options include:</td>
</tr>
<tr>
<td></td>
<td>Custom The text entered by the merchant on the transaction in PayPal.</td>
</tr>
<tr>
<td></td>
<td>Transaction Debit or Credit The direction of money movement of gross amount.</td>
</tr>
<tr>
<td></td>
<td>Fee Debit or Credit The direction of money movement for fee.</td>
</tr>
</tbody>
</table>
Braintree

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. Starting with Magento ver. 2.2.10, Braintree provides native support for 3D-Secure 2.0.
To meet PSD2 requirements for earlier versions of Magento, install and configure the official Braintree payment integration extension from Magento Marketplace. Older Braintree implementations running on JavaScript SDK v2 do not support 3D Secure 2.0.

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.

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:

![Configure Braintree](image)

**Configure Braintree**

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. Enter the **Merchant ID** from your Braintree account.

e. Enter the following credentials from your Braintree account:
   - Public Key
   - Private Key
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.”

---

**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. Enter the **Merchant ID** from your Braintree account.

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.

---

**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.
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.”
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 minimum order amount that is required to trigger 3D verification.

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.
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

There are two parts to the Name descriptor, which are separated by an asterisk (*). For example:

cOMPANY*myProduct

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.

<table>
<thead>
<tr>
<th>Characters in Name Descriptor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>Option 1</td>
</tr>
<tr>
<td>Option 2</td>
</tr>
<tr>
<td>Option 3</td>
</tr>
</tbody>
</table>

Phone

The Phone descriptor must be ten to fourteen characters in length, and can include only numbers, dashes, parentheses, and periods. For example:

9999999999
(999) 999-9999
999.999.9999

URL

The URL descriptor represents your domain name, and can be up to thirteen characters long. For example: company.com

2. When your Braintree configuration is complete, tap **Save Config**.
Other PayPal Solutions

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. For most PayPal solutions, no action is needed to comply with PSD2 because the requirements are handled by PayPal. For information about specific PayPal solutions, see the note at the top of each page.

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento for B2B 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 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 Payments Advanced

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, PayPal Payments Advanced must be integrated with Cardinal Commerce. To learn more, see 3-D Secure for Payflow.

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.

3. **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.

4. **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.
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 PayPal fraud filters. The system receives the response from PayPal that the transaction is under review by Fraud Service.

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 for B2B Commerce online user guide.
PayPal Payments Pro

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, PayPal Payments Pro must be integrated with Cardinal Commerce. To learn more, see 3-D Secure for Website 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.

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 for B2B Commerce online user guide.

Setting Up PayPal Payment Pro
PayPal Payments Standard

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. No action is needed to comply with PSD2 because all requirements are handled by PayPal.

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.

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 on their personal PayPal accounts is up to date.
Customer Places Order. The customer taps the “Pay Now” button to complete the purchase.

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.
PayPal Payflow Pro

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, PayPal Payflow Pro must be integrated with Cardinal Commerce. To learn more, see 3-D Secure for Payflow.

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.

Checkout with PayPal

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**

Before you begin, set up your PayPal Payments Advanced account on the PayPal website.
1. Log in to your PayPal business account.

2. In the PayPal Manager menu, choose Service Settings. Under Hosted Checkout Pages, click Set Up. Then, do the following:

   a. Under Choose your settings, set Transaction Process Mode to “Live”.

   b. Under Display options on payment page, set Cancel URL Method to “POST”.

   c. Under Billing Information, mark the card security code CSC checkboxes for both required and editable fields.
**Billing Information**

d. Under **Payment Confirmation**, set **Return URL Method** to “POST”.

**Payment Confirmation**

e. Under **Security Options**, make the following settings:

- AVS: No
- CSC: No
- Enable Secure Token: Yes

**Security Options**

f. When complete, tap **Save Changes**.

3. In the PayPal Manager menu, again choose **Service Settings**. Then under **Hosted Checkout Pages**, choose **Customize**, and do the following:
a. Choose **Layout C**.

![Customize Your Page](image)

*Customize Your Page*

Layout C shows only credit and debit card fields, and can either be framed on your site or used as a stand-alone popup. The size is fixed at 490 x 565 pixels, with extra space for error messages. On some systems, this setting corrects an issue with transparent redirect.

![Layout C Example](image)

*Layout C Example*

b. Tap **Save and Publish**.

4. In the PayPal Manager menu, choose **Account Administration**. Under **Manage Security**, click **Transaction Settings**. Then, do the following:

a. Set **Allow reference transactions** to “Yes”.

b. Tap **Confirm**.

If you have multiple Magento websites, you must create a separate PayPal Payments Advanced account for each.
PayPal recommends that you set up an additional user on your account. To set up an additional user, do the following:

a. In the second row of the main menu, click **Manage Users**.

b. To add another user to the account, click **Add User**. The link is located just above the Manage Users title.

c. Complete the required fields in the following sections of the Add User form:
   - Admin Confirmation
   - User Information
   - User Login Information
   - Assign Privilege to User

   When complete, tap **Update**. Then in the upper-right corner, click **Log Out**.

**Step 2: Complete the Required Settings**

1. Return to Magento to complete the required settings. If the session lifetime timed out while you were working in PayPal Manager, you’ll have to log in again.

2. 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.

3. Under **PayPal Payment Gateways**, in the **PayPal Payflow Pro** section, tap **Configure**.
Compile

4. 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.”

5. 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.
6. Set **Enable This Solution** to “Yes.”

7. If you want to offer PayPal Credit to your customers, set **Enable PayPal Credit** to “Yes.”

**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**.
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 × 100
      - 234 × 60
      - 300 × 50
      - 468 × 60
      - 728 × 90
      - 800 × 66

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.
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.”

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

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.

c. Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.

---

**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.

1. Expand the **Frontend Experience Settings** section.

2. 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.
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.”
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.”
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

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, PayPal Payflow Link must be integrated with Cardinal Commerce. To learn more, see 3-D Secure for Payflow.

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.
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.”

Customer Submits the Order. The credit card information is submitted directly to PayPal, and is not retained anywhere on the Magento site.

Order Workflow

PayPal Receives Request. PayPal receives the request from the customer to Pay Now.

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 PayPal fraud filters. 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.”

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.

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 for B2B Commerce online user guide.

PayPal Payflow Link Setup
### PayPal Reference

<table>
<thead>
<tr>
<th>PAYPAL SOLUTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXPRESS CHECKOUT</strong></td>
<td></td>
</tr>
<tr>
<td>PayPal Express Checkout</td>
<td>During checkout, the customer is redirected to the secure PayPal site to complete the payment information.</td>
</tr>
<tr>
<td><strong>ALL-IN-ONE SOLUTIONS</strong></td>
<td></td>
</tr>
<tr>
<td>PayPal Payments Advanced (Includes Express Checkout)</td>
<td>Allows you to accept payments with a PCI-compliant checkout that keeps customers on your site.</td>
</tr>
<tr>
<td>PayPal Payments Pro (Includes Express Checkout)</td>
<td></td>
</tr>
<tr>
<td>PayPal Website Payments Pro (Outside US)</td>
<td>Allows you to accept payments with a completely customizable checkout.</td>
</tr>
<tr>
<td>PayPal Payments Standard (Includes Express Checkout)</td>
<td></td>
</tr>
<tr>
<td>PayPal Website Payments Standard (Outside US)</td>
<td>Adds PayPal as an additional payment method to your checkout page.</td>
</tr>
<tr>
<td><strong>PAYMENT GATEWAYS</strong></td>
<td></td>
</tr>
<tr>
<td>PayPal Payflow Pro (Includes Express Checkout)</td>
<td>Connects your merchant account with a fully customizable gateway that lets customers pay without leaving your site.</td>
</tr>
<tr>
<td>PayPal Payflow Link (Includes Express Checkout)</td>
<td>Connects your merchant account with a PCI-compliant gateway that lets customers pay without leaving your site.</td>
</tr>
<tr>
<td><strong>OTHER PAYPAL SOLUTIONS</strong></td>
<td></td>
</tr>
<tr>
<td>PayPal Integral Evolution</td>
<td></td>
</tr>
<tr>
<td>PayPal Pasarela Integral</td>
<td></td>
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<tr>
<td>PayPal Pro</td>
<td></td>
</tr>
<tr>
<td>PayPal Website Payments Plus</td>
<td></td>
</tr>
<tr>
<td>PayPal Website Payments Pro Hosted Solution</td>
<td></td>
</tr>
<tr>
<td>PayPal Payments Pro Hosted Solution (includes Express Checkout)</td>
<td></td>
</tr>
</tbody>
</table>
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 over time, 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. 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

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.

**To enable PayPal Credit:**

Give your customers access to financing with PayPal Credit, at no additional cost to you. You get paid up front, even though customers can pay over time. A pre-integrated payment button lets customers pay quickly with PayPal Credit.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. For any of the following **Recommended Solutions**, tap **Configure**.
   - PayPal Express Checkout
   - Any PayPal All-In-One Solution with PayPal Express Checkout
4. Complete the **Required PayPal Settings**. Then, expand **Advertise PayPal Credit**.
5. Set **Enable PayPal Credit** to “Yes”.
6. Tap **Save Config**.
Enable PayPal Credit

To enable PayPal Credit banners:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. For any of the following **Recommended Solutions**, tap **Configure**.
   - PayPal Express Checkout
   - Any PayPal All-In-One Solution with PayPal Express Checkout
4. Expand the **Required PayPal Settings** section. Then, expand the **Advertise PayPal Credit** section.

5. Click the **Get Publisher ID from PayPal** button and follow the directions to get your account information. Then, enter your **Publisher ID**.
6. 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

7. Repeat the previous step for each of the following sections:
   - Catalog Category Page
   - Catalog Product Page
   - Checkout Cart Page

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

These examples do not represent the actual size of the banners, but show their relative shape and proportion.

1 As reported in Neilsen’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 284,890 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

<table>
<thead>
<tr>
<th>ACTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review</td>
<td>If you set the filter action to “Review,” the suspected order receives the status &quot;Payment Review&quot; 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. 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.</td>
</tr>
<tr>
<td>Deny</td>
<td>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. 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.</td>
</tr>
<tr>
<td>Flag</td>
<td>If you set the filter action to “Flag”, the suspected order gets the status &quot;Processing&quot; when it is placed. The corresponding transaction is marked with a “flag” in the list of the merchant account transactions.</td>
</tr>
</tbody>
</table>
# PayPal by Country

## PayPal Payment Solutions

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>PAYPAL PAYMENT SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>PayPal Website Payments Standard</td>
</tr>
<tr>
<td></td>
<td><a href="#">PayPal Payflow Pro</a></td>
</tr>
<tr>
<td></td>
<td>PayPal Website Payments Pro Hosted Solution</td>
</tr>
<tr>
<td></td>
<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>Canada</td>
<td>PayPal Website Payments Standard</td>
</tr>
<tr>
<td></td>
<td><a href="#">PayPal Payflow Pro</a></td>
</tr>
<tr>
<td></td>
<td><a href="#">PayPal Payflow Link</a> (includes Express Checkout)</td>
</tr>
<tr>
<td></td>
<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>France</td>
<td>PayPal Integral Evolution</td>
</tr>
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<td>PayPal Website Payments Standard</td>
</tr>
<tr>
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<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>Germany</td>
<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>Hong Kong SAR China</td>
<td>PayPal Website Payments Pro Hosted Solution</td>
</tr>
<tr>
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<td>PayPal Website Payments Standard</td>
</tr>
<tr>
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<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>Italy</td>
<td>PayPal Pro</td>
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</tr>
<tr>
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<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>Japan</td>
<td>PayPal Website Payments Plus</td>
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</tr>
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</tr>
<tr>
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<td>PayPal Website Payments Standard</td>
</tr>
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<td><a href="#">PayPal Express Checkout</a></td>
</tr>
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<td>Spain</td>
<td>PayPal Pasarela Integral</td>
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<td>PayPal Website Payments Standard</td>
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<tr>
<td></td>
<td><a href="#">PayPal Express Checkout</a></td>
</tr>
<tr>
<td>COUNTRY</td>
<td>PAYPAL PAYMENT SOLUTION</td>
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<tr>
<td>----------------------</td>
<td>--------------------------------------------------------------</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>PayPal Payments Pro Hosted Solution (includes Express Checkout)</td>
</tr>
<tr>
<td></td>
<td>PayPal Payments Standard</td>
</tr>
<tr>
<td></td>
<td>PayPal Express Checkout</td>
</tr>
<tr>
<td>United States</td>
<td>PayPal Payments Advanced (Includes Express Checkout)</td>
</tr>
<tr>
<td></td>
<td>PayPal Payments Pro (Includes Express Checkout)</td>
</tr>
<tr>
<td></td>
<td>PayPal Payments Standard+</td>
</tr>
<tr>
<td></td>
<td>PayPal Payflow Pro (Includes Express Checkout)</td>
</tr>
<tr>
<td></td>
<td>PayPal Payflow Link (Includes Express Checkout)</td>
</tr>
<tr>
<td></td>
<td>PayPal Express Checkout</td>
</tr>
</tbody>
</table>

**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 80:
Other Payment Methods

Magento for B2B Commerce supports numerous payment solutions 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.

- Klarna
- Amazon Pay
- Authorize.Net Direct Post (Deprecated)
- Authorize.Net
- CyberSource (Deprecated)
- eWAY (Deprecated)
- Worldpay
Klarna

Klarna lets your customers choose how they want to pay, and supports the purchase with buyer protection and excellent customer service.

Changes In the Latest Release

New Features

- Klarna now supports B2B payments for select merchants in Sweden and Germany. To use this feature, B2B payments must be enabled in your Klarna account. To learn more, contact Klarna Merchant Support.
- Klarna now supports PayBright with extended payment options for Canadian merchants.
- Klarna has a new logo and payment badge that features the company name with a pink background.

Klarna Payment Methods

- Klarna. Installments - Gives your customers an interest-free alternative to credit with four installments.
- Klarna. Pay in 30 days - Gives your customers an extra 30 days to pay.
- Klarna. Financing - Gives your customers the option to pay over 3 to 36 months.

Klarna Solutions

- Klarna. Checkout - A complete online checkout solution and smooth shopping experience that increases sales and customer loyalty.
- Klarna. Instore - An easy way to offer in-store financing that feels more like shopping online.
- Klarna. Instant Shopping - A quick-pay payment button that allows users to instantly shop on social with your product page or any other page you want.
Klarna Customer Experience

Klarna appears as a payment method during checkout, if enabled in the configuration. If data sharing is used, Klarna can instantly prequalify the customer, and present the available solutions.

Pay over time with Klarna

To pay with Klarna:

The payment solution presented might be one of the following:

Pay over time

1. Select Slice it. Pay over time with Klarna.

2. Do one of the following:
   - Add the purchase to your Klarna account.
   - Apply for Klarna credit, and receive an instant decision.
3. After the terms of the credit are approved, tap **Place Order**.

**Pay later**

1. Select **Pay later**.

The terms appear below. In this example, no sign-up is needed, and the customer can pay in 14 days.

   **Pay Later**

2. To pay later with Klarna according to the terms specified, tap **Place Order**.
Setting Up Klarna

To offer your customers the benefit of paying with Klarna, you must first sign up for a Klarna account and gain access to the Klarna Merchant Portal. Then, complete the Klarna configuration from the Admin of your Magento store.

**Important:** Klarna does not support currency switches to display multiple currencies in one website. Magento uses a base currency and tax configured at the website level (not store view) to avoid rounding and mismatch issues. To support multiple currencies, create a website per currency, using different URLs configured at the Magento website level (not store view).

### Step 1: Set Up Your Klarna Account

1. Do the following from the Admin of your Magento installation:
   a. In the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
   b. In the panel on the left under **Sales**, choose **Payment Methods**.
   c. In the **Klarna** section, tap **Configure**.
   d. Under **Klarna Payments**, click the link to visit the Klarna Merchant Onboarding page.
2. Do one of the following:
   - To create a new account, complete the Onboarding form to create a Klarna merchant account. Then, tap **Create account**.
   - If you already have an account, click **Log in here**.

3. To generate your API Credentials for Klarna’s Playground environment, do one of the following:
   - Tap the **Settings** icon.
   - In the main menu, choose **Settings**.

Then, do the following:
(a) On the **API Credentials** tab, tap **Generate new API credentials**.

(b) **Copy** your credentials to a text editor like Notepad. You will need them later to complete the Magento configuration.

4. If necessary, sign in to your Klarna account. Then on the **Store Settings** tab, do the following:

(a) Take note of your **Store ID** in the upper-left corner of the page. Copy and paste the value into a text editor like Notepad, along with your API credentials.

(b) Complete the following store information:

- Store name
- Homepage URL
- Customer Support Email
- Customer Support Phone

(c) In the upper-right corner, click the **Menu** icon (```). Then, choose **Branding**.
If your logo and icon files are ready, follow the onscreen instructions to upload them to the Klarna portal. If the files aren’t ready, you can complete this step later.

**Icon**
Your icon appears in the Klarna app.
Recommended size: 180 x 180 pixels
Aspect ratio 1:1
Supported File types: PNG or JPG (JPEG)

**Logo**
Your logo appears in communications and statements sent to customers. For best results save your logo as a PNG file with a transparent background.
Supported File types: PNG or JPG (JPEG)

**Feature Image**
Your feature image appears in the Klarna app.
Recommended size: At least 1340 x 1000 pixels.
Aspect ratio: 1.34:1
Supported File types: PNG or JPG (JPEG)
Step 2: Configure Magento

1. Open another browser tab, and log in to the Admin of your Magento store.

2. On the Admin sidebar, choose Stores. Then under Settings, choose Configuration.

3. In the upper-left corner, choose the Store View where the configuration applies. If your installation has only one view, accept the “Default Config” setting.

4. In the panel on the left, under Sales, choose Payment Methods. Under Other Payment Methods, expand the Klarna section. Then, tap Configure.

5. Expand the Klarna API section. Then, do the following:

   a. Set API Version to one of the following:
      - Klarna Payments (Europe)
        Supported countries: AT, DE, DK, UK, FI, NL, NO, SE
      - Klarna Payments (North America)

   b. In the Merchant ID/EID field, enter the Store ID from your Klarna account.

   c. Enter the Password/Shared secret from your Klarna account.

   d. To use the Klarna Playground for test transactions, set Test Mode to “Yes.”

   e. To generate a record of interactions while testing the integration, set Debug Mode to “Yes.”

Turn Debug Mode off before going live with Klarna in your production store.
6. Expand the **Klarna Payments** section. then, do the following:

   a. Set **Enable this Solution** to “Yes.”

   b. 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.

   c. (U.S. Only) If you want Klarna to prepare set of personalized credit options for each customer, set **Data sharing** to “Yes.”

   d. Enter a **Sort Order** number to determine the position of Klarna in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

7. If you want to stop here, tap **Save Config**.
8. When prompted, click the Cache Management link at the top of the page. Then, refresh all invalid caches.

**Step 3: Complete the Design Settings** (Optional)

You can complete the Klarna Payment Design Settings now, or at a later time. You might use a color picker to experiment with different colors for each element to match your store's theme. The results might vary, depending on theme.

Enter the hexadecimal value of the color that you want to use for each element.

- Details color
- Button color
- Button text color
- Checkbox color
- Checkbox check mark color
- Header color
- Link color
- Border color
- Selected border color
- Text color
- Secondary text color
- Border radius
9. When complete, tap **Save Config**. Then when prompted, click the **Cache Management** link at the top of the page to refresh all invalid caches.
Managing Your Account

The Klarna Merchant Portal makes it easy to manage orders, view transactions, and generate reconciliation reports. You can also manage your Klarna account settings, and add new users to your account.

Orders are captured with shipping details from the Magento Admin. Klarna also supports post order processing for events such as cancellations, refunds, and fraud.

To manage orders:

1. Do one of the following:
   - In the main menu, choose **Orders**.
   - On the Klarna dashboard, choose **Orders**.

2. Follow the instructions to do any of the following:

**Find an Order**

1. To filter the list, set **Status** to one of the following:
   - Unacknowledged
   - Uncaptured
   - Captured
   - Cancelled
2. To find a specific order, enter any of the following into the **Search for order** box:
   - Customer name and email
   - Merchant reference
   - Klarna reference
   - Order ID

3. To view the order detail, click the linked **Klarna reference number** in the first column. The amount of detail that is included in the report depends on your configuration. For example, if **Fixed Product Taxes** are enabled and applicable to the order, the amount appears in the product line item.
Export Orders

1. Tap **Export all (CSV)**.

2. Look for the export file in your browser’s downloads list. Then, open the file in a spreadsheet application.

---

**Exported Orders in Excel**

---

**Post Processing Events**

<table>
<thead>
<tr>
<th>EVENT</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled Order</td>
<td>Sends cancel to Klarna.</td>
</tr>
<tr>
<td>Full/Partial Capture</td>
<td>Sends capture to Klarna.</td>
</tr>
<tr>
<td>Full/Partial Refund</td>
<td>Sends refund to Klarna.</td>
</tr>
<tr>
<td>Deny</td>
<td>If an approved order is later identified as fraudulent, Klarna requests the merchant to try to prevent the order from being delivered. In addition, Klarna attempts to cancel the order automatically by sending notification to Magento.</td>
</tr>
</tbody>
</table>
Amazon Pay

Amazon Pay and Login with Amazon offer your customers a secure and convenient way to pay that is easy to set up, and that helps to increase conversions and sales. Customers who log in to your store with their Amazon credentials can speed through checkout using the payment and shipping information that is already stored in their Amazon accounts.

Shop Safely

Customer purchases are protected by Amazon’s A-to-z Guarantee. Customer password and payment information is never shared.

Speed Through Checkout

During checkout, shipping and payment information is read directly from the customer’s Amazon Payments account.

Log in with Amazon

Customers can use their Amazon password to log in to their account with your store.
Amazon Pay Customer Experience

Customers can speed through checkout by using the payment methods and shipping addresses that are available in their Amazon accounts. Your store can be configured to show the Amazon Pay button on product pages, and in the cart sidebar, shopping cart, and during checkout.

To place an order with Amazon Pay:

1. To begin the checkout process, tap Amazon Pay. Then when prompted, enter your Amazon credentials.

2. Choose the shipping address from your Amazon Address Book.

Amazon Pay on Product Page

Shipping Addresses
The pagination indicator shows how many addresses are available. However, only four can be viewed at a time.

- Click the arrow (↑ ) to view all available options.
- To add a new address to the Address Book, click **Add new**.
- If you prefer, click **Return to standard checkout**.

![Amazon Pay Address Book](image)

3. Choose the **Shipping Method** that you want to use for the order. Then, tap **Next**.
4. During the **Review & Payments** checkout step, the standard Magento payment methods are replaced with the payment methods that are available in your Amazon account.

![Review & Payments](image)

The pagination indicator shows how many payment methods are available. However, only four can be viewed at a time.

- Click the arrow (↑ ) to view all available options.
- Choose the **Payment Method** that you want to use for the purchase.
5. Enter a Discount Code, if applicable.

6. Review the order. Then, tap **Place Order**.
Setting Up Amazon Pay

Amazon Pay and Login with Amazon work together to create a great buyer experience. To learn more, see the Amazon Pay and Login with Amazon documentation for Magento 2 or watch the Amazon Pay University video on Integrating Amazon Pay with Magento 2.

To set up Amazon Pay:

1. On the Admin menu, choose Stores. Then under Settings, choose Configuration. Then, do the following:
   a. In the upper-right corner, set the Store View chooser to establish where the Amazon Pay configuration applies.
   b. In the panel on the left under Sales, choose Payment Methods. Then under Other Payment Methods, expand the Amazon Pay section.

2. Under Amazon Pay, tap Register or Connect an Amazon Pay Account.
   Do not use your personal Amazon account for Amazon Pay.
a. If you do not yet have an Amazon merchant account, choose **Create a new signin**, and tap **Select**. Then, follow the onscreen instructions to create a new account.

Create Amazon Pay Account

b. If you already have an Amazon merchant account, choose **Use existing Amazon signin**, and tap **Select**. Then, complete the following sections:

**Credentials**

1. Expand the **Credentials** section. Your credentials are transferred automatically from your Amazon Pay account to the Magento Admin. Your credentials can also be found in Amazon Seller Central in both Production and Sandbox modes.

To use test credentials from the Amazon Pay Sandbox, do the following:

a. Get your **Test Credentials** for the Amazon Pay Sandbox.

b. In the Magento Amazon Pay configuration under Credentials, mark the **Test Credentials** checkbox.

c. Enter the following credentials that you copied from the **Amazon Pay Sandbox** on Amazon Seller Central:
Merchant Id
Access Key Id
Secret Access Key
Client ID
Client Secret
d. Set Sandbox to “Yes.”

When you are through testing and ready to go live with Amazon Pay, return to the configuration and clear the Test Credentials checkbox. Then, set Sandbox to “No” and tap Save Config.

2. Verify the Payment Region for the store.

3. When complete, tap Save Config.

Look for the message, “Your Amazon configuration is valid” at the top of the Configuration page.
• If your credentials are valid, continue with the configuration.
• Otherwise, correct your credentials, and try again.
Options

1. Expand the Options section.
2. Set Enable Amazon Pay to “Yes.”
3. Set Enable Login with Amazon to “Yes.”
4. Set Payment Action to one of the following:
   - Charge on Shipment (Default) Amazon receives a capture request and charges the customer when an invoice is created in Magento.
   - Charge on Order Amazon creates the invoice and charges the customer when the order is placed.
5. Set Authorization Mode to one of the following to determine the method that is used to transmit authorization data.
   - Immediate (Default) Makes the disposition of an authorization available within a couple of seconds.
   - Automatic (Recommended) Uses synchronous authorization if possible, and switches to asynchronous processing as needed, for some declines. The change in processing modes is transparent to the user. The status of sales order is “Pending” while the disposition of authorization is outstanding.
6. Set Update Mechanism to one of the following:
   - Data Polling via Cron job (Default) Uses the standard Magento notification process that is scheduled by Cron job.
   - Instant Payment Notifications (IPN) Sends notifications to the Instant Payment Notification URL.
Options

- **Enable Amazon Pay** [store view]: No
- **Enable Login with Amazon** [store view]: No
  
  Note that if Login with Amazon is disabled and Guest Checkout is disabled, the customer will not be able to use Amazon Pay.

- **Payment Action** [store view]: Charge on Shipment
- **Authorization Mode** [store view]: Immediate
- **Update Mechanism** [global]: Data Polling via Cron Job

*Options*
Advanced Settings

1. Expand the **Frontend** section. Then, do the following as applicable:
   a. (Optional) If your store is available in multiple languages, you can display the text on the Amazon Pay button in a different language for each store view. To override the default display language for the current store view, enter one of the following language parameters in the **Button Display Language** field:

   - en-GB  English (Great Britain)
   - de-DE  German (Germany)
   - fr-FR  French (France)
   - it-IT  Italian (Italy)
   - sp-SP  Spanish (Spain)

   To learn more, see Language in the Amazon Pay Integration Guide.

   b. Set **Button Color** to one of the following:

      - Gold
      - Light Gray
      - Dark Gray

      To learn more, see the Merchant Tools page on the Amazon Pay website.

   c. Set **Button Size** to one of the following:

      - Small
      - Medium
      - Large
      - Extra Large

   d. Choose “Yes” for each feature that you want to enable for the current store view:

      - Login with Amazon available in authentication popup
      - Amazon Pay button on Product Page
      - Amazon Pay button in minicart
      - Display Amazon Pay Method
Frontend

2. Expand the **Sales Options** section. Then, enter the **Store Name**.

Sales Options

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

4. In the message at the top of the page to refresh cache types, click **Cache Management**. Then, do the following:

   a. Mark the checkbox of each invalid cache.

   b. With the control set to “Refresh,” tap **Submit**.
Using Amazon Seller Central

Use the chooser at the top of the page to change the view of Amazon Seller Central. The options include all the Amazon resources that are associated with your account. Each view is a separate dashboard with specific resources for the view.

Amazon Seller Central (Production View)

To change views:
Set the chooser to the view that you want to see. The following views relate to the Magento integration of Amazon Pay:

- Amazon Pay (Sandbox View)
- Amazon Pay (Production View)
- Login with Amazon

To find your credentials:
To run test transactions from the Amazon Pay Sandbox, you must copy the keys from your account on Amazon Seller Central. Then, enter the keys into the Magento Amazon Pay configuration. Your credentials can be found in both the Production and Sandbox views of Amazon Seller Central.

1. Log in to your seller account on **Amazon Seller Central**.
2. Set the chooser to one of the following:
   - Amazon Pay (Production View)
   - Amazon Pay (Sandbox View)
3. On the main menu, under **Integration**, choose **MWS Access Keys**. Then, do the following:
a. In the page header, tap **Copy your keys.**

**Copy Your Keys**

b. Your keys are formatted as a JSON string, with each item enclosed in double quotes. **Copy** your keys, and paste them into Notepad. Then, **Close** the box. You will need them to complete the Amazon Pay configuration for Sandbox Mode in the Magento Admin.

Your keys are confidential, and should not be shared.
Managing Amazon Pay Transactions

All purchases made in your store and processed by Amazon Pay can be viewed from the Amazon Pay website. If you receive a request for a refund, follow the normal Magento process to issue a credit memo and make a refund. The Credit Memo button appears after a sales order is invoiced.

To issue a refund:

1. On the Admin sidebar, choose Sales. Then on the menu, choose Orders.
2. Find the completed order to be refunded. Then in the Action column, click View.
3. In the button bar, tap Credit Memo.
4. Scroll down to the bottom of the page, and confirm the Refund Totals.
5. When complete, tap Refund Online.

For more detailed instructions, see: Issuing a Credit Memo.

To view Amazon Pay activity:

2. In the header at the Sign In prompt, choose Merchants. Then, do the following:
3. When prompted, do the following:
a. Enter your **email address** or **mobile number**.

b. Enter your **password**.

c. Tap **Sign in**.

4. To view orders from a specific region, choose the region from the **Account Activity** control.

5. To find an order, click **Can't find an order?** Then, choose the Amazon service that processed the order.
Amazon Pay Resources

Amazon Pay has a wealth of information and tools to help you manage your Amazon Pay account.

To access Amazon’s online help and documentation, you will need the login credentials for your Amazon Seller Central account.

For more information, watch the Amazon Pay University video on Integrating Amazon Pay with Magento 2.

To find help:

1. Log in to your Amazon seller account on Seller Central.
2. In the upper-right corner, click Help.

Amazon Seller Central
3. In the header, set the integration chooser to “Amazon Pay (Sandbox View).”

- You’ll find additional guides for developers in the right sidebar under Documentation, and additional resources under Help and FAQ.

Getting Started Guide
Authorize.Net Direct Post (Deprecated)

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 (Deprecated) can be used with orders created from the Admin as well as from the store.

**Deprecation Notice:** Authorize.Net has deprecated the Authorize.net Direct Post (Deprecated) payment method. If you use this method, you must update the MD5 Hash key with a new Signature key. The Authorize.Net payment method must be set up as the replacement payment method. Refer to Authorize.Net for more information.

**Customer Workflow**

1. **Customer chooses payment method.** During checkout, the customer chooses Authorize.Net Direct Post (Deprecated) 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.

**Setting Up Authorize.net Direct Post (Deprecated)**

**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 **Authorize.Net Direct Post (Deprecated)** 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 (Deprecated) payment method during checkout.

![Authorize.net Direct Post](image)

Enable Authorize.Net Direct Post (Deprecated)

**Step 2: Enter Your Credentials**

1. Enter the following credentials from your Authorize.Net account:
   - API Login ID
   - Transaction Key

2. 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](#).

3. Set **New Order Status** to one of the following:
   - Processed Ogone Payment
   - Processing

4. 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.

5. Enter the **Gateway URL** that establishes the connect to the Authorize.Net server. The default value is:
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.

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.”
**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.

**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.)

5. When complete, tap **Save Config.**
Authorize.Net

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, do one of the following:

- (Recommended) Install and configure the official Authorize.Net payment integration extension from Magento Marketplace.
- Enable and configure the Authorize.Net payment method in the Magento configuration.

Both of these integrations support 3D Secure 2.0 verification through CardinalCommerce and other third-party services.

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 can be used with orders created from the Admin as well as from the store.

Customer Workflow

1. Customer chooses payment method. During checkout, the customer chooses Authorize.Net 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.

Setting Up Authorize.Net

Step 1: Complete 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.
3. Expand the Authorize.net section.
4. Enter a unique **Title** to identify the Authorize.Net payment method during checkout.

5. In the **Environment** field, select Sandbox or Production. This setting is based on your Authorize.Net merchant account type.

6. 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.

7. Enter the following values from your Authorize.Net merchant account, They can be found at Account > Settings > Security Settings > API Credentials & Keys.
   - **Transaction Key**
   - **Public Client Key**
   - **Signature Key**

   If you have previously generated a transaction key, enter your current transaction key value. If you don't know your existing transaction key or have never established one, you can generate a new key from your Authorize.Net merchant account. If generating a new key to replace an existing key, make sure to update any existing applications that use the old transaction key.

8. Skip the **Merchant MD5 (deprecated)** field. Authorize.Net does not use this data field.

**Step 2: Enable Authorize.Net**

When all of the Basic Authorize.Net settings are completed, set the **Enabled** field to “Yes”.

**Step 3: Complete Advanced Settings**

1. To set the default status for all new orders, set **New Order Status** to one of the following:
   - Processing
   - Suspected Fraud

2. Verify that **Accepted Currency** is set to “US Dollar”.

3. To save messages transmitted between your store and Authorize.Net, set **Debug** to “Yes”.
4. If you want Authorize.Net to send an order confirmation notification to the customer, set **Email Customer** to “Yes”.

Merchant email settings can be configured in your Authorize.Net merchant account at Account > User Profile > Edit Profile Information.

5. To require customers to enter a card verification value (CVV), accept the default value “Yes” for **Enable Credit Card Verification Field**.

6. In the **Credit Card Types** list, select each credit card that is accepted in your store.

7. 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.
```

8. Enter the **Minimum Order Total** and **Maximum Order Total** for store transactions. To qualify, the order total must exactly match the minimum or maximum threshold, or fall somewhere in between.

9. Enter a **Sort Order** number to determine the position of Authorize.Net in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

10. To save your configuration settings, tap **Save Config** before exiting.

**Step 4: Set Up 3-D Secure with CardinalCommerce** (Optional)

CardinalCommerce provides a 3-D Secure Version 2.0 solution that increases approvals, and reduces fraud and false declines. In addition, CardinalCommerce Consumer Authentication (CCA) fulfills the Payment Services Directive SCA requirements for merchants doing business in the European economic area. To add 3-D Secure capabilities to your Authorize.Net configuration, do the following:

1. Go to **CardinalCommerce** and sign up for a CardinalCommerce Consumer Authentication merchant account. You will need the following credentials from your CardinalCommerce account to complete the Magento configuration:

   - Org Unit ID
   - API Key
   - API Identifier

2. Return to the Magento Admin. Then on the Admin sidebar, go to **Stores > Settings > Configuration**.
3. In the panel on the left under **Sales**, choose **3D Secure**. Then in the CardinalCommerce section, do the following:

![CardinalCommerce](image)

- **CardinalCommerce**
  - Set **Enable for Authorize.Net** to “Yes.”
  - To choose the environment, do one of the following:
    - If Authorize.Net is currently running in test mode, accept the default “Sandbox”.
    - To set up CardinalCommerce for Authorize.Net for a live store, choose “Production”.
  - Enter the following credentials from your CardinalCommerce merchant account:
    - Org Unit ID
    - API Key
    - API Identifier
  - If you want the system to save a log file of interactions between your store and CardinalCommerce, set **Debug** to “Yes”.

4. When compete, tap **Save Config** in the upper-right corner. Then in the message at the top of the workspace, click **Cache Management**, and refresh all invalid caches.
CyberSource

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, install and configure the official CyberSource payment integration extension from Magento Marketplace. 3D Secure 2.0 verification is available through CardinalCommerce.

CyberSource was one of the pioneers in the early online payment industry, and later acquired Authorize.net. Today, CyberSource 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 Middle East, Africa, and the United States.

CyberSource supports shipments to multiple addresses as part of the checkout flow. The order is duplicated for each address that the customer wants to ship to.

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.

Step 3: Enter Your CyberSource Credentials
Enter the following credentials from your CyberSource account:
- Merchant ID
- Profile ID
- Transaction Key
- Access Key
- Secret Key

![Image of CyberSource credentials form]

**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.
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.
eWAY

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, install and configure the official eWAY payment integration extension from Magento Marketplace.

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]

   - Set Enabled to “Yes.”
   - 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.
   - 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

![eWAY Credentials]

**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.

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.

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

Payment Services Directive Requirements:
As of September 14, 2019, European banks might decline payments that do not meet PSD2 requirements. To comply with PSD2, contact your Worldpay service provider and ask for their recommendation.

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.

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
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.

---

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.”
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.

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

**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.

2. When complete, tap **Save Config.**
CHAPTER 81: 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 for B2B 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 Configuration](image)

*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 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.

   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 for B2B 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.

<table>
<thead>
<tr>
<th>Cash On Delivery Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enabled</strong></td>
</tr>
<tr>
<td><strong>Title</strong></td>
</tr>
<tr>
<td><strong>New Order Status</strong></td>
</tr>
<tr>
<td><strong>Payment from Applicable Countries</strong></td>
</tr>
<tr>
<td><strong>Payment from Specific Countries</strong></td>
</tr>
<tr>
<td>Afghanistan</td>
</tr>
<tr>
<td>Andorra</td>
</tr>
<tr>
<td>Algeria</td>
</tr>
<tr>
<td>American Samoa</td>
</tr>
<tr>
<td>Andorra</td>
</tr>
<tr>
<td>Angola</td>
</tr>
<tr>
<td>Anguilla</td>
</tr>
<tr>
<td>Antarctica</td>
</tr>
<tr>
<td>Antigua and Barbuda</td>
</tr>
<tr>
<td><strong>Instructions</strong></td>
</tr>
<tr>
<td><strong>Minimum Order Total</strong></td>
</tr>
<tr>
<td><strong>Maximum Order Total</strong></td>
</tr>
<tr>
<td><strong>Sort Order</strong></td>
</tr>
</tbody>
</table>

*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 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.
   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.
Payment on Account

Payment on Account is an offline payment method that allows companies to make purchases up to the credit limit that is specified in their profile. Payment on Account can be enabled globally, or per company, and appears during checkout only if enabled. When Payment on Account is used as a payment method, a message appears at the top of the order that indicates the status of the account. To configure Payment on Account for a specific company, see: Updating a Company Profile.

To configure payment on account:

1. On the Admin sidebar, tap Stores. Then under Settings, choose Configuration.
2. In the panel on the left, choose Payment Methods.
3. Expand the Payment on Account section. Then, do the following:
   a. After the Enabled field, clear the Use system value checkbox. Then, set Enabled to “Yes”.
   b. If you want to change the default title, “Payment on Account,” clear the Use system value checkbox. Then, enter the title that you want to appear during checkout.
   c. By default New Order Status is set to "Pending" until receipt of payment is confirmed. To change the default status, clear the Use system value checkbox. Then, choose one of the following settings:
- Processing
- Suspected Fraud

d. Set **Payment from Applicable Countries** to one of the following:

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Allowed Countries</td>
<td>Companies from all countries specified in your store configuration can use Payment on Account.</td>
</tr>
<tr>
<td>Specific Countries</td>
<td>After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where companies can use Payment on Account.</td>
</tr>
</tbody>
</table>

e. 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.

f. Enter a **Sort Order** number to determine the position of Payment on Account 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.**
Bank Transfer

Magento for B2B 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
  - [website] No
  - [store view] Use system value

- Title
  - Bank Transfer Payment

- New Order Status
  - Pending
  - [website] Use system value

- Payment from Applicable Countries
  - All Allowed Countries
  - [website] Use system value

- Payment from Specific Countries
  - Afghanistan
  - Åland 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]
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 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.
   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.
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 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.

   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.
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.
   
<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>The order is waiting for authorization.</td>
</tr>
<tr>
<td>Processing</td>
<td>Payment has been authorized, and the transaction is being processed.</td>
</tr>
</tbody>
</table>
   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:

<table>
<thead>
<tr>
<th>Countries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Allowed Countries</td>
<td>Customers from all countries specified in your store configuration can use this payment method.</td>
</tr>
<tr>
<td>Specific Countries</td>
<td>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.</td>
</tr>
</tbody>
</table>

   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.
CHAPTER 82:

Fraud Protection

Fraud protection services and filters examine submitted orders before the transaction is processed to detect fraudulent orders and protect you from the expense of chargebacks. Magento supports the following fraud protection solutions:

- PayPal Fraud Management Filter
- Signifyd Guaranteed Fraud Protection
- Fraud Protection Solutions on Magento Marketplace
Signifyd Guaranteed Fraud Protection

Signifyd Guaranteed Fraud Protection automates your order review process so you can accept more orders and maximize revenue without chargeback losses. Signifyd automatically reviews orders for fraud, and indicates which orders to ship, and which to reject. The results of the Signifyd Guarantee Decision appear as a column in the Orders grid.

Signifyd’s Guaranteed Fraud Protection protects every approved order with a financial guarantee against fraudulent chargebacks, so you can grow your business without fear of fraud.

Step 1: Sign Up for a Signifyd Account

1. Complete Signifyd’s Guaranteed Fraud Protection form to contact their Sales team.
2. Follow their one-click installation instructions to install Signifyd on your server.
3. Complete the Signifyd configuration for your Magento installation.

Step 2: Configure Your Magento Store

1. On the Admin sidebar, tap Stores. Then under Settings, choose Configuration.
2. In the panel on the left under Sales, choose Fraud Protection.
3. Under Signifyd, expand the Configuration section. Then, do the following:
Signifyd Configuration

a. Set **Enable this Solution** to “Yes”.

b. From the **Settings** page of your Signifyd console, enter the **API Key**.

c. Do not change the default **API URL**, unless instructed to do so.

d. If you want Magento to keep a log of all interactions between your store and Signifyd, set **Debug** to “Yes”.

e. The **Webhook URL** is the location of the handler that synchronizes Signifyd’s guarantee decisions with your store, and cannot be changed from the Admin.

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 83: 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
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.

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**.

![Multiaddress Shipping Options](image-url)
Shipping Policy

A shipping policy should explain your company's business rules and guidelines for shipments. For example, if you have price rules that trigger free shipping, you can explain the terms in your shipping policy.

To display your shipping policy during checkout, complete the Shipping Policy Parameters in the configuration. The text appears when customers click the “See our shipping policy” link during checkout.
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.”
   b. Either paste or enter your Shipping Policy into the text box.

   If you use a word processor to compose the text, make sure to save the document as a .txt file to remove any control characters from the text. Then, copy and paste the text into the Shipping Policy text box.

4. When complete, tap Save Config.
CHAPTER 84:

Basic Shipping Methods

Magento for B2B 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.

---

**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 *countries* 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. When enabled, Flat Rate appears as an option during checkout. Because no specific carrier is specified, you can use a carrier of your choice.

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 countries 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.

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 country 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**.
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.

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.
5. When complete, save the `tablerates.csv` file.

Step 3: Import the Table Rate Data

1. Return to the Table Rates section of your store configuration.
2. In the upper-left corner, set Store View to the website where this method will be used.
3. Next to the Import field, tap Choose File. Select your completed `tablerates.csv` file, and import the rates.

4. 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.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>REGION / STATE</th>
<th>ZIP / POSTAL CODE</th>
<th>ORDER SUBTOTAL (and above)</th>
<th>SHIPPING PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>HI</td>
<td>*</td>
<td>100</td>
<td>10</td>
</tr>
<tr>
<td>USA</td>
<td>HI</td>
<td>*</td>
<td>50</td>
<td>15</td>
</tr>
<tr>
<td>USA</td>
<td>HI</td>
<td>*</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>USA</td>
<td>AK</td>
<td>*</td>
<td>100</td>
<td>10</td>
</tr>
<tr>
<td>USA</td>
<td>AK</td>
<td>*</td>
<td>50</td>
<td>15</td>
</tr>
<tr>
<td>USA</td>
<td>AK</td>
<td>*</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>USA</td>
<td>*</td>
<td>*</td>
<td>100</td>
<td>5</td>
</tr>
<tr>
<td>USA</td>
<td>*</td>
<td>*</td>
<td>50</td>
<td>10</td>
</tr>
<tr>
<td>USA</td>
<td>*</td>
<td>*</td>
<td>0</td>
<td>15</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>REGION / STATE</th>
<th>ZIP / POSTAL CODE</th>
<th>WEIGHT (AND ABOVE)</th>
<th>SHIPPING PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUS</td>
<td>NT</td>
<td>*</td>
<td>9</td>
<td>39.95</td>
</tr>
<tr>
<td>AUS</td>
<td>NT</td>
<td>*</td>
<td>0</td>
<td>19.95</td>
</tr>
<tr>
<td>AUS</td>
<td>VIC</td>
<td>*</td>
<td>9</td>
<td>19.95</td>
</tr>
<tr>
<td>AUS</td>
<td>VIC</td>
<td>*</td>
<td>0</td>
<td>5.95</td>
</tr>
<tr>
<td>AUS</td>
<td>WA</td>
<td>*</td>
<td>9</td>
<td>39.95</td>
</tr>
<tr>
<td>AUS</td>
<td>WA</td>
<td>*</td>
<td>0</td>
<td>19.95</td>
</tr>
<tr>
<td>AUS</td>
<td>*</td>
<td>*</td>
<td>9</td>
<td>29.95</td>
</tr>
<tr>
<td>AUS</td>
<td>*</td>
<td>*</td>
<td>0</td>
<td>9.95</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>SETTING</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Condition</td>
<td>Price v. Destination</td>
</tr>
<tr>
<td>Method Name</td>
<td>Free Shipping</td>
</tr>
<tr>
<td>Ship to Applicable Countries</td>
<td>Specific Countries</td>
</tr>
<tr>
<td>Ship to Specific Countries</td>
<td>Select only United States</td>
</tr>
<tr>
<td>Show method if not applicable</td>
<td>No</td>
</tr>
</tbody>
</table>

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 determines 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 apply dimensional weight to some shipments. However, the manner in which dimensional weight pricing is applied varies from one carrier to another.

We recommend that you use Magento Shipping to calculate dimensional weight for all carriers. 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.
CHAPTER 85:

Magento Shipping

Magento Shipping is a multi-carrier shipping and fulfillment solution that combines intelligent automation capabilities, access to global carrier networks, and seamless integration with the Magento Admin. Our technology partner, Temando, provides the engine that powers this technology to deliver the following benefits:

- Provides accelerated revenue growth, and boost business efficiency.
- Manages multiple carriers from a single, integrated portal.
- Automatically checks for conflicts with extensions during setup to help avoid issues during development and testing.
- Simplifies ongoing maintenance by automatically including new carriers and features without having to update.

Changes In the Latest Release

Release 2.2.9

<table>
<thead>
<tr>
<th>Improvements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated supported countries and carriers</td>
</tr>
</tbody>
</table>

Supported Countries

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>CARRIER SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Australia</td>
<td>DHL Express, UPS, FedEx, Australia Post, Courier Please, StarTrack, Fastway</td>
</tr>
<tr>
<td>Austria</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Belgium</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Brazil</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Canada</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
</tbody>
</table>
### Supported Countries (cont.)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>CARRIER SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Denmark</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Finland</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>France</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Germany</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Greece</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>India</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Indonesia</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Ireland</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Italy</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Japan</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Netherlands</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>New Zealand</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Norway</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Philippines</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Portugal</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Russia</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Singapore</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>South Korea</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Spain</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Sweden</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Switzerland</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
<tr>
<td>Taiwan</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
</tbody>
</table>
 Supported Countries (cont.)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>CARRIER SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>DHL Express, UPS, FedEx, DPD UK, Hermes, UPS, DHL Parcel UK (UK Mail), Yodel, Panther, WnDirect, DX</td>
</tr>
<tr>
<td>United States</td>
<td>DHL Express, UPS, FedEx, USPS, Zenda</td>
</tr>
<tr>
<td>Vietnam</td>
<td>DHL Express, UPS, FedEx</td>
</tr>
</tbody>
</table>
Quick Look

Advanced Shipments

Magento Shipping is now available in seventeen countries, where you can create shipments with advanced features such as route and package information with dimensional weight, carrier quotes, international details with required export information, harmonization codes, shipping documents and labels, delivery instructions, and tracking information.

Locations

Configure multiple warehouses, distribution centers, retail stores, dropshippers, and third-party logistics. Allocate shipments to any supported fulfillment location.

Click & Collect

Offer the convenience of ordering online, with convenient customer pickup at a nearby location.

Dispatches

Book shipments with all carriers, and maintain a manifest of scheduled pickup with selected carriers.
Batches

Orders that are ready to ship with Magento Shipping can be booked together as multiple shipments, and processed as a batch.

Shipping Partners

Receive real-time rates from global carriers, and configure multiple accounts with the same carrier across multiple locations. Access prenegotiated rates for selected carriers, or create your own negotiated rates in selected markets.

Packaging

Manage package names and dimensions, and access carrier supplied packaging information.

Shipping Experience Rules

Automate the shipping and fulfillment processes based on a variety of factors, including inventory levels, proximity to destination, product type, shipping costs, ETA, carrier, packaging, and more.
Customer Experience

From the storefront, Magento Shipping options appear during the first step of the checkout process. Magento Shipping can be configured to show all options, or only the ones that apply to the order.

Shipping Methods

During checkout, the shopper identifies the address type as a residence or business, and specifies whether the carrier must obtain a signature, or can leave the package at the door. Finally, the shopper chooses the preferred shipping rate and carrier to be used for the order.

Click & Collect

If Click & Collect is enabled in the configuration, specific locations can be designated as Click & Collect fulfillment centers where the order can be sent for customer pick up.

During checkout, the “Pick up in store” option appears under Shipping Methods. When selected, a list of possible pickup locations appears, according to the logic of the related shipping experience rule. The customer chooses the most convenient location, and selects Click & Collect as the shipping method.

During Order Review, the Click & Collect location appears in the Ship To section, rather than the customer’s shipping address.

The customer is notified by email when the order is ready to collect at the designated location.
Collection Points

Collection points allow the customer to specify where the order is shipped. If enabled in the configuration, specific locations can be designated as fulfillment centers where the order is sent. The list of available countries is determined by those specified for collection points in the Magento Shipping configuration.

During checkout, the “Send to Collection Point” option appears under Shipping Methods. When selected, a list of possible pickup locations appears that are within a 20 km radius of the customer location, according to the logic of the related shipping experience rule. The list is sorted by the shortest distance, followed by description and opening hours, if available. Any locations with distances that cannot be calculated are listed alphabetically.

After choosing the location, the customer is prompted to choose the collection point as the shipping method.

During Order Review, the collection point location appears in the Ship To section, rather than the customer's shipping address.

Returns

When creating a return shipment, you can generate a list of shipping quotes, and choose the carrier that you want to use. The return label can be included in the original shipment.
Setting Up Magento Shipping

When enabled, Magento Shipping adds Dispatch and Batches options to the Magento Sales menu, a Shipping section to the Stores menu, and new sections of detailed information in each shipment. In the storefront, the selection of available Magento Shipping options appears during checkout.

Step 1: Sign Up for Magento Shipping

To access the Magento Shipping Portal, you must have both a Magento account and a Magento Shipping account. Your access to the Magento Shipping portal is based on your Magento account ID.

1. On the Admin sidebar, choose Stores. Then under Settings, choose Configuration.
2. In the panel on the left under Sales, choose Shipping Methods.
3. Expand the Magento Shipping section. Then, click Access the Magento Shipping Portal here.

4. When prompted, enter the Email and Password that you use to log in to your Magento account.
5. Follow the onscreen instructions to request a shipping account. When you receive email confirmation, follow the instructions to complete the process.

Step 2: Generate Your API Tokens

1. When you receive the confirmation email, open a tab to a separate browser window, and log in to your Magento Shipping account.

You should now have an open tab to your Magento configuration, and another to your Magento Shipping account. Information from your Magento Shipping account will later be pasted into the Magento Shipping configuration in the Admin.

2. Take a moment to read the Getting Started steps.
3. In the header, click the question mark (?) to hide the Welcome message and Getting Started steps.
4. The **Account Details** section shows your **API Endpoint** and **Account ID**. This information will later be copied and pasted into your Magento configuration.

![Account Details]

**Account Details**

5. A unique **API token** is used to identify the connection between your Magento website and your Magento Shipping account.

In the API Tokens section, tap `Generate Token` for the type of token that you need.

- **Production API Token** Generates the API token that is needed to use Magento Shipping in production mode.
- **Test API Token** Generates an API token that is needed to use Magento Shipping in test mode.

For a first-time setup, choose **Test API Token**. When you are ready to “go live” with Magento Shipping, you can use the Production API Token. In the next step you will paste the token into the Magento configuration.

![API Tokens]

**API Tokens**

**Step 3: Activate Magento Shipping**

Return to the browser tab with the **Magento Shipping** configuration, and do the following:

1. Set **Enabled** to “Yes.”

2. Enter the **Title** that you want to use for Magento Shipping.

3. By default, only API errors are logged. If you prefer to log all API communication, set **Enable API Logging** to “Yes.”
4. Paste the following credentials from your Magento Shipping account. You will need to return to the browser tab that is open to Magento Shipping, and copy and paste each into the Magento configuration.
   - API Endpoint
   - Account ID
   - API Token

   To run Magento Shipping in a testing environment, make sure to generate and copy the test token, rather than the production token.

5. If your store offers return merchandise authorization, set **Enabled for RMA** to “Yes.”

6. To give customers the option to have the shipment delivered to a designated drop point other than the standard “ship to” address, set **Enable Collection Points at Checkout** to “Yes.” Then, choose each country where such alternate collection points are to be available. (Hold down the Ctrl key and click each country.)

   ![Enable Collection Points at Checkout]

7. To allow customers to purchase online, but pick up the order at a designated location, set **Enable Click and Collect at Checkout** to “Yes.”

8. Complete the following settings as needed.
   a. Set **Ship to Applicable Countries** to one of the following:
      - All Allowed Countries: Customers from all countries specified in your store configuration can use Magento Shipping.
      - Specific Countries: Select each country in the list where Magento Shipping can be used.
   b. Set **Show Method if Not Applicable** to one of the following:
Yes  Always shows the Magento Shipping method, even when not applicable.

No  Shows the Magento Shipping method only when applicable.

c.  In the **Displayed Error Message** box, type the message to appear if Magento Shipping becomes unavailable.

d.  Enter a **Sort Order** number to determine the position of Magento Shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

9.  When complete, tap **Save Config**.
Step 4: Complete the Remaining Settings

1. The following configuration settings can be completed now, or at a later time.

Checkout View Settings

The Checkout View Settings determine the options that appear as add-on delivery options during checkout.

1. To complete the Checkout View Settings, tap Configure.

2. Mark the checkbox of each option that you want to appear during checkout. Then, complete the information in each section as needed.

3. In the Address Type section, do the following:
   a. Enter the text that you want to use as the Dropdown Label for the Address Type options during checkout.
   b. In the Dropdown Options list, select each option that you want to include as an address type.
   c. Select the option that you want to be used as the Default Value.
Address Type

4. In the **Authority to Leave** section, enter the **Checkbox Label** for the option.

Authority to Leave

5. In the **Signature Required** section, enter the **Checkbox Label** for the option.

Signature Required

6. When complete, tap **Save**.

Advanced Settings

The following settings are required to synchronize your store with the Temando API to enable **batch processing**.

1. To configure the **Advanced Settings**, tap **Configure**. Then, do the following:

Configure Advanced Settings

2. To synchronize Magento with other systems in your stack, set **Enable sync** to “Yes.”
3. To synchronize shipment entities, mark the **Shipment** checkbox.
4. Tap **Save** to return to the Magento Shipping section.
2. When complete, tap **Save Config.**

**Step 5: Complete the Shipping Profiles**

The final step of the setup is to complete the **Location**, **Carrier**, and **Package** shipping profiles. After these profiles are complete, you can create **Shipping Experience Rules** to add logic and automate parts of the shipping workflow.

When the initial configuration is complete, you can access the Magento Shipping Portal directly from the Magento Admin. You can use either of the following methods to access and complete the shipping profile information from the Magento Admin.

The Magento Shipping portal session times out after thirty minutes of inactivity.

**Method 1: Menu Options**

On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose the following:

- Carriers
- Locations
- Packaging
- Experiences

**Method 2: Configuration**

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Sales**, choose **Shipping Methods**. Then, scroll down to the **Magento Shipping** section. The shipping profile settings are at the end of the section.
3. Tap **Configure** to complete each profile. Then, follow the instructions to complete the Location, Carrier, and Package information.

4. When the profiles are complete, create **Shipping Experience Rules** to add logic and automate parts of your shipping workflow.

![Shipping Profiles](image)

**Locations**

The Locations grid lists the available shipping locations, and can include stores, warehouses, drop shippers, and company headquarters. Existing shipping locations can be edited or removed, and new shipping locations added. The locations that you enter appear in a drop-down list for each Shipping Partner profile, to identify the locations where the carrier is available.

![Locations](image)

**To add a new shipping location:**

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Locations**.

2. Tap **Create New Location**. Then, do the following.
a. Enter the **Location Name**, as you want it to appear throughout Magento Shipping.

b. Set the location **Type** to one of the following:

   - Store
   - Warehouse
   - Drop Shipper
   - Headquarters

c. To enable collection points, set **Enable Click & Collect** to “Yes.”

d. To make this the default pickup location for all shipments, set **Set as Default Location** to “No.”

   When creating a new shipment, the default location is entered automatically, but can be changed as needed.

3. Complete the fields in the **Address** section. If you need help, click the Help (🔗) button, or refer to the Field Descriptions at the end of this topic.

4. In the **Locality** field, enter an additional descriptive name to describe the location, such as the name of the neighborhood, small town, or suburb.

5. See the **Latitude/Longitude Finder** to get the GPS coordinates of the location. Then, enter the **Latitude** and **Longitude** coordinates.
6. Complete the fields in the **Contact** section. If you need help, click the Help (.tencent) button, or refer to the Field Descriptions at the end of this topic.

7. When complete, tap **Save Config**.
## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Name</td>
<td>The name that is used to refer to the shipping location throughout the Admin and storefront.</td>
</tr>
<tr>
<td>Type</td>
<td>Identifies the type of facility. Options: Store, Warehouse, Drop Shipper, Headquarters</td>
</tr>
<tr>
<td>Enable Click &amp; Collect</td>
<td>Determines if the location can be used as a collection point for Click &amp; Collect fulfillment. Options: Yes / No.</td>
</tr>
<tr>
<td>Set as Default Location</td>
<td>Identifies the location as the default for all shipments. When creating a shipment, the default location can be overridden as needed. Options: Yes / No.</td>
</tr>
</tbody>
</table>

### ADDRESS

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Identifies the type of address. Options: Business/Residential</td>
</tr>
<tr>
<td>Country</td>
<td>The country where the shipping facility is located.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>The street address of the shipping location.</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Additional street address information, if needed.</td>
</tr>
<tr>
<td>City</td>
<td>The city where the shipping facility is located.</td>
</tr>
<tr>
<td>State / Province</td>
<td>The state or province where the shipping facility is located.</td>
</tr>
<tr>
<td>Zip / Postal Code</td>
<td>The ZIP or postal code where the shipping facility is located.</td>
</tr>
<tr>
<td>Dependent Locality</td>
<td>An additional description of the location, such as the name of a small town or suburb.</td>
</tr>
<tr>
<td>Longitude</td>
<td>The GPS longitude coordinate of the shipping facility. Use the Latitude/Longitude Finder to get the GPS longitude coordinate of your location.</td>
</tr>
<tr>
<td>Latitude</td>
<td>The GPS latitude coordinate of the shipping facility. Use the Latitude/Longitude Finder to get the GPS latitude coordinate of your location.</td>
</tr>
</tbody>
</table>

## CONTACT
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organisation Name</td>
<td>The name of the organization that is associated with the shipping location.</td>
</tr>
<tr>
<td>Person First Name</td>
<td>The first name of the primary contact at the shipping location.</td>
</tr>
<tr>
<td>Person Last Name</td>
<td>The last name of the primary contact at the shipping location.</td>
</tr>
<tr>
<td>National Identification Number</td>
<td>The National Identification Number of the contact organization, if applicable. For example, the INSEE code (France).</td>
</tr>
<tr>
<td>Tax Identification Number</td>
<td>The Tax Identification Number assigned to the contact organization, if applicable. For example, TFN (Australia), TIN (France).</td>
</tr>
<tr>
<td>Email</td>
<td>The email address of the primary contact at the shipping location.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>The telephone number of the shipping location.</td>
</tr>
<tr>
<td>Fax Number</td>
<td>The fax number of the shipping location.</td>
</tr>
</tbody>
</table>

### Shipping Partners

Carrier profiles for Magento Shipping are managed from the Stores menu. New connections to carriers can be added, and existing connections can be edited or deleted from the Shipping Partners grid.

For a complete list of supported countries and carriers, see Support Countries.
To add a new carrier:

1. On the Admin sidebar, choose Stores. Then under Shipping, choose Carriers.
2. Under Available Carriers, find the shipping partner that you want to add. For a description of services, click Show more.
3. To complete the setup, click Connect.

Shipping Partners

4. Complete each step as follows. Your progress is tracked at the top of the page.

   If you do not have an account, you are instructed to contact the carrier. When your account is ready, return to this step and continue.

   a. Under Step 1, choose “Yes” if you have an account with the carrier. Then, tap Next.
**Step 1: Carrier Account**

b. Some carriers require that you accept the terms of a license agreement. If applicable, read the License Agreement. To continue, mark the I accept checkbox, and tap Next.

**Step 2: License Agreement**

c. Under Step 3, enter your carrier Account Number. Then, complete the information in the Shipping Address and User Contact and Address sections. This information must match the information in your carrier account.

In the Locality field, enter the city.
Step 3: Account Details

To edit an existing carrier:

1. Find the carrier in the Shipping Partners grid. Then in the Action column, select Configure.
2. Make the necessary changes to the carrier profile.
3. When complete, tap Save.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrier Connection</td>
<td>The name that is used for the carrier during checkout.</td>
</tr>
<tr>
<td>Nickname</td>
<td></td>
</tr>
<tr>
<td>Locations</td>
<td>Identifies each shipping location that can be used by the carrier.</td>
</tr>
<tr>
<td>Services</td>
<td>Identifies each shipping service that is provided by the carrier.</td>
</tr>
</tbody>
</table>

Packaging

The Packaging grid lists the available packaging options that are available through your store. Existing packaging profiles can be edited or removed, and new packaging profiles added. The packaging options appear in a dropdown for each Shipping Partner profile, and identify each type of packaging that is supported by the carrier.
To add a package:

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Packaging**. Then, do the following:
   
a. Enter the **Name** of the package.

b. Choose the package **Type**.

c. In the **Tare Weight** field, enter the weight of the empty package. Then, set **Tare Unit** to the unit of measurement that is used for the Tare Weight value.

d. Enter the **Maximum Weight** that can be placed in the package. Then, set **Maximum Weight Unit** to the unit of measurement that is used for the Maximum Weight value.

2. Complete the fields in the **Outer Dimensions** section. If you need help, click the Help (❓) button, or refer to the Field Descriptions at the end of this topic.
3. Complete the fields in the **Inner Dimensions** section. If you need help, click the Help (ⓘ) button, or refer to the Field Descriptions at the end of this topic.

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

**Field Descriptions**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the packaging type.</td>
</tr>
<tr>
<td>Type</td>
<td>Describes the basic packaging type. Options:</td>
</tr>
<tr>
<td></td>
<td>Box</td>
</tr>
<tr>
<td></td>
<td>Carton</td>
</tr>
<tr>
<td></td>
<td>Crate</td>
</tr>
<tr>
<td></td>
<td>Cylinder</td>
</tr>
<tr>
<td></td>
<td>Document Envelope</td>
</tr>
<tr>
<td></td>
<td>Flat Pack</td>
</tr>
<tr>
<td></td>
<td>Letter</td>
</tr>
<tr>
<td></td>
<td>Pallet</td>
</tr>
<tr>
<td></td>
<td>Parcel</td>
</tr>
<tr>
<td></td>
<td>Satchel/Bag</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>Tare Weight</td>
<td>The weight of the empty container that is used to calculate the shipment load when added to content weight.</td>
</tr>
<tr>
<td>Tare Weight Unit</td>
<td>The unit of measurement that is used to describe tare weight.</td>
</tr>
</tbody>
</table>
# Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>g</td>
<td>Gram</td>
</tr>
<tr>
<td>oz</td>
<td>Ounce</td>
</tr>
<tr>
<td>kg</td>
<td>Kilogram</td>
</tr>
<tr>
<td>lb</td>
<td>Pound</td>
</tr>
</tbody>
</table>

**Maximum Weight**
The maximum weight allowed for this packaging type.

**Maximum Weight Unit**
The unit of measurement that is used to describe the maximum weight.

<table>
<thead>
<tr>
<th></th>
<th>Gram</th>
</tr>
</thead>
<tbody>
<tr>
<td>oz</td>
<td>Ounce</td>
</tr>
<tr>
<td>kg</td>
<td>Kilogram</td>
</tr>
<tr>
<td>lb</td>
<td>Pound</td>
</tr>
</tbody>
</table>

## OUTER DIMENSIONS

<table>
<thead>
<tr>
<th>LENGTH</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length</td>
<td>The package length when measured from the outside.</td>
</tr>
<tr>
<td>Width</td>
<td>The package width when measured from the outside.</td>
</tr>
<tr>
<td>Height</td>
<td>The package height when measured from the outside.</td>
</tr>
<tr>
<td>Unit</td>
<td>Determines the unit of measurement for the outer dimensions of the package. Options:</td>
</tr>
<tr>
<td>cm</td>
<td>Centimeter</td>
</tr>
<tr>
<td>in</td>
<td>Inch</td>
</tr>
<tr>
<td>m</td>
<td>Meter</td>
</tr>
<tr>
<td>mm</td>
<td>Millimeter</td>
</tr>
<tr>
<td>ft</td>
<td>Foot</td>
</tr>
</tbody>
</table>

## INNER DIMENSIONS

<table>
<thead>
<tr>
<th>LENGTH</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length</td>
<td>The package length when measured from the inside.</td>
</tr>
<tr>
<td>Width</td>
<td>The package width when measured from the inside.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Height</td>
<td>The package height when measured from the inside.</td>
</tr>
<tr>
<td>Unit</td>
<td>Determines the unit of measurement for the inner dimensions of the package. Options: cm</td>
</tr>
<tr>
<td></td>
<td>in</td>
</tr>
<tr>
<td></td>
<td>m</td>
</tr>
<tr>
<td></td>
<td>mm</td>
</tr>
<tr>
<td></td>
<td>ft</td>
</tr>
</tbody>
</table>
Shipping Experience Rules

Use the Shipping Experiences option in the Magento Shipping Portal menu to create rules that automate the shipping process. Each shipping experience rule is associated with a specific step in the shipment workflow.

Because most shipping experience rules reference information from the Locations, Shipping Partners, and Packaging configuration, you should complete the basic setup of each profile before creating rules.

Shipping Experience

Shipment Workflow

Your customer is ready to check out their cart.

- Qualify Rules

You receive your customer’s order.

- Allocation Rules
- Quoting Rules
- Batch Fulfillment Rules
- Fulfillment Rules

Shipment is dispatched.

Delivery arrives.
The following instructions show how to create a Qualify rule; however, the process is essentially the same for all shipping experience rules. First, describe the condition, then, choose an operator, and define the action to be taken. You can follow these basic instructions to create any type of rule. Refer to the field descriptions for more information about different rule types and options.

**To create a shipping experience rule:**

1. In the Admin sidebar, choose Stores. Then under Shipping, choose Experiences.
2. Tap **Create New Experience**. Then, do the following:

   ![Shipping Experiences](image)

   **Shipping Experiences**

   a. Enter a descriptive **Name** for the new rule.

   b. For now, accept the default **Status** of “Draft.” When you are ready to “go live” with the rule in your store, you can change Status to “Production.”

   ![Experience Name and Status](image)

   **Experience Name and Status**

   c. Choose the type of rule that you want to create. In the rule section, tap **Create Rule**. Then, do the following:

   This example shows how to create a Qualify Rule. Notice the icon and note before each section is mapped to the corresponding step in the shipment workflow.

   ![Create Rule](image)

   **Create Rule**
d. Enter a brief **Description** of the rule that states its purpose and the conditions that trigger the rule.

![Description](image1)

3. In the **Conditions** section, choose the **Condition** that must be met to trigger the rule.

Think about conditions that are required to trigger the rule. For example, the condition might be, “Country is China,” or “Country is not China.” You can also combine multiple conditions, such as, “Country is China or Hong Kong,” or “Country is China and order items total weight is less than 50 pounds (lb).”

![Conditions](image2)

4. Choose the **Operator** that is needed to describe the condition. Then, do the following:

![Choose an Operator](image3)
a. Complete the condition by entering appropriate values in the remaining field(s).

![Complete the Condition](image)

b. To add another condition, click Add Condition. Then, choose the logical operator that describes how the conditions are to be applied.

- **AND**  
  Triggers the rule when both the previous condition and the new condition are met.

- **OR**  
  Triggers the rule when either the previous condition, or the new condition is met.

![Add Another Condition](image)

c. Repeat the previous steps to complete the new condition.
5. In the **Outcomes** section, do the following:
   
   a. Choose the **Action** that applies when the conditions are met.
   
   b. Enter the **Shipping Method Label** that appears during checkout.
   
   c. Choose the **Currency** to be used to display the shipping charge.
   
   d. To add an additional action, click **Add Outcome**.

6. When complete, tap **Save**.

   The description of the new rule appears in the list of Qualify Rules.
7. Tap **Finish** to save the rule and exit.

## Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>A descriptive internal reference to identify the rule.</td>
</tr>
<tr>
<td>Status</td>
<td>Determines if the rule is active in the store. Options: Draft / Production</td>
</tr>
</tbody>
</table>

### QUALIFY RULES

<table>
<thead>
<tr>
<th>Qualify Rules</th>
<th>Specifies the shipping methods that you want to make available to customers during checkout, such as Flat Rate, Collection Point, and Click &amp; Collect. If more than one qualify rule exists, the first one to have its conditions met is used.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>A brief description of the rule for internal reference.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Determines the conditions that must be met to trigger the rule. A simple condition might have two parts (or operands), separated by an operator. The options for the first part of the expression are listed below. The options for the second part of the expression vary, depending upon the first option. For example, if the first part of the condition is &quot;Destination country,&quot; the second part will be a list of countries where the condition applies. The Conditions block walks you through the process of building the condition and presents the available options for the condition. Options for the first part of the condition: Always, Destination country.</td>
</tr>
</tbody>
</table>

Earlier version of Magento Shipping had separate rules for Qualification, Click & Collect, and Collection Point. These have now been consolidated under Qualify Rules. Any rules created with an earlier version are automatically migrated to the Outcome section of a Qualify rule.
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination postal code</td>
<td></td>
</tr>
<tr>
<td>Order items with SKU</td>
<td></td>
</tr>
<tr>
<td>Order items with name</td>
<td></td>
</tr>
<tr>
<td>Order items with categories</td>
<td></td>
</tr>
<tr>
<td>Order items with weight</td>
<td></td>
</tr>
<tr>
<td>Order items with quantity</td>
<td></td>
</tr>
<tr>
<td>Order items with price</td>
<td></td>
</tr>
<tr>
<td>Order items total weight</td>
<td></td>
</tr>
<tr>
<td>Order total</td>
<td></td>
</tr>
<tr>
<td>Ordered at</td>
<td></td>
</tr>
</tbody>
</table>

Operator

The following operators can be placed between the two parts of the condition. Options:

- any of
- is
- is not
- not any of

Use the following logical operators to determine how multiple conditions are used to trigger the rule.

**AND**  
(Default) Triggers the rule when both the previous condition and the new condition are met.

**OR**  
Triggers the rule when either the previous condition, or the new condition is met.

Outcomes

The outcome describes the action that is taken when the condition is met. The selection of options varies by type of condition. Actions:

**Offer a flat rate**  
Additional fields:
- Shipping Method Label (as shown on checkout page)
- Cost
- Currency

**Offer collection points locations**  
In the list, mark the checkbox of each carrier that you want to associate with the action.

Additional fields:
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer click and collect locations</td>
<td>In the list, mark the checkbox of each location that you want to associate with the action. Additional fields: Shipping Method Label (as shown on checkout page) Cost Currency</td>
</tr>
</tbody>
</table>

Click & Collect must be enabled in the Magento Shipping configuration for each store or warehouse location.

### ALLOCATION RULES

<table>
<thead>
<tr>
<th>Allocation Rules</th>
<th>Controls the automated processing of shipments.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>A brief description of the rule for internal reference.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Determines the conditions that must be met to trigger the rule. Options: Options: Always Order items with SKU Order items with name</td>
</tr>
<tr>
<td>Operator</td>
<td>(Same as for Qualify Rules)</td>
</tr>
<tr>
<td>Outcomes</td>
<td>Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions: Displays list of locations Additional fields: Package Type Value Unit</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

**QUOTING RULES**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quoting Rules</td>
<td>Control the carrier service selection. The rule is triggered when you get quotes while processing an order.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the rule for internal reference.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Determines the conditions that must be met to trigger the rule. Options: Always, Destination country, Destination postal code, Packages gross weight, Origin Location Type, Destination Location Type, Signature Required, Authority to Leave</td>
</tr>
<tr>
<td>Operator</td>
<td>(Same as for Qualify Rules)</td>
</tr>
<tr>
<td>Outcomes</td>
<td>Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions: Quote With All Carriers, Quote With Carrier Services</td>
</tr>
</tbody>
</table>

**BATCH FULFILLMENT RULES**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Fulfillment Rules</td>
<td>Allows you to run automated batch fulfillment processing.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the rule for internal reference.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Specifies the conditions that must be met to trigger a batch fulfillment rule. Option: Always</td>
</tr>
<tr>
<td>Operator</td>
<td>(Same as for Qualify Rules)</td>
</tr>
</tbody>
</table>
| Outcomes | Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions:
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Shipment with Cheapest Carrier Service</td>
<td>In the list, mark the checkbox of each carrier that you want to associate with the action.</td>
</tr>
<tr>
<td>Book Shipment with Carrier Service</td>
<td>In the list, mark the checkbox of each carrier that you want to associate with the action.</td>
</tr>
</tbody>
</table>

### FULFILLMENT RULES

<table>
<thead>
<tr>
<th>Fulfillment Rules</th>
<th>Allows you to override the default carrier service, and choose another based on a set of conditions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>A brief description of the rule for internal reference.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Specifies the conditions that must be met to trigger a batch fulfillment rule. Options: Destination Location Type Signature Required Authority to Leave Shipment Status Packed Items with SKU Packed Items with Name</td>
</tr>
<tr>
<td>Operator</td>
<td>(Same as for Qualify Rules, although selection might vary for condition.)</td>
</tr>
<tr>
<td>Outcomes</td>
<td>Describes the action to be taken, and provides any additional information that is needed to reach the outcome. Actions:</td>
</tr>
</tbody>
</table>
# Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include a shipment return label</td>
<td>In the list, mark the checkbox of each carrier that you want to associate with the action. This action generates a return shipment that can be accessed only from Magento Commerce. The return label is added to the package at the time of fulfillment. Any service that is marked with an asterisk (*) might have additional charges at the time of booking. Make sure that you understand which type of service you have selected for your returns, and how the carrier charges for that service.</td>
</tr>
<tr>
<td>Book Shipment with Cheapest Carrier</td>
<td>In the list, mark the checkbox of each carrier that you want to associate with the action.</td>
</tr>
<tr>
<td>Book Shipment with Carrier Service</td>
<td>In the list, mark the checkbox of each carrier that you want to associate with the action.</td>
</tr>
</tbody>
</table>
Click & Collect

Click & Collect allows customers to order online, and pick up their orders at the store or another designated location. For a description of how Click & Collect is specified during checkout, see: Customer Experience.

Every Click & Collect order generates a pickup record. Like a shipment, the pickup record is associated with the specific order. The main difference between the two is that a pickup does not have packaging or quote/booking requirements. Because Click & Collect is available only from the storefront, it cannot be used for orders that are created from the Admin.

Before you begin:

1. Complete the setup of your Click & Collect Locations. The location name, address, and opening/closing hours are visible to the customer during checkout. Special hours are included if they go into effect within the next seven days.

   The pickup location that a customer chooses during cannot be changed from the Admin.

2. Create a Qualify Shipping Experience Rule with the outcome set to “Offer click and collect locations.” The rule can be configured to offer one or more locations. If the Click & Collect location is set to “All,” any new locations appear to the customer during checkout.

3. In the Magento Shipping configuration, set Enable Click and Collect to “Yes.”

To fulfill a Click & Collect order:

1. Navigate to the Pickups page.

   The first step to fulfill a pickup is to navigate to the Pickups page. The Pickups grid lists all pickups that have been created.

2. Filter the Pickups grid.

   The Pickups grid can be filtered by a variety of fields, with the main used being Origin Location and Status. Any filter settings made by the Admin user are retained for that user’s future sessions.

   If you have multiple locations, it is recommended that you filter the grid by Origin Location to ensure that only orders which are to be picked up at your location listed. You can also filter the list based on a Status field value of “Pickup Requested” to ensure that the list includes only new pickup records that are not yet in process.

3. Print packing slips.

   To print packing slips for all filtered pickups, choose Select All, and set the Action control to Print Packing Slips.”
The packing slips are downloaded as a single PDF file, which can be printed immediate, or saved and printed later. Each packing slip contains the customer details, the products ordered, and a barcode that references the pickup.

4. Indicate an order is ready for pickup.

When the orders have been picked and set aside, they are marked “Ready for Pickup.” The customer is notified by email that their order is ready for pickup.

To prevent duplication, any items included in pickups that are marked “Ready for Pickup” are not available to be allocated to a package.

5. After the customer picks up the package at the designated location, change the status in the upper-right corner of the pickup record to “Picked Up.”

**Scenario 1: All Items Ready for Pickup**

By default, a pickup record indicates that all items in the order are packed. Tap **Ready for Pickup** to trigger the following events:

- The status of the pickup changes to “Ready for Pickup.”
- An email is sent to notify the customer that the order is ready to collect.
- The Pickup page closes, and you return to the Pickups grid.

**Scenario 2: Partial Order Ready for Pickup**

If only some of the items are available, adjust the **Qty Packed** values to reflect the items that are ready for pickup.

Tap **Ready for Pickup** to initiate the partial pickup process. The following events take place:

- The status of the partial pickup changes to “Ready for Pickup.”
- An email is sent to notify the customer that the specified items are ready to collect.
- A new pickup record with a status of “Pickup Requested” is created for the remaining items.
- The Pickup page closes, and you return to the Pickups grid.

The remaining pickup items can be fulfilled as either a separate pickup or shipment when the items become available.

After the customer collects the items, the pickup record is marked, “Picked Up,” and an email is sent to the customer to confirm that the items have been fulfilled.

**To view a pickup record:**

Use either of the following methods to view a pickup record:

**Method 1: Scan the Packing Slip Barcode**

Simply scan the barcode from the packing slip to view the corresponding pickup record. The **Go to Pickup** field in the upper-right corner of the Pickup page is designed to automatically accept a barcode that is scanned from a packing slip.
Method 2: View Action
Find the record in the Pickup grid. Then in the Action column, click View.

To cancel a pickup:
Open the pickup record, and tap Cancel Pickup.

- If the status of the pickup was “Ready for Pickup,” the items are returned to inventory.
- The customer is notified by email that the pickup has been canceled.
Collection Points

Collection points allow a customer to place an order online and have it shipped to a designated collection point, rather than to their address. For a description of how collection points are specified during checkout, see: Customer Experience.

From a Merchants perspective, you have full control over which carrier’s collection points will be made available to customers in the checkout. The fulfilment workflow is the same as Shipments.

**Before you begin:**

There are two areas of configuration that need to be completed before Customers can start nominating that an order be shipped to a Collection Point.

1. **Shipping Experience Setup**

Create a Qualify rule that offers collection point locations during checkout. The collection points can be specified per carrier, but are combined into a single list for the customer.

- **All Carriers**
  
  This is the default filter for offering collection point locations. If a rule is configured in this fashion, new carriers that are configured which support collection points will automatically be presented to a customer without having to update the experience rule.

- **Specific Carriers**
  
  A rule can be configured to include a selection of one or more carriers. For example, you might use this to apply different flat rate shipping rates per carrier, depending on the collection point selected.

2. **Magento Shipping Configuration**

When enabled, the “Send to Collection Point” configuration setting causes the collection point option to be included under Shipping Methods during checkout.

---

**Troubleshooting**

- **Fail to Book**
  
  Issue
  
  At least one shipment in a batch fails to book.

  Workaround
  
  1. Click **Find Solutions**.

     The Find Solutions page provides details about each failed shipment, including Magento Order ID, Ship-to Name, Destination Address, and Reason for Failure.

     2. To examine the individual order associated with a shipment that failed to book, click **View**.
CHAPTER 86:

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 for B2B 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.
For detailed information in the online guide, see UPSUPS.

**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.
For detailed information in the online guide, see USPSUSPSUSPS.

**FedEx**
Offers domestic and international shipping services by land and air to more than 220 countries.
For detailed information in the online guide, see FedExFedExFedEx.

**DHL**
Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.
For detailed information in the online guide, see DHLDHLDHL.
CHAPTER 87:

Shipping Labels

Magento for B2B 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.

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.
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](image)

   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  The default dimensions of the package. To make these fields appear, set Size to “Large.”
Height, Girth

c. Expand FedEx, 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.
3. When complete, tap **Save Config**.

### Carrier Requirements

<table>
<thead>
<tr>
<th>CARRIER</th>
<th>REQUIREMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>USPS</td>
<td>Requires a USPS account. As of February 23, 2018, USPS requires all shipping labels to include postage.</td>
</tr>
<tr>
<td>UPS</td>
<td>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.</td>
</tr>
<tr>
<td>FedEx</td>
<td>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.</td>
</tr>
<tr>
<td>DHL</td>
<td>Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>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.</td>
</tr>
<tr>
<td>Customs Value</td>
<td>(International shipments only) The declared value or sales price of the contents of an international shipment.</td>
</tr>
<tr>
<td>Total Weight</td>
<td>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.</td>
</tr>
<tr>
<td>Length, Width, Height</td>
<td>(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.</td>
</tr>
</tbody>
</table>
### Required Carrier Configuration Settings (cont.)

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Required</td>
<td>No confirmation of delivery is sent to the store by the shipping carrier.</td>
</tr>
<tr>
<td>No Signature</td>
<td>A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.</td>
</tr>
<tr>
<td>Signature Required</td>
<td>The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.</td>
</tr>
<tr>
<td>Direct</td>
<td>(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.</td>
</tr>
<tr>
<td>Indirect</td>
<td>(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.</td>
</tr>
<tr>
<td>Contents</td>
<td>(USPS Only) Select one of the following descriptions of the package: Gift Documents Commercial Sample Returned Goods Merchandise Other</td>
</tr>
<tr>
<td>Explanation</td>
<td>(USPS Only) A detailed description of the package contents.</td>
</tr>
<tr>
<td>Adult Required</td>
<td>The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Specifies the type of a package. Select one of the predefined values. Available package types are different for each shipping carrier.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Total Weight</td>
<td>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.</td>
</tr>
<tr>
<td>Length</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Width</td>
<td>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.</td>
</tr>
<tr>
<td>Height</td>
<td>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.</td>
</tr>
<tr>
<td>Signature</td>
<td>Confirmation Defines delivery confirmation. Options:</td>
</tr>
<tr>
<td></td>
<td>Not Required</td>
</tr>
<tr>
<td></td>
<td>No Signature</td>
</tr>
<tr>
<td></td>
<td>Signature Required</td>
</tr>
<tr>
<td></td>
<td>Adult Required</td>
</tr>
<tr>
<td></td>
<td>Direct (FedEx only)</td>
</tr>
<tr>
<td></td>
<td>Indirect (FedEx only)</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contents</td>
<td>(Available for USPS shipments only) Description of the package contents. Options: Gift Documents Commercial Sample Returned Goods Merchandise Other</td>
</tr>
<tr>
<td>Explanation</td>
<td>(USPS shipments only) Detailed description of the package content.</td>
</tr>
</tbody>
</table>
REPORTS
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.
CHAPTER 88:
Reports Menu

Magento for B2B 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.

To display the Reports menu:
On the Admin sidebar, tap Reports.
Menu Options

Marketing

A selection of marketing reports, including Products in Cart, Search Terms, Abandoned Carts, and Newsletter Problem Reports.

Reviews

The selection of product review reports includes By Customer and By Product.

Sales

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and settlement reports for PayPal and Braintree.

Customers

The selection of customer reports includes Order Total, Order Account, New, Wish Lists, and Segments.

Products

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.

Business Intelligence

The Advanced Reporting dashboard gives you valuable insight with a dynamic set of product, order, and customer reports, powered by Magento Business Intelligence. For more sophisticated reporting and analysis, sign up for a free trial of Bi-Essentials.
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.

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 89: Marketing Reports

Marketing reports provide information about the status of shopping carts, the use of search terms, and newsletter transmissions.

Products in Cart Report
Reports

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

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

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

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 90:
Review Reports

The Review Reports provide information about product reviews by customer and by product.

- By Customers
- By Products

<table>
<thead>
<tr>
<th>ID</th>
<th>Product</th>
<th>Reviews</th>
<th>Average</th>
<th>Average Approved</th>
<th>Last Review</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>107</td>
<td>Bike Inflator Tire</td>
<td>4</td>
<td>85.0000</td>
<td>85.0000</td>
<td>Dec 2, 2019, 11:47:32 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>661</td>
<td>Water Filtration System</td>
<td>4</td>
<td>70.0000</td>
<td>70.0000</td>
<td>Dec 4, 2019, 11:47:54 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>1625</td>
<td>Treadmill Exercise Bike</td>
<td>4</td>
<td>85.0000</td>
<td>85.0000</td>
<td>Dec 4, 2019, 11:48:50 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>20</td>
<td>Cross Training Shoes</td>
<td>4</td>
<td>85.0000</td>
<td>85.0000</td>
<td>Dec 4, 2019, 11:47:30 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>1645</td>
<td>Core Strength System</td>
<td>4</td>
<td>85.0000</td>
<td>85.0000</td>
<td>Dec 4, 2019, 11:47:50 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>1423</td>
<td>Indoor Workout Top</td>
<td>4</td>
<td>85.0000</td>
<td>85.0000</td>
<td>Dec 4, 2019, 11:47:30 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>641</td>
<td>Ecoball CoreTech Fitness Ball</td>
<td>4</td>
<td>85.0000</td>
<td>85.0000</td>
<td>Dec 4, 2019, 11:47:53 AM</td>
<td>Show Reviews</td>
</tr>
<tr>
<td>1241</td>
<td>Yoga Ropes Set</td>
<td>4</td>
<td>70.0000</td>
<td>70.0000</td>
<td>Dec 4, 2019, 11:47:56 AM</td>
<td>Show Reviews</td>
</tr>
</tbody>
</table>

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 91: Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.
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

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 and total shipping.

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

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

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 92:

Customer Reports

Customer reports provide insight into customer activity during a specified period of time or date range.

Order Total Report
Reports

**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**

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**

The New Accounts Report shows the number of new customer accounts opened during a specified time interval or date range.
CHAPTER 93: Product Reports

The product reports give you insight regarding products viewed and ordered, bestsellers, stock levels, and downloads.
### 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.

### 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

The Low Stock Report lists all products with stock levels within a specified range.
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

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 94: Private Sales Reports

The Private Sales Reports provide information about events and private sales.

*Invitations Report*
Reports

Invitations

The Invitations Report shows the number of invitations sent during the specified time period, and the number accepted, and discarded.

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.

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 95: Marketing Automation

The Marketing Automation section of the Reports menu includes a wide selection of reports to help you track campaign activity and performance.

To access Marketing Automation reports:

1. On the Admin sidebar, choose Reports.

2. In the menu under Marketing Automation, choose one of the following reports:
   - Importer Status
   - Automation Enrollment
   - Campaign Sends
   - Cron Tasks
   - Dashboard
   - Log Viewer
   - Abandoned Carts
Business Intelligence
Contents

Magento advanced reporting and business intelligence tools give you the insight you need to make sound business decisions. Analyze your top-performing customers, products, and promotions to find new opportunities for growth. Then, share the insights across your organization with just a few clicks.

Advanced Reporting
Magento BI Essentials
New Relic Reporting
CHAPTER 96: Advanced Reporting

Advanced Reporting gives you access to a suite of dynamic reports that are based on your product, order, and customer data, with a personalized dashboard that is tailored to your business needs. Advanced Reporting is a free, cloud-based service that is powered by Magento Business Intelligence.

For technical information, see Advanced Reporting in our developer documentation.

Requirements

- The website must run on a public web server.
- The domain must have a valid security (SSL) certificate.
- Magento must have been installed or upgraded successfully without error.
- In the Magento configuration, the Base URL (Secure) setting for the store view must point to the secure URL. For example https://yourdomain.com
In the Magento configuration, **Use Secure URLs on Storefront**, and **Use Secure URLs in Admin** must be set to “Yes.”

Make sure that **Magento crontab** is created and cron jobs are running on the installed server.

The initial release of Advanced Reporting supports only one base currency.

**Step 1: Enable Advanced Reporting**

In the Magento configuration, **Advanced Reporting** is enabled by default, and starts automatically if cron is **configured** and running. An attempt to establish the subscription is initiated at the beginning of each hour over the next 24-hours until successful. The subscription status is “pending” until the subscription is successfully established.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, choose **General**. Then under **Advanced Reporting**, do the following:
   a. Verify that **Advanced Reporting Service** is set to “Enable.” (This is the default setting.)
   b. Set the **Time of day to send data** to the hour, minute, and second, according to a 24-hour clock, that you want the service to receive updated data from your store. By default, data is sent at 2:00 AM.
   c. Under **Industry Data**, choose the **Industry** that best describes your business.

3. When complete, tap **Save Config**.
4. When prompted, click the **Cache Management** in the message at the top of the page. Then, refresh any invalid caches.
5. Wait overnight, or until after the time of your next scheduled update. Then, check the status of your subscription. If the status is still “pending,” make sure that your installation meets all of the requirements.

**Step 2: Access Advanced Reporting**

1. Do one of the following:
   - In the Admin sidebar, choose Dashboard. Then, tap Advanced Reporting.
   - On the Admin sidebar, choose Reports. Then under Business Intelligence, choose Advanced Reporting.

The Advanced Reporting dashboard provides a quick summary of your orders, customers, and products. Make sure to scroll down to see the full dashboard.

2. To get a better view of the data, set the Filters in the upper-right corner to the time period and store view that you want to include in the report. Then, do the following:
   - Hover over any data point for more information.
   - Click each tab to see all dashboard reports.

![Data Point](image)
To access your data resources:

1. In the upper-right corner of the Advanced Reporting dashboard, click **Additional Resources**.

   ![Additional Resources](image1)

**Troubleshooting**

If you get a 404 “Page Not Found” message, verify that your store meets the **requirements** for Advanced Reporting. Then, follow the instructions to verify that the integration is installed.

![404 Error](image2)

*Advanced Reporting Not Available*
Verify that the Integration is Active

1. On the Admin menu, choose System. Then under Extensions, choose Integration.

2. Verify that the Magento Analytics user integration appears in the list, and that the Status is “Active.”

3. To reestablish the user, click Reauthorize. Then, do the following:

   ![Integrations](image)

   **Reauthorize**

   **a.** When prompted, tap Reauthorize to approve access to the API resources.

   ![Reauthorize Access to API Resources](image)

   **b.** Verify that the list of Integration Tokens for Extensions is complete. Then, tap Done.
4. Look for the message that indicates the integration “Magento Analytics user” has been reauthorized.

5. Wait overnight, or until after the time of your next scheduled update.

**Dashboard Reports**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ORDERS</strong></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>Shows all revenue received by the store view during the defined time period.</td>
</tr>
<tr>
<td>Orders</td>
<td>Shows all orders placed through the store view during the defined time period.</td>
</tr>
<tr>
<td>AOV</td>
<td>Shows the average order value placed through the store view during the defined time period.</td>
</tr>
<tr>
<td>Refunds</td>
<td>Shows all refunds processed through the store view during the defined time period.</td>
</tr>
<tr>
<td>Tax Collected</td>
<td>Shows all tax collected through the store view during the defined time period.</td>
</tr>
<tr>
<td>Shipping Collected</td>
<td>Shows all shipping fees collected through the store view during the defined time period.</td>
</tr>
<tr>
<td>Orders by Status</td>
<td>Shows the number of orders by status, for the store view during the defined time period.</td>
</tr>
<tr>
<td>Orders by Status</td>
<td>Lists a summary of the number of orders by status.</td>
</tr>
</tbody>
</table>
### Dashboard Reports (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coupon Usage</td>
<td>Lists all coupon codes and the number of users for each, redeemed through the store view during the defined time period.</td>
</tr>
<tr>
<td>Orders and Revenue by Billing Region</td>
<td>Lists the number of orders and revenue by region for the store view during the defined time period.</td>
</tr>
<tr>
<td>Tax Collected by Billing Region</td>
<td>Lists the amount of tax collected by region for the store view during the defined time period.</td>
</tr>
<tr>
<td>Shipping Fees Collected by Shipping Region</td>
<td>Lists the shipping fees collected by region for the store view during the defined time period.</td>
</tr>
<tr>
<td><strong>CUSTOMERS</strong></td>
<td></td>
</tr>
<tr>
<td>Unique Customers</td>
<td>Shows the number of unique customer accounts associated with the store view during the defined time period.</td>
</tr>
<tr>
<td>New Registered Accounts</td>
<td>Shows the number of new customer accounts registered with the store view during the defined time period.</td>
</tr>
<tr>
<td>Top Coupon Users</td>
<td>Lists the top coupon users by Customer ID, and the number of orders placed with coupons for the store view during the defined time period.</td>
</tr>
<tr>
<td>Customer KPI Table</td>
<td>Lists the number of orders, revenue, and average order value by Customer ID for the store view during the defined time period.</td>
</tr>
<tr>
<td><strong>PRODUCTS</strong></td>
<td></td>
</tr>
<tr>
<td>Quantity of Products Sold</td>
<td>Shows the number of products sold through the store view during the defined time period.</td>
</tr>
<tr>
<td>Products Added to Wishlists</td>
<td>Lists all products added to wishlists through the store view during the defined time period.</td>
</tr>
<tr>
<td>Best Selling Products by Quantity</td>
<td>Lists the best-selling products and quantity sold through the store view during the defined time period.</td>
</tr>
<tr>
<td>Best Selling Products by Revenue</td>
<td>Lists the best-selling products and revenue generated by the sale of the product through the store view during the defined time period.</td>
</tr>
</tbody>
</table>
Magento Business Intelligence (Magento BI) is a cloud-based data management and analytics platform. Magento BI provides users with the ability to easily consolidate and manage their data sources, model their data, create charts and reports, and maintain a single source of truth.

When you activate a Magento BI Essentials account, you get access to five dashboards with approximately 100 reports. These reports are designed to provide insights around your data and answer questions like: “How are my orders growing month-over-month? Who are my most loyal customers? Is my coupon strategy working?”

As a Magento Commerce customer, you are entitled to a BI Essentials account at no additional cost:

- If you are a Magento Commerce Cloud Pro subscriber, please reach out to your Customer Success Manager to set you up with your entitled BI Essentials account.
- If you are a Magento Commerce Cloud Starter subscriber, refer to this support article for information about activating your entitled BI Essentials account.
- If you are a Magento Commerce On-Prem subscriber, use the following information to activate your account and access BI Essentials.

The instructions in this section walk you through the activation, and introduce some basic features of Magento BI Essentials. For more detailed information, refer to the Magento BI Help Center.

**To activate your Magento BI Essentials account:**

1. Log in to your Magento account (account.magento.com).
2. Select the **My Account** tab. Then choose **My MBI Instances** in the side navigation.
3. Tap **Create Instance**.
4. Select the subscription for the instance creation (if you have only one active Magento subscription, this is selected by default). Then, tap **Continue**.
5. Complete the account creation form. Then, tap **Continue**.
Check your email for a Welcome message from the Magento BI Team, with your log-in credentials. To learn more, see the Essentials Quick Start Video Series.

**To access Magento BI Essentials:**

**Method 1: From the Admin**

1. From the Dashboard of your store, tap **Go to Advanced Reporting**.
2. In the upper-right corner, click **Additional Resources**. Then under **Magento Business Intelligence**, choose **Magento BI Website**.
Method 2: From your browser

1. Go to the Magento BI website.

2. Enter your Email Address and Password. Then, tap Sign In.

3. Your Magento BI dashboard appears.
Dashboards

BI Dashboards give you a quick view of your store’s performance and sales activity at a glance. Individual dashboards can be shared with other users, and organized into logical groups. You can also set different levels of permission to others users.
It’s easy to create a new report, add it to a dashboard, and export the data to Excel. Charts and reports can be resized and dragged into position on the dashboard.

**Dashboard**

**To create a new dashboard:**

1. On the menu, choose **Dashboards**.
2. The name of the default dashboard appears in the upper-left corner of the dashboard header. Click the down arrow (✓) to show the available options.
3. Tap **Create Dashboard**. Then, do the following:
   a. Enter a **Name** for your dashboard.
   b. To create a new **Group** for the dashboard, enter the name of the group.
For example, if your Magento installation has multiple store views, you might create a Group for each store view.

c. Tap **Create**.

![Dashboard Name](image)

**Dashboard Name**

d. The name of your new dashboard appears in the upper-left corner. Click the down arrow to show the options. If you created a group, the new dashboard appears below the group in the list.

![Add Report](image)

**Add Report**

4. To add a report, do one of the following:
   - Click the **Add a report** prompt on the page.
   - In the dashboard header, click **Add Report**.

5. Click **Create Report** to show the **Report Builder Options**.
To arrange items on a dashboard:

- To resize a chart or report, drag the lower-right corner to the new size.
- To move a chart or report, hover over the title or header until the cursor changes to a cross. Then, drag it into position.

To manage dashboard settings:

1. On the menu, choose Manage Data. Then in the sidebar, choose Dashboards.
2. If applicable, enter a new Dashboard Name.
3. To assign the dashboard to a specific Dashboard Group, choose from the list of groups.

Permissions

To give all users the same level of access to the dashboard, do the following:

1. Under Shared with, choose one of the following options:
   - View
   - Edit
   - None
2. When prompted for confirm, tap OK to update the permissions level for each user.
3. To change the permission level of an individual, find the user in the list change the permission level. The change is automatically saved.

4. To make this dashboard the default for your BI Essentials account, tap Make Default.
5. To remove the dashboard, tap Delete Dashboard.
Report Builder

**Visual Report Builder**

The Visual Report Builder is the easiest way to visualize your data. Create charts, add metrics, and segment your data all with a few clicks.

---

**SQL Report Builder**

The SQL Report Builder gives you the power to directly query your data warehouse, view the results, and quickly transform them into a chart.
Visual Report Builder

Visual Report Builder makes it easy to create quick reports based on predefined metrics. Each metric includes a query that defines the set of data for the report.

The following example shows how to create a simple report, group the data by an additional dimension, set the date and time interval, change the chart type, and save the report to a dashboard.

To create a simple report:

1. In the BI Essentials menu, choose Report Builder.

2. Under Visual Report Builder, tap Create Report. Then, do the following:

   a. Tap Add Metric.

   The available metrics can be listed alphabetically or by table.

   ![Visual Report Builder]

   The New Customers metric used in this example counts all customers, and sorts the list by the date the customer signed up for an account. The initial report includes a simple line graph, followed by the table of data.

   b. Choose the metric that describes the set of data that you want to use for the report.

   The summary on the left shows the name of the current metric, followed by the result of any calculations on column data that are specified in the metric. In this example, the summary displays the total customer count.
3. In the chart, hover over each data point on the line. Each data point shows the total number of new customers who signed up during that month.

4. Follow these instructions to group the data, change the date range, and chart type.

**Group By**

The Group By control gives you the ability to add multiple dimensions by group or segment. Dimensions are columns in the table that can be used to group the data.

1. Choose one of the available dimensions from the list of Group By options.

   For this example, the system found five coupon codes that were used by customers while placing their first order.

2. The Group By detail lists each coupon used by customers. The coupons that were used to place the initial order are marked with a checkbox. The chart now has multiple colored lines that represent the each coupon that was used for a first order. The legend is color-coded to correspond to each row of data.

   Click **Apply** to close the Group By detail.
3. Hover over a few data points on each line to see the number of customers during the month who used that coupon while placing their first order.

4. The table of data now has an addition dimension, with a column for each month, and a row for each coupon code.

5. Click the Transpose ( ) control in the upper-right corner of the table to change the orientation of the data.

The axis of the data is flipped, and the table now has a column for each coupon code, and a row for each month. You might find this orientation easier to read.

---

**Multiple Dimensions**

**Group by Table Data**

**Transposed Data**
**Date Range**

The Date Range control shows the current date range and time interval settings, and is located just above the chart to the right.

1. Click the **Date Range** control, which in this example is set to “All-Time by Month.”

2. Make the following changes:
   a. To zoom in for a closer view, change the date range to **Last Full Quarter**.
   b. Under **Select Time Interval**, choose “Week.”
   c. When complete, tap **Save**.

   The report now includes only the data for the last quarter, by week.

**Chart Type**

Click the controls in the upper-right corner to find the best chart for the data.
Some chart types are not compatible with multidimensional data.

- Line graph
- Horizontal Bar
- Horizontal Stacked Bar
- Vertical Bar
- Vertical Stacked Bar
- Pie
- Area
- Funnel

5. To give the report a title, replace the “Untitled Report” text at the top of the page with a descriptive title.

6. In the upper-right corner, tap Save. Then do the following:
   a. For Type, accept the default setting, “Chart.”
   b. Choose the Dashboard where the report is to be available.
   c. Tap Save to Dashboard.
7. To view the chart in a dashboard, do one of the following:

- Click **Go to Dashboard** in the message at the top of the page.
- In the menu, choose **Dashboards**. Click the name of the current dashboard to display the list. Then, click the name of the dashboard where the report was saved.

**Report in Dashboard**

**Filters**

One or more filter(s) can be added to limit the data that is used to product a report. Each filter is an expression that includes a column from the associated table, an operator, and a value. For example to include only repeat customers, you might create a filter that includes only customers who have placed more than one order. Multiple filters can be used with logical “AND/OR” operators to add logic to the report.

A report can have a maximum of 3,500 data points. To reduce the number of data points, use a filter to reduce the amount of data that is used to generate the report.
Magento BI includes a selection of filters that you can use “out of the box,” or modify to suit your needs. There is no limit to the number of filters you can create.

**To add a filter**

1. In the chart, hover over each data point. In this report, each data point shows the total number of customers for the month.

2. In the panel on the left, click the **Filters** icon.

3. Tap **Add Filter**.

Filters are numbered alphabetically, and the first is [A]. The first two parts of the filter are drop-down lists of options, and the third part is a value.
a. Click the first part of the filter, and choose the column that you want to use as the subject of the expression.

![Choose First Part of Filter](image1)

b. Click the second part of the filter, and choose the operator.

![Choose the Operator](image2)

c. In the third part of the filter, enter the value that is needed to complete the expression.
Enter the Value

d. When the filter is complete, tap **Apply**.

The report now includes only repeat customers, and the number of customer records retrieved for the report has been reduced from 33K to 12.6k.

**Filtered Report**

4. In the sidebar, click the **Perspective** ( ) icon.

**Perspective**

5. In the list of settings, choose **Cumulative**. Then, tap **Apply**.
The Cumulative perspective distributes the change over time, rather than showing the jagged up and downs for each month.

6. Enter a Title for the report. Then, Save it as a Chart to your dashboard.

Formulas

A formula combines multiple metrics and mathematical logic to answer a question. For example, how much of the revenue per product during the holiday season was generated by new customers?
Step 1: Create the Basic Report

1. In the menu, choose **Report Builder**.

2. Tap **Add Metric**, and choose the first metric for the report.

   For this example, the “Revenue by products ordered” metric is used.

3. Tap **Add Metric** again, and choose the second metric for the report.

   For this example, the “New Customers” metric is used.

4. In the sidebar, click **Details** to display information about each metric.
5. In the sidebar, click the name of each metric to open the settings page in a new browser tab. Scroll down to see each component of the metric, including the metric query, filter, and dimensions.

6. To return to your report, click the previous browser tab.

7. In the chart, hover over a few data points on each line to see the amounts associated with each metric.
Step 2: Add a Formula

1. At the top of the sidebar, tap **Add Formula**.

   The formula box shows the metrics as available inputs A and B, and includes an input box where you can enter the formula.

   Do the following:

   a. In the **Enter your Formula** input box, enter “A/B”.

      This will divide the revenue by products ordered by the number of new customers.

   b. Set **Select format** to “123Number.”

   c. In the sidebar, replace “Untitled” with a name for the formula.

   ![Formula Settings](image)

2. When complete, tap **Apply**.

   The report now has a new line for the formula, “New Customer Revenue,” and the sidebar shows the total amount of revenue generated by new customers.
Step 3: Add a Date Range

1. Click the **Date Range** control in the upper-right corner.

2. On the **Fixed Date Range** tab, do the following:

   a. On the calendars, choose the date range. 
      For this example, the holiday season is from November 1 through December 31.

   b. Under **Select Time Interval**, choose “Day.”

   c. When complete, click **Apply**.

      The report is now limited to the holiday season, with a data point for each day.
Step 4: Save the Report

In this step, you will save the report as a chart, and also as a table.

1. Click the “Untitled Report” text at the top of the page, and enter a descriptive title. For this example, the report title is “2017 Holiday Sales.”

Then, do the following:

   a. In the upper-right corner, tap Save.
   b. For Type, accept the default setting, “Chart.”
   c. Choose the Dashboard where the report is to be available.
   d. Tap Save to Dashboard.

2. Click the report title, and change the name. For this example, the report title is changed to “2017 Holiday Sales Data”

Then, do the following:

   a. In the upper-right corner, tap Save a Copy.
   b. Set Type to “Table.”
   c. Choose the Dashboard where the report is to be available.
   d. Tap Save a Copy to Dashboard.

3. To see the reports in your dashboard, do one of the following:
   - Click Go to Dashboard in the message at the top of the page.
   - In the menu, choose Dashboards. Click the name of the current dashboard to display the list. Then, click the name of the dashboard where the report was saved.
Manage Data

Manage Data provides access to a variety of tools for managing integrations, report and chart data, dashboards, and exports.

To access Manage Data:

1. In the menu, choose Manage Data.
2. In the sidebar, choose the topic that you want under the following headings:
   - Data Sources
   - Manage Data
   - Export Data
Metrics

Each report includes at least one query that defines the set of data, or “metrics” for the report. The metrics statement describes the data that is to be retrieved, and consists of an operator, column, table, and sorting order. Magento BI includes a set of default, “out of the box” metrics that can be easily customized. You can create an unlimited number of custom metrics.

To access the available metrics:

1. On the menu, choose Manage Data.
2. In the sidebar, choose Metrics.
3. Click the name of any metric to display detailed information. To show the Metric Options, click the Settings (⚙️) icon on the right.
4. Click **Details** to display more information about the metric.

![Metrics](image)

### Default Metrics by Table

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>customer_entity</td>
<td></td>
</tr>
<tr>
<td>Avg first 30 day revenue</td>
<td><strong>Average</strong> on the <em>Customer's first 30 day revenue</em> column in the <em>customer_entity</em> table (Change) ordered by the <em>created_at (use)</em> column</td>
</tr>
<tr>
<td></td>
<td>Filter A: Seconds since customer's first order date &gt;=2592000</td>
</tr>
<tr>
<td></td>
<td>Filter B: Registered accounts we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Avg lifetime coupons</td>
<td><strong>Average</strong> on the <em>Customer's lifetime number of coupons</em> column in the <em>customer_entity</em> table (Change) ordered by the <em>created_at (use)</em> column</td>
</tr>
<tr>
<td></td>
<td>Filter A: Registered accounts we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Avg lifetime orders</td>
<td><strong>Average</strong> on the <em>Customer's lifetime number of orders</em> column in the <em>customer_entity</em> table (Change) ordered by the <em>created_at (use)</em> column</td>
</tr>
<tr>
<td></td>
<td>Filter A: Registered accounts we count (Saved Filter Set)</td>
</tr>
</tbody>
</table>
### Default Metrics by Table (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg Lifetime revenue</td>
<td><strong>Average</strong> on the <strong>Customer's lifetime number of orders</strong> column in the <strong>customer_entity</strong> table (Change) ordered by the <strong>created_at (use)</strong> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Registered accounts we count (Saved Filter Set)</td>
</tr>
<tr>
<td>New Customers</td>
<td><strong>Count</strong> on the <strong>entity_id</strong> column in the <strong>customer_entity</strong> table (Change) ordered by the <strong>created_at (use)</strong> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Registered accounts we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Registered accounts</td>
<td><strong>Count</strong> on the <strong>entity_id</strong> column in the <strong>customer_entity</strong> table (Change) ordered by the <strong>created_at (use)</strong> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Registered accounts we count (Saved Filter Set)</td>
</tr>
<tr>
<td>customer_group</td>
<td><strong>Count</strong> on the <strong>customer_group_id</strong> column in the <strong>customer_group</strong> table (Change) ordered by the <strong>[NONE]</strong> column</td>
</tr>
<tr>
<td>sales_flat_order</td>
<td><strong>Average</strong> on the <strong>base_grand_total</strong> column in the <strong>sales_flat_order</strong> table (Change) ordered by the <strong>created_at (use)</strong> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Avg time between orders</td>
<td><strong>Average</strong> on the <strong>Seconds since previous order</strong> column in the <strong>sales_flat_order</strong> table (Change) ordered by the <strong>created_at (use)</strong> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
</tbody>
</table>
### Default Metrics by Table (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median time between orders</td>
<td><strong>Median</strong> on the Seconds since previous order column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>New Metric 2 (Number of orders)</td>
<td><strong>Count</strong> on the <code>entity_id</code> column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Orders</td>
<td><strong>Count</strong> on the <code>entity_id</code> column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Revenue</td>
<td><strong>Sum</strong> on the <code>base_grand_total</code> column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Shipping</td>
<td><strong>Sum</strong> on the <code>base_shipping_amount</code> column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Tax</td>
<td><strong>Sum</strong> on the <code>base_tax_amount</code> column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Unique Customers</td>
<td><strong>Count Distinct Values</strong> on the <code>customer_email</code> column in the <code>sales_flat_order</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
</tbody>
</table>

**sales_flat_order_item**
## Default Metrics by Table (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Products Ordered</td>
<td>Sum on the <code>qty_ordered</code> column in the <code>sales_flat_order_item</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Ordered products we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Revenue by products ordered</td>
<td>Sum on the <code>Order item total value (quantity * price)</code> column in the <code>sales_flat_order_item</code> table (Change) ordered by the <code>created_at (use)</code> column</td>
</tr>
<tr>
<td>Filter A</td>
<td>Ordered products we count (Saved Filter Set)</td>
</tr>
</tbody>
</table>

## Metric Options

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator</td>
<td>Average</td>
</tr>
<tr>
<td></td>
<td>Count</td>
</tr>
<tr>
<td></td>
<td>Sum</td>
</tr>
<tr>
<td></td>
<td>Average</td>
</tr>
<tr>
<td></td>
<td>Maximum Value</td>
</tr>
<tr>
<td></td>
<td>Minimum Value</td>
</tr>
<tr>
<td></td>
<td>Count Distinct Values</td>
</tr>
<tr>
<td></td>
<td>Median</td>
</tr>
<tr>
<td></td>
<td>First Quartile</td>
</tr>
<tr>
<td></td>
<td>Third Quartile</td>
</tr>
<tr>
<td></td>
<td>Tenth Percentile</td>
</tr>
<tr>
<td></td>
<td>Ninetieth Percentile</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table</th>
<th>addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>categories</td>
</tr>
<tr>
<td></td>
<td>customer_entity</td>
</tr>
<tr>
<td></td>
<td>customer_group</td>
</tr>
<tr>
<td></td>
<td>sales_flat_order</td>
</tr>
<tr>
<td></td>
<td>sales_flat_order_address</td>
</tr>
<tr>
<td></td>
<td>sales_flat_order_item</td>
</tr>
</tbody>
</table>
## Metric Options (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Column by Table</td>
<td></td>
</tr>
<tr>
<td>customer_entity</td>
<td>Customer’s first 30 day revenue</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime number of coupons</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime number of orders</td>
</tr>
<tr>
<td>entity_id</td>
<td>Customer’s lifetime revenue</td>
</tr>
<tr>
<td>group_id</td>
<td>Seconds since customer’s first order date</td>
</tr>
<tr>
<td>customer_group</td>
<td>customer_group_id</td>
</tr>
<tr>
<td>sales_flat_order</td>
<td>base_grand_total</td>
</tr>
<tr>
<td></td>
<td>base_shipping_amount</td>
</tr>
<tr>
<td></td>
<td>base_tax_amount</td>
</tr>
<tr>
<td></td>
<td>billing_address_id</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime number of coupons</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime number of orders</td>
</tr>
<tr>
<td>customer_id</td>
<td>Customer’s lifetime revenue</td>
</tr>
<tr>
<td>entity_id</td>
<td>Number of items in order</td>
</tr>
<tr>
<td></td>
<td>Seconds between customer’s first order date and this order</td>
</tr>
<tr>
<td></td>
<td>Seconds since previous order</td>
</tr>
<tr>
<td>shipping_address_id</td>
<td>store_id</td>
</tr>
<tr>
<td>sales_flat_order_item</td>
<td>base_price</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime number of orders</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime revenue</td>
</tr>
<tr>
<td>item_id</td>
<td>Order item total value (quantity * price)</td>
</tr>
<tr>
<td>order_id</td>
<td>product_id</td>
</tr>
<tr>
<td>qty_ordered</td>
<td></td>
</tr>
<tr>
<td>Order Column</td>
<td>[NONE]</td>
</tr>
<tr>
<td>created_at (use)</td>
<td></td>
</tr>
<tr>
<td>updated_at</td>
<td></td>
</tr>
<tr>
<td>[input] created at</td>
<td></td>
</tr>
</tbody>
</table>
Filter Sets

A filter set is based on a table, and can include multiple statements with logic to select the data for a report or chart. Magento BI includes several default filter sets that you can use “as is” or modify. There is no limit to the number of filter sets that you can create.

A filter set can be applied to any metric that uses the same table. To learn more, see Creating filter sets for metrics in the Magento BI Help Center.

To see the available filter sets:

1. On the menu, choose Manage Data. Then in the sidebar under Manage Data, choose Filter Sets.

2. Click Expand All to display the detail of each filter set that is currently available.

To create a new filter set:

1. In the upper-right corner of the Filter Sets page, tap Create New Filter Set. Then, do the following:
a. Under **Select a Table**, choose the table upon which the filter set is based.

![Select a Table](image)

b. Enter the **Filter Set Name**.

c. Tap **Add Filter**. Then, follow the instructions to build each part of the expression.

![Add Filter](image)

d. To add another filter, tap **Add Filter**. Then, build the expression.

e. To complete the **Filter Logic**, use the AND/OR operators to describe how multiple statements in the filter are to be applied.

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

The new filter appears in the list of Available Filter Sets by Table.

**Default Filters by Table**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>customer_entity</td>
<td>Registered accounts we count (Saved Filter Set)</td>
</tr>
<tr>
<td>created_at</td>
<td>(use) Customer's first 30 day revenue</td>
</tr>
</tbody>
</table>
## Default Filters by Table (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer’s first order’s billing region</td>
<td>Customer’s first order’s coupon code</td>
</tr>
<tr>
<td>Customer’s first order date</td>
<td>Customer’s group code</td>
</tr>
<tr>
<td>Customer’s lifetime number of coupons</td>
<td>Customer’s lifetime number of orders</td>
</tr>
<tr>
<td>Customer’s lifetime revenue</td>
<td>email</td>
</tr>
<tr>
<td>email</td>
<td>entity_id</td>
</tr>
<tr>
<td>entity_id</td>
<td>group_id</td>
</tr>
<tr>
<td>group_id</td>
<td>Seconds since customer’s first order date</td>
</tr>
<tr>
<td>Seconds since customer’s first order date</td>
<td>updated_at</td>
</tr>
<tr>
<td>updated_at</td>
<td>[input] created at</td>
</tr>
<tr>
<td>sales_flat_order</td>
<td>Orders we count (Saved Filter Set)</td>
</tr>
<tr>
<td>Orders we count (Saved Filter Set)</td>
<td>base_grand_total</td>
</tr>
<tr>
<td>base_grand_total</td>
<td>base_shipping_amount</td>
</tr>
<tr>
<td>base_shipping_amount</td>
<td>base_tax_amount</td>
</tr>
<tr>
<td>base_tax_amount</td>
<td>Billing address city</td>
</tr>
<tr>
<td>Billing address city</td>
<td>Billing address country</td>
</tr>
<tr>
<td>Billing address country</td>
<td>Billing address region</td>
</tr>
<tr>
<td>Billing address region</td>
<td>billing_address_id</td>
</tr>
<tr>
<td>billing_address_id</td>
<td>coupon_code</td>
</tr>
<tr>
<td>coupon_code</td>
<td>created_at (use)</td>
</tr>
<tr>
<td>created_at (use)</td>
<td>Customer’s creation date</td>
</tr>
<tr>
<td>Customer’s creation date</td>
<td>Customer’s first order date</td>
</tr>
<tr>
<td>Customer’s first order date</td>
<td>Customer’s group code</td>
</tr>
<tr>
<td>Customer’s group code</td>
<td>Customer’s lifetime number of coupons</td>
</tr>
<tr>
<td>Customer’s lifetime number of coupons</td>
<td>Customer’s lifetime revenue</td>
</tr>
<tr>
<td>Customer’s lifetime revenue</td>
<td>Customer’s order number</td>
</tr>
<tr>
<td>Customer’s order number</td>
<td>Customer’s order number (previous-current)</td>
</tr>
<tr>
<td>Customer’s order number (previous-current)</td>
<td>customer_email</td>
</tr>
<tr>
<td>customer_email</td>
<td>customer_id</td>
</tr>
<tr>
<td>customer_id</td>
<td>entity_id</td>
</tr>
<tr>
<td>entity_id</td>
<td>Is customer’s last order?</td>
</tr>
<tr>
<td>Is customer’s last order?</td>
<td>Number of items in order</td>
</tr>
</tbody>
</table>
Default Filters by Table (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>order_currency_code</td>
<td>Seconds between customer’s first order date and this order</td>
</tr>
<tr>
<td></td>
<td>Seconds since previous order</td>
</tr>
<tr>
<td>sales_flat_order_item</td>
<td>Ordered products we count(Saved Filter Set)</td>
</tr>
<tr>
<td>base_price</td>
<td></td>
</tr>
<tr>
<td>created_at (use)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime number of orders</td>
</tr>
<tr>
<td></td>
<td>Customer’s lifetime revenue</td>
</tr>
<tr>
<td></td>
<td>Customer’s order number</td>
</tr>
<tr>
<td>item_id</td>
<td></td>
</tr>
<tr>
<td>name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Order’s coupon_code</td>
</tr>
<tr>
<td></td>
<td>Order item total value (quantity * price)</td>
</tr>
<tr>
<td>order_id</td>
<td></td>
</tr>
<tr>
<td>product_id</td>
<td></td>
</tr>
<tr>
<td>product_type</td>
<td></td>
</tr>
<tr>
<td>qty_ordered</td>
<td></td>
</tr>
<tr>
<td>sku</td>
<td></td>
</tr>
<tr>
<td>updated_at</td>
<td></td>
</tr>
<tr>
<td>[input] created_at</td>
<td></td>
</tr>
</tbody>
</table>
Export Data

Raw report data can be exported from the Magento BI data warehouse to a CSV or Excel file. You can also create a list of raw, exported data from tables that refreshes every 15 seconds to ensure that the data is always current.

To export report data:

1. In the header of a report, click the Settings (⚙️) control.

2. Choose one of the following options:
   - Full CSV Export
   - Full Excel Export

3. Watch the bottom of the window for the export file. Then, open the file.

To create an export list:

1. On the menu, choose Manage Data.

2. In the sidebar under Export Data, choose Raw Data Export.
3. Tap **Add Export**. Then, do the following:
   a. Choose the **Table**.

   ![Choose Table](image1)

   b. Enter the **Export Name**.

   c. Under **Available Columns**, tap **Add All**.

   ![Choose Columns](image2)

   d. If you want to add a filter, tap **Add Filter**. Then, follow the instructions to create a filter for the exported data.
The filters in this example includes all customers who placed their first order during the 2018 holiday season.

4. When ready, tap **Export Data**.

Look for a message that says the export is successfully queued. The export appears in the list when the process is complete.

5. To download the exported data, tap **Download**. Then, look for the exported zip file at the bottom of the window.
CHAPTER 98: **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:

   ![New Relic Reporting Panel]

   **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 your **Insights API Key**.

3. In the **New Relic Application Name** field, enter a name to identify the configuration for internal reference.

4. Optional, for the **Send Adminhtml and Frontend as Separate Apps** field, select No (default) or Yes to send collected data for the storefront and Admin as separate apps to New Relic. This option requires a name entered for the **New Relic Application Name**.
Enabling this feature reduces the number of false positive New Relic alerts and allows for configured monitoring and alerts strictly for frontend performance. New Relic receives separate app data files with names of Application Name appended to Adminhtml and frontend. For example: MyStore_Adminhtml

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

**Step 4: Enable Cron for New Relic Reporting**

1. Expand ☑️ the **Cron** section.

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 appName = '<your_app_name>' TIMESERIES 2 minutes
```
```sql
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.

```sql
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.

```sql
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.

```sql
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.

```sql
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.

```sql
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.

```sql
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 customer name 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)
```

New Relic Queries

CHAPTER 98: New Relic Reporting

1918

Magento for B2B Commerce User Guide
FROM Transaction SINCE 1 day ago
OPERATIONS
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

All Stores

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

Configuration

Taxes

General Tax Settings
  Cross-Border Price Consistency
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

Currency Configuration
  Currency Symbols
  Updating Currency Rates

Attributes

Customer Attributes
  Address Attributes
  Address Templates
Product Attributes
  Creating an Attribute
  Attribute Sets
CHAPTER 99:
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.

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.

Shipping
Manage the Carrier, Location, Packaging, and Experience profiles for Magento Shipping.
Other Settings

Manage the settings for reward exchange rates, gift wrapping, and gift registries.
CHAPTER 100:
All Stores

When Magento for B2B 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 Diagram]
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.

To create a new store view:

1. On the Admin sidebar, tap Stores. Then under Settings, choose All Stores.

2. Tap Create Store View. Then, do the following:
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.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>ORIGINAL VALUE</th>
<th>UPDATED VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Default Store View</td>
<td>English</td>
</tr>
<tr>
<td>Code</td>
<td>default</td>
<td>english</td>
</tr>
</tbody>
</table>

**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](image-url)
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**.
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 metadata 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.
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

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. Enter a Code in lowercase characters to identify the store. For example: mainstore.
   d. 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.

3. When complete, tap Save 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.

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.

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.

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:
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. Set **Default Store** to the store that is to be used as the default for this website.

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
http://www.yourdomain.com/magento/

Secure Base URL
https://www.yourdomain.com/magento/

URL with IP address
http://###.###.###.###/magento/
https://###.###.###.###/magento/

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.

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)](image)

**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:
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:

   
   ![Enhanced Security Settings]

   a. If you want your store to display only secure http(s) 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**


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.

**Troubleshooting**

If after following the configuration instructions, some pages continue to be served with the unsecure URL (http://), do the following:

- Change the (unsecure) base URL to the secure (https://) URL.
- On the server, edit the .htaccess file (or load balancer) so the unsecure URL is redirected to the secure URL.
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**

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

5. 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**

1. 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>
   ```

2. 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 101:
Configuration

The online Configuration Reference has field descriptions for every configuration setting in Magento for B2B Commerce.

To learn how to apply configuration settings to specific store views, see Scope.

Configuration Tabs

**General**

Includes basic configuration settings for the store, URLs, theme, currency, email addresses, store contacts, editor, and dashboard reports.

For detailed information in the online guide, see General.

**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.

For detailed information in the online guide, see Catalog.
Customers

Establishes basic customer account and login options, newsletter settings, wish list, and the format of auto-generated coupon codes.

For detailed information in the online guide, see Customers.

Sales

Determines checkout and tax settings, payment and shipping options, sales email and PDF print-outs, and Google API settings.

For detailed information in the online guide, see Sales.

Services

Configures Magento API settings, including SOAP and OAuth.

For detailed information in the online guide, see Services.

Advanced

Determines default Admin settings, various system configuration settings, advanced module controls, and developer tools.

For detailed information in the online guide, see Advanced.
CHAPTER 102:

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 how to display 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.
Vertex Cloud

Vertex is a cloud-based solution that automates your sales and use tax compliance, and generates a signature-ready PDF for your monthly returns.

**Automate Tax Calculations & Returns**

Vertex saves time, reduces risk, and helps you file your tax returns on time.

**Sales & Use Tax**

Vertex Cloud calculates sales tax in the shopping cart based on the tax profile of each product that is purchased, and the jurisdiction.

**Manage Exception Certificates**

Vertex makes it easy to manage customers by jurisdiction who have non-standard tax requirements.

**Generate Returns**

Vertex Cloud automatically regenerates signature-ready PDF returns and sends a message when the returns are available.
Your Vertex Account

Vertex offers three pricing plans, plus access to additional services. All Vertex accounts include tiered pricing and award-winning customer support, but without extra fees for fees or annual transaction estimations. Don’t hesitate to contact Vertex if you need help choosing the right pricing plan for your business. Then, sign up for an account on Vertex Cloud.
To sign up for a Vertex account:

1. Visit the Vertex web site to learn more about their services and pricing. Then in the menu at the top of the page, choose Pricing.

2. Choose the pricing plan you want, and tap Request Info.

   Vertex Cloud is available to companies located in the U.S. or Canada.

3. You will receive an email with a link to register your Vertex Cloud account. Click the link, and complete the registration as follows:

   a. Enter your Username, Password, and Password Confirmation.

      Your username and password are case sensitive. Make sure to write them down for future reference.

   b. Complete the fields in the Company Information section.

   c. Complete the fields in the Contact Information section.

   d. To continue, mark the I agree to the terms of service checkbox.

4. Under Subscription Information, choose one of the following Subscription Levels, according to your pricing plan.

   - Standard
   - Professional
   - Premium

   Then, mark the checkbox of any optional features and services that you want to add to your account.

5. Under Billing Information, do the following:

   a. Complete your Billing Address.

      Your company’s billing address is required if paying by credit card, and must be located in either the U.S. or Canada.

   b. Choose the Payment Method that you want to use. Then, complete the required information.

6. To complete the process, tap Submit Billing Information & Finish.

Some of our instructions include links for more information in the Vertex Cloud Help Center. You must be logged in to your account to gain access to the Vertex Cloud Help Center.
See the instructions in the **online user guide** to complete both the Vertex Cloud and Magento configuration.
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:

   a. Set Tax Class for Shipping to the appropriate class. The default classes are:
      - None
      - Taxable Goods

   b. Set Default Tax Class for Product to the appropriate class. The default classes are:
      - None
      - Taxable Goods
c. 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]

   **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 point of origin for your store.

c. Set Catalog Prices to one of the following:
General Tax Settings

1. Excluding Tax
2. Including Tax

**d. Set Shipping Prices** to one of the following:
3. Excluding Tax
4. Including Tax

**e. Set Apply Customer Tax** to one of the following to determine whether tax is applied to the original or discounted price.
5. After Discount
6. Before Discount

**f. Set Apply Discount on Prices** to one of the following to determine if discounts include or exclude tax.
7. Excluding Tax
8. Including Tax

**g. Set Apply Tax On** to one of the following:
9. Custom price if available
10. Original price only

**h. Set Enable Cross-Border Trade** to one of the following:
11. 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.
12. 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.png)

**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:

   ![Price Display Settings]

   **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:
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

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: (Revenue - CustomerVAT - 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](image)

   **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.

**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, tap 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**.
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**.
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.

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.

![Additional Settings](image)

**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.

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.
Adding New Tax Classes

Tax classes for customers and products can be easily added, and then assigned to individual customers and products, and used in tax rules.

To add a new tax class:

1. On the Admin sidebar, choose **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. Tap **Add New Tax Rule**. Then, expand the **Additional Settings** section.
3. To add a new Customer Tax Class, do the following:
   a. Under **Customer Tax Class**, tap **Add New Tax Class**.
   b. Enter the **Name** of the new tax class in the text box. Then, click the checkmark to add the new class to the list of available customer tax classes.
4. To add a new Product Tax Class, do the following:
   
a. Under **Product Tax Class**, tap **Add New Tax Class**.
   
b. Enter the **Name** of the new tax class in the text box. Then, click the checkmark to add the new class to the list of available product tax classes.

![Digital Product Tax Class](image)

5. When complete, tap **Back** in the button bar to return to the Tax Rules grid.
**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.

![Default Tax Destination Calculation](image)

*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 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

<table>
<thead>
<tr>
<th>FPT</th>
<th>DISPLAY SETTING AND CALCULATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Taxed</td>
<td></td>
</tr>
<tr>
<td>Excluding FPT</td>
<td>FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.</td>
</tr>
<tr>
<td>Including FPT</td>
<td>FPT is added to the base price of an item; but is not included in tax-rule-based calculations.</td>
</tr>
<tr>
<td>Excluding FPT, FPT Description, Final Price</td>
<td>Prices appear without FPT amount or description.</td>
</tr>
<tr>
<td>Taxed</td>
<td></td>
</tr>
<tr>
<td>Excluding FPT</td>
<td>FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.</td>
</tr>
<tr>
<td>Including FPT</td>
<td>FPT is included in the price of an item, and no change to tax calculations is required.</td>
</tr>
<tr>
<td>Excluding FPT, FPT Description, Final Price</td>
<td>Prices appear without the FPT amount or description. However, FPT is included in tax-rule-based calculations.</td>
</tr>
</tbody>
</table>
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

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**

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.”
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.

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.
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:

   ![Fixed Product Tax for Belgium](image)

   **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]."

   b. Set **Country/State** to the region where the fixed product tax applies.

   c. Enter the fixed product tax as a decimal amount in the **Tax** field.

   d. 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

**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](image)

   **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](image)

   **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.

To define a new tax rate:

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. Then in the **Range From** and **Range To** fields, enter the first and last ZIP or postal code to define the range.

![Zip/Post is Range](image)

b. Choose the **State** where the tax rate applies.

c. Choose the **Country** where the tax rate applies.

d. Enter the **Rate Percent** that is used for the tax rate calculation.

7. When complete, tap **Save Rate**.

![New Tax Rate](image)

**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

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 a **Field delimiter**, and double quotes as the **Text delimiter**. Then, tap [OK].
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.

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 some cases, you might need to use more than one VAT rate in your store for tax calculation purposes.

Magento can be set up to charge a value-added tax if both the merchant and customer are located in the same EU country. No VAT is charged if the merchant and customer are located in different EU countries.

However, for the sale of downloadable products — or digital goods —, the VAT rate is based on the shipping destination, rather than the merchant location. To learn more, see: EU Place of Supply for Digital Goods.

Magento uses the following fields and configuration settings to address different scenarios.

Summary of VAT Fields

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>MERCHANT INFORMATION</td>
<td></td>
</tr>
<tr>
<td>Stores &gt; Configuration &gt; General &gt; General &gt; Store Information</td>
<td></td>
</tr>
<tr>
<td>Store Information</td>
<td>VAT Number</td>
</tr>
<tr>
<td></td>
<td>The value-added tax number that is assigned to the merchant.</td>
</tr>
<tr>
<td></td>
<td>Validate VAT Number</td>
</tr>
<tr>
<td></td>
<td><strong>VAT validation</strong> confirms that the VAT Number matches the corresponding record in the European Commission database.</td>
</tr>
<tr>
<td>CUSTOMER INFORMATION</td>
<td></td>
</tr>
<tr>
<td>Customers &gt; All Customers &gt; Edit</td>
<td></td>
</tr>
<tr>
<td>Account Information</td>
<td>Tax/VAT Number</td>
</tr>
<tr>
<td></td>
<td>If applicable, the tax number or value-added tax number that is assigned to the customer.</td>
</tr>
<tr>
<td>Addresses</td>
<td>VAT Number</td>
</tr>
<tr>
<td></td>
<td>If applicable, the value-added tax number that is associated with a specific billing or shipping address of the customer. For the sale of digital goods within the EU, the amount of the VAT is based on shipping destination.</td>
</tr>
</tbody>
</table>
Summary of VAT Fields (cont.)

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure &gt; Customers &gt; Customer Configuration</td>
<td></td>
</tr>
<tr>
<td>Create New Account Options</td>
<td></td>
</tr>
<tr>
<td>Show VAT Number on Storefront</td>
<td>Determines if the customer VAT Number field is included in the Address Book that is available in the customer account.</td>
</tr>
<tr>
<td>Default Value for Disable Automatic Group Changes Based on VAT ID</td>
<td>VAT ID is an internal identifier for the VAT Number of the customer when used in VAT Validation. During VAT Validation, Magento confirms that the number matches the European Commission database. Customers can be automatically assigned to one of the four default customer groups based on the validation results.</td>
</tr>
</tbody>
</table>

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 ID 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 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:

<table>
<thead>
<tr>
<th>NEW TAX RATE</th>
<th>SETTINGS</th>
</tr>
</thead>
<tbody>
<tr>
<td>VAT Standard</td>
<td>Tax Identifier:</td>
</tr>
<tr>
<td></td>
<td>Country and State:</td>
</tr>
<tr>
<td></td>
<td>Rate Percent:</td>
</tr>
<tr>
<td>VAT Reduced</td>
<td>Tax Identifier:</td>
</tr>
<tr>
<td></td>
<td>Country and State:</td>
</tr>
<tr>
<td></td>
<td>Rate Percent:</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>NEW TAX RULE</th>
<th>SETTINGS</th>
</tr>
</thead>
</table>
| 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.

![VAT Validation Checkout Workflow Diagram]
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

<table>
<thead>
<tr>
<th>TAX RULE #1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Tax Class</td>
</tr>
<tr>
<td>Customer tax classes must include:</td>
</tr>
<tr>
<td>A class for domestic customers</td>
</tr>
<tr>
<td>A class for customers with invalid VAT ID</td>
</tr>
<tr>
<td>A class for customers, for whom VAT ID validation failed</td>
</tr>
<tr>
<td>Product Tax Class</td>
</tr>
<tr>
<td>Product tax classes must include a class for products of all types, except bundle and virtual.</td>
</tr>
<tr>
<td>Tax Rate</td>
</tr>
<tr>
<td>The tax rate must include the VAT rate of the merchant’s country.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TAX RULE #2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Tax Class</td>
</tr>
<tr>
<td>A class for intra-union customers.</td>
</tr>
<tr>
<td>Product Tax Class</td>
</tr>
<tr>
<td>A class for products of all types, except virtual.</td>
</tr>
<tr>
<td>Tax Rate</td>
</tr>
<tr>
<td>VAT rates for all EU countries, except merchant’s country. Currently this rate is 0%.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TAX RULE #3 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Tax Class</td>
</tr>
<tr>
<td>Customer tax classes must include:</td>
</tr>
<tr>
<td>A class for domestic customers</td>
</tr>
<tr>
<td>A class for customers with invalid VAT ID</td>
</tr>
<tr>
<td>A class for customers, for whom VAT ID validation failed</td>
</tr>
<tr>
<td>Product Tax Class</td>
</tr>
<tr>
<td>A class for virtual products.</td>
</tr>
<tr>
<td>Tax Rate</td>
</tr>
<tr>
<td>VAT rate of the merchant’s country.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Tax Class</td>
</tr>
<tr>
<td>A class for intra-union customers.</td>
</tr>
</tbody>
</table>
TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)

<table>
<thead>
<tr>
<th>Product Tax Class</th>
<th>A class for virtual products.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Rate</td>
<td>VAT rates for all EU countries, except merchant’s country. Currently this rate is 0%.</td>
</tr>
</tbody>
</table>

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.

In the following screenshot, the general customer settings that are not related to VAT Validation are grayed out.

![Create New Account Options](image-url)

---

**Create New Account Options**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Automatic Assignment to Customer Group</td>
<td>Yes</td>
<td>Use system value</td>
</tr>
<tr>
<td>Tax Calculation Based On</td>
<td>Billing Address</td>
<td>Use system value</td>
</tr>
<tr>
<td>Default Group</td>
<td>General</td>
<td>Use system value</td>
</tr>
<tr>
<td>Group for Valid VAT ID - Domestic</td>
<td>Please Select</td>
<td>Use system value</td>
</tr>
<tr>
<td>Group for Valid VAT ID - Intra-Union</td>
<td>Please Select</td>
<td>Use system value</td>
</tr>
<tr>
<td>Group for Invalid VAT ID</td>
<td>Please Select</td>
<td>Use system value</td>
</tr>
<tr>
<td>Validation Error Group</td>
<td>Please Select</td>
<td>Use system value</td>
</tr>
<tr>
<td>Validate on Each Transaction</td>
<td>No</td>
<td>Use system value</td>
</tr>
<tr>
<td>Default Value for Disable Automatic Group Changes Based on VAT ID</td>
<td>Yes</td>
<td>Use system value</td>
</tr>
<tr>
<td>Show VAT Number on Storefront</td>
<td>No</td>
<td>Use system value</td>
</tr>
</tbody>
</table>

To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.
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 Storefront

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

**Step 4: Set Your VAT ID and Location Country**

1. In the Configuration panel on the left under **General**, choose **General**.
2. Expand the **Store Information** section. Then, do the following:
   
   ![Store Information](image)

   **Store Information**

   a. Select your **Country**.
   
   b. Enter your **VAT Number**. Then, tap **Validate VAT Number**. The result appears immediately.
3. 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.
2. In the list of **European Union Countries**, verify that each member country of the EU is selected.
To change the default setting, clear the **Use system values** checkbox. Then, hold down the **Ctrl** key, and click each country that you want to add, or remove.

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

<table>
<thead>
<tr>
<th>SETTING</th>
<th>CALCULATION AND DISPLAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit Price</td>
<td>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.</td>
</tr>
<tr>
<td>Row Total</td>
<td>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.</td>
</tr>
<tr>
<td>Total</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>SETTING</th>
<th>CALCULATION AND DISPLAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excluding Tax</td>
<td>Using this setting, the base item price is used as it is entered and the tax calculation methods are applied.</td>
</tr>
<tr>
<td>Including Tax</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DISPLAY</th>
<th>CALCULATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excluding Tax</td>
<td>Appears without tax.</td>
<td>Normal calculation. Shipping is added to cart total, typically displayed as a separate item.</td>
</tr>
<tr>
<td>Including Tax</td>
<td>Can be tax inclusive, or tax can be displayed separately.</td>
<td>Shipping is treated as another item in cart with taxes, using the same calculations.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>TAX OPTION</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load catalog prices</td>
<td>Excluding tax</td>
</tr>
<tr>
<td>FPT</td>
<td>No, because FPT is not taxed.</td>
</tr>
<tr>
<td>Tax based on</td>
<td>Shipping origin</td>
</tr>
<tr>
<td>Tax Calculation</td>
<td>On total</td>
</tr>
<tr>
<td>Tax shipping?</td>
<td>No</td>
</tr>
<tr>
<td>Apply Discount</td>
<td>Before tax</td>
</tr>
<tr>
<td>Comment</td>
<td>All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.</td>
</tr>
</tbody>
</table>

## UK B2C Tax Configuration

<table>
<thead>
<tr>
<th>TAX OPTION</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load catalog prices</td>
<td>Excluding tax</td>
</tr>
<tr>
<td>FPT</td>
<td>Yes, including FPT and description</td>
</tr>
<tr>
<td>Tax based on</td>
<td>Shipping address</td>
</tr>
<tr>
<td>Tax Calculation</td>
<td>On total</td>
</tr>
<tr>
<td>Tax shipping?</td>
<td>Yes</td>
</tr>
<tr>
<td>Apply Discount</td>
<td>Before tax, discount on prices, including tax.</td>
</tr>
<tr>
<td>Comment</td>
<td>For merchants marking up supplier invoices (including VAT).</td>
</tr>
</tbody>
</table>

## U.K. B2B Tax Configuration

<table>
<thead>
<tr>
<th>TAX OPTION</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load catalog prices</td>
<td>Excluding tax</td>
</tr>
<tr>
<td>FPT</td>
<td>Yes, including FPT and description</td>
</tr>
<tr>
<td>Tax based on</td>
<td>Shipping address</td>
</tr>
<tr>
<td>Tax Calculation</td>
<td>On item</td>
</tr>
</tbody>
</table>
U.K. B2B Tax Configuration (cont.)

<table>
<thead>
<tr>
<th>TAX OPTION</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax shipping?</td>
<td>Yes</td>
</tr>
<tr>
<td>Apply Discount</td>
<td>Before tax, discount on prices, including tax.</td>
</tr>
<tr>
<td>Comment</td>
<td>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.</td>
</tr>
</tbody>
</table>

Canada Tax Configuration

<table>
<thead>
<tr>
<th>TAX OPTION</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load catalog prices</td>
<td>Excluding tax</td>
</tr>
<tr>
<td>FPT</td>
<td>Yes, including FPT, description, and apply tax to FPT.</td>
</tr>
<tr>
<td>Tax based on</td>
<td>Shipping origin</td>
</tr>
<tr>
<td>Tax Calculation</td>
<td>On total</td>
</tr>
<tr>
<td>Tax shipping?</td>
<td>Yes</td>
</tr>
<tr>
<td>Apply Discount</td>
<td>Before tax</td>
</tr>
<tr>
<td>Comment</td>
<td>Merchants located in a GST/PST province (Montreal) should create one tax rule and show a combined tax amount. 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: Revenu Québec Government of Saskatchewan Manitoba Information for Vendors</td>
</tr>
</tbody>
</table>
U.S. Tax Guidelines

These recommended settings can be used for most tax configurations for stores within the United States.

**Tax Classes**

<table>
<thead>
<tr>
<th>TAX CLASS</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Class for Shipping</td>
<td>None</td>
</tr>
</tbody>
</table>

**Calculation Settings**

<table>
<thead>
<tr>
<th>CALCULATION</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Calculation Method Based On</td>
<td>Total</td>
</tr>
<tr>
<td>Tax Calculation Based On</td>
<td>Shipping Origin</td>
</tr>
<tr>
<td>Catalog Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Shipping Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Apply Customer Tax</td>
<td>After Discount</td>
</tr>
<tr>
<td>Apply Discount on Prices</td>
<td>Excluding Tax</td>
</tr>
</tbody>
</table>

**Default Tax Destination Calculation**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Country</td>
<td>United States</td>
</tr>
<tr>
<td>Default State</td>
<td>State where business is located.</td>
</tr>
<tr>
<td>Default Post Code</td>
<td>The postal code that is used in your tax zones.</td>
</tr>
</tbody>
</table>

**Price Display Settings**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Product Prices in Catalog</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Display Shipping Prices</td>
<td>Excluding Tax</td>
</tr>
</tbody>
</table>

**Shopping Cart Display Settings**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Display Subtotal</td>
<td>Excluding Tax</td>
</tr>
</tbody>
</table>
### Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Recommended Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Shipping Amount</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Display Gift Wrapping Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Display Printed Card Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Include Tax in Grand Total</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Full Tax Summary</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Zero Tax Subtotal</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Orders, Invoices, Credit Memos, Display Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Recommended Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Display Subtotal</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Display Shipping Amount</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Include Tax in Grand Total</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Full Tax Summary</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Zero Tax Subtotal</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Fixed Product Taxes

<table>
<thead>
<tr>
<th>Setting</th>
<th>Recommended Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable FPT</td>
<td>No, except in California.</td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Calculation Method Based On</td>
<td>Total</td>
</tr>
<tr>
<td>Tax Calculation Based On</td>
<td>Shipping Address</td>
</tr>
<tr>
<td>Catalog Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Shipping Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Apply Customer Tax</td>
<td>After Discount</td>
</tr>
<tr>
<td>Apply Discount on Prices</td>
<td>Excluding Tax</td>
</tr>
<tr>
<td>Apply Tax On</td>
<td>Custom Price (if available)</td>
</tr>
</tbody>
</table>
### Tax Classes

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Class for Shipping</td>
<td>Shipping (shipping is taxed)</td>
</tr>
</tbody>
</table>

### Default Tax Destination Calculation

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Country</td>
<td>Canada</td>
</tr>
<tr>
<td>Default State</td>
<td>(as appropriate)</td>
</tr>
<tr>
<td>Default Postal Code</td>
<td>* (asterisk)</td>
</tr>
</tbody>
</table>

### Shopping Cart Display Settings

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include Tax in Grand Total</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Full Tax Summary</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Zero in Tax Subtotal</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Fixed Product Taxes

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable FPT</td>
<td>Yes</td>
</tr>
<tr>
<td>All FPT Display Settings</td>
<td>Including FPT and FPT description</td>
</tr>
<tr>
<td>Apply Discounts to FPT</td>
<td>No</td>
</tr>
<tr>
<td>Apply Tax to FPT</td>
<td>Yes</td>
</tr>
<tr>
<td>Include FPT in Subtotal</td>
<td>No</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Identifier</td>
<td>Canada-GST</td>
</tr>
<tr>
<td>Country</td>
<td>Canada</td>
</tr>
<tr>
<td>State</td>
<td>* (asterisk)</td>
</tr>
<tr>
<td>Zip/Post is Range</td>
<td>No</td>
</tr>
<tr>
<td>Zip/Post Code</td>
<td>* (asterisk)</td>
</tr>
<tr>
<td>Rate Percent</td>
<td>5.0000</td>
</tr>
</tbody>
</table>

Step 3: **Set Up Canadian Provincial Sales Tax (PST)**

Set up another tax rate for the applicable province.

### Tax Rate Information

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Identifier</td>
<td>Canada-SK-PST</td>
</tr>
<tr>
<td>Country</td>
<td>Canada</td>
</tr>
<tr>
<td>State</td>
<td>Saskatchewan</td>
</tr>
<tr>
<td>Zip/Post is Range</td>
<td>No</td>
</tr>
<tr>
<td>Zip/Post Code</td>
<td>* (asterisk)</td>
</tr>
<tr>
<td>Rate Percent</td>
<td>5.0000</td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Retail-Canada-GST</td>
</tr>
<tr>
<td>Customer Tax Class</td>
<td>Retail Customer</td>
</tr>
<tr>
<td>Product Tax Class</td>
<td>Taxable Goods</td>
</tr>
<tr>
<td></td>
<td>Shipping</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>Canada-GST</td>
</tr>
<tr>
<td>Priority</td>
<td>0</td>
</tr>
<tr>
<td>Calculate off subtotal only</td>
<td>Select this checkbox.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>0</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Retail-Canada-PST</td>
</tr>
<tr>
<td>Customer Tax Class</td>
<td>Retail Customer</td>
</tr>
<tr>
<td>Product Tax Class</td>
<td>Taxable Goods</td>
</tr>
<tr>
<td></td>
<td>Shipping</td>
</tr>
<tr>
<td>Tax Rate</td>
<td>Canada-SK-PT</td>
</tr>
<tr>
<td>Priority</td>
<td>1</td>
</tr>
<tr>
<td>Calculate off subtotal only</td>
<td>Select this checkbox.</td>
</tr>
<tr>
<td>Sort Order</td>
<td>0</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>TAX RATE</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>France-StandardVAT</td>
<td>Country: France</td>
</tr>
<tr>
<td></td>
<td>State/Region: *</td>
</tr>
<tr>
<td></td>
<td>ZIP/Postal Code: *</td>
</tr>
<tr>
<td></td>
<td>Rate: 20%</td>
</tr>
<tr>
<td>France-ReducedVAT</td>
<td>Country: France</td>
</tr>
<tr>
<td></td>
<td>State/Region: *</td>
</tr>
<tr>
<td></td>
<td>ZIP/Postal Code: *</td>
</tr>
<tr>
<td></td>
<td>Rate: 5%</td>
</tr>
<tr>
<td>Germany-StandardVAT</td>
<td>Country: Germany</td>
</tr>
<tr>
<td></td>
<td>State/Region: *</td>
</tr>
<tr>
<td></td>
<td>ZIP/Postal Code: *</td>
</tr>
<tr>
<td></td>
<td>Rate: 19%</td>
</tr>
<tr>
<td>Germany-ReducedVAT</td>
<td>Country: Germany</td>
</tr>
<tr>
<td></td>
<td>State/Region: *</td>
</tr>
<tr>
<td></td>
<td>ZIP/Postal Code: *</td>
</tr>
<tr>
<td></td>
<td>Rate: 7%</td>
</tr>
</tbody>
</table>
Step 3: **Set Up the Tax Rules**
Create the following tax rules:

**Tax Rules**

<table>
<thead>
<tr>
<th>TAX RULE</th>
<th>SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail-France-StandardVAT</td>
<td>Customer Class: Retail Customer</td>
</tr>
<tr>
<td></td>
<td>Tax Class: VAT-Standard</td>
</tr>
<tr>
<td></td>
<td>Tax Rate: France-StandardVAT</td>
</tr>
<tr>
<td></td>
<td>Priority: 0</td>
</tr>
<tr>
<td></td>
<td>Sort Order: 0</td>
</tr>
<tr>
<td>Retail-France-ReducedVAT</td>
<td>Customer Class: Retail Customer</td>
</tr>
<tr>
<td></td>
<td>Tax Class: VAT Reduced</td>
</tr>
<tr>
<td></td>
<td>Tax Rate: France-ReducedVAT</td>
</tr>
<tr>
<td></td>
<td>Priority: 0</td>
</tr>
<tr>
<td></td>
<td>Sort Order: 0</td>
</tr>
<tr>
<td>Retail-Germany-StandardVAT</td>
<td>Customer Class: Retail Customer</td>
</tr>
<tr>
<td></td>
<td>Tax Class: VAT-Standard</td>
</tr>
<tr>
<td></td>
<td>Tax Rate: Germany-StandardVAT</td>
</tr>
<tr>
<td></td>
<td>Priority: 0</td>
</tr>
<tr>
<td></td>
<td>Sort Order: 0</td>
</tr>
<tr>
<td>Retail-Germany-ReducedVAT</td>
<td>Customer Class: Retail Customer</td>
</tr>
<tr>
<td></td>
<td>Tax Class: VAT-Reduced</td>
</tr>
<tr>
<td></td>
<td>Tax Rate: Germany-ReducedVAT</td>
</tr>
<tr>
<td></td>
<td>Priority: 0</td>
</tr>
<tr>
<td></td>
<td>Sort Order: 0</td>
</tr>
</tbody>
</table>
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.
   b. In the upper-left corner, set Default Config to the French store.
   c. On the General page, expand Countries Options section, and set the default country to “France.”
   d. 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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX CLASSES</td>
<td></td>
</tr>
<tr>
<td>Tax Class for Shipping</td>
<td>Shipping (shipping is taxed)</td>
</tr>
<tr>
<td>CALCULATION SETTINGS</td>
<td></td>
</tr>
<tr>
<td>Tax Calculation Method Based On</td>
<td>Total</td>
</tr>
<tr>
<td>Tax Calculation Based On</td>
<td>Shipping Address</td>
</tr>
<tr>
<td>Catalog Prices</td>
<td>Including Tax</td>
</tr>
<tr>
<td>Shipping Prices</td>
<td>Including Tax</td>
</tr>
<tr>
<td>Apply Customer Tax</td>
<td>After Discount</td>
</tr>
<tr>
<td>Apply Discount on Prices</td>
<td>Including Tax</td>
</tr>
</tbody>
</table>
General Settings (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Tax On</td>
<td>Custom Price (if available)</td>
</tr>
</tbody>
</table>

**DEFAULT TAX DESTINATION CALCULATION**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Country</td>
<td>France</td>
</tr>
<tr>
<td>Default State</td>
<td></td>
</tr>
<tr>
<td>Default Postal Code</td>
<td>* (asterisk)</td>
</tr>
</tbody>
</table>

**SHOPPING CART DISPLAY SETTINGS**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include Tax in Grand Total</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**FIXED PRODUCT TAXES**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable FPT</td>
<td>Yes</td>
</tr>
<tr>
<td>All FPT Display Settings</td>
<td>Including FPT and FPT description</td>
</tr>
<tr>
<td>Apply Discounts to FPT</td>
<td>No</td>
</tr>
<tr>
<td>Apply Tax to FPT</td>
<td>Yes</td>
</tr>
<tr>
<td>Include FPT in Subtotal</td>
<td>Yes</td>
</tr>
</tbody>
</table>
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.

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

<table>
<thead>
<tr>
<th>PRICE DISPLAY</th>
<th>UNIT PRICE</th>
<th>ROW TOTAL</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Class for Shipping</td>
<td>Shipping (is taxed)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Excluding tax</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td>Including tax</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td>Including and Excluding tax</td>
<td>OK</td>
<td>OK</td>
<td>Warning</td>
</tr>
</tbody>
</table>

### Catalog Prices: Including Tax

#### Tax Included

<table>
<thead>
<tr>
<th>PRICE DISPLAY</th>
<th>UNIT PRICE</th>
<th>ROW TOTAL</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excluding tax</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td>Including tax</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td>Including and Excluding tax</td>
<td>OK</td>
<td>Warning</td>
<td>Warning</td>
</tr>
</tbody>
</table>
Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

**Recommended Settings**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>RECOMMENDED SETTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Customer Tax</td>
<td>After Discount</td>
</tr>
<tr>
<td>Apply Discount on Prices</td>
<td>US and Canada: Excluding Tax</td>
</tr>
<tr>
<td></td>
<td>EU: Including Tax</td>
</tr>
</tbody>
</table>

Calculation Settings

Warning Messages

CHAPTER 102: Taxes
CHAPTER 103:

Currency

Magento for B2B 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](image)

**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 upper-right corner, set Store View to the store view where the configuration applies.
3. In the panel on the left under General, choose Currency Setup.
4. 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 the store view.
   c. In the Allowed Currencies list, select all currencies that you accept as payment in the store view. Make sure to also select your primary currency. (For multiple currencies, hold down the Ctrl key and select each option.)

5. 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.
6. 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.”
**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](image)

**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.
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.

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.
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.

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.
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 104: 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.

To learn more about creating and managing product attributes, see:

- Product Attributes
- Attribute Sets

To learn more about importing and exporting attributes, see:

- Data Transfer
- Using Product Attributes
- Product Attribute Reference
- Customer Attribute Reference
Customer Attributes

Customer attributes provide the information that is 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.

Step 1: Complete the Attribute Properties

1. On the Admin sidebar, tap Stores. Then under Attributes, choose Customer.
2. In the upper-right corner, tap Add New Customer.
3. 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.

4. Complete the following:
Data Entry Properties

a. To determine the type of input control that is used for data entry, set Input Type to one of the following:
   - Text Field
   - Text Area
   - Multiple Line
   - Date
   - Dropdown
   - Multiple Select
   - Yes/No
   - File (attachment)
   - Image File

b. If the customer must enter a value in the field, set Values Required to “Yes.”

c. To assign an initial value to the field, enter a Default Value.

d. To check the data entered into the field for accuracy before the record is saved, set Input Validation to the type of data to be allowed in the field. The available values depend on the Input Type specified.

   None
   - The field has no input validation during data entry.

   Alphanumeric
   - Accepts any combination of numbers (0-9) and alphabetic characters (a-z, A-Z) during data entry. To include special characters, see Escape HTML Entities.

   Numeric Only
   - Accepts only numbers (0-9) during data entry.

   Alpha Only
   - Accepts only alphabetic characters (a-z, A-Z) during data entry.

   URL
   - Accepts only a URL during data entry.

   Email
   - Accepts only an email address during data entry.

   Length Only
   - Validates the input based on the length of the data entered into the field.

e. To limit the size of Text Field and Text Area input types, enter the Minimum Text Length and Maximum Text Length.

f. To apply a preprocessing filter to values entered in 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 `&amp;`. 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.

**Customers Grid and Segment Properties**

a. To be able to include the column in the Customers grid, set **Add to Column Options** to “Yes.”

b. To filter the Customers grid by this attribute, set **Use in Filter Options** to “Yes.”

c. To search the Customers grid by this attribute, set **Use in Search Options** to “Yes.”

d. 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

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**.
### Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ATTRIBUTE PROPERTIES</strong></td>
<td></td>
</tr>
<tr>
<td>Default Label</td>
<td>The default label that identifies the attribute in the Admin and storefront.</td>
</tr>
<tr>
<td>Attribute Code</td>
<td>A unique code that identifies the attribute within the system. The code can be up to 21 characters in length, and cannot include spaces or special characters. The underscore symbol can be used instead of a space.</td>
</tr>
<tr>
<td>Input Type</td>
<td>Determines the input control that is used for data entry. Options:</td>
</tr>
<tr>
<td>Text Field</td>
<td>A single-line text field.</td>
</tr>
<tr>
<td>Text Area</td>
<td>A multi-line text area.</td>
</tr>
<tr>
<td>Multiple Line</td>
<td>Creates multiple text lines for the attribute, similar to a multi-line street address. The number of separate data entry lines can be from 2 to 20. Additional property:</td>
</tr>
<tr>
<td></td>
<td>Default Value</td>
</tr>
<tr>
<td></td>
<td>Specifies the initial value of the field.</td>
</tr>
<tr>
<td>Date</td>
<td>Displays a date field with a pop-up calendar. Additional properties:</td>
</tr>
<tr>
<td></td>
<td>Default Value</td>
</tr>
<tr>
<td></td>
<td>Sets a default date.</td>
</tr>
<tr>
<td></td>
<td>Minimal Value</td>
</tr>
<tr>
<td></td>
<td>Determines the earliest date that can be entered.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Value</td>
<td>Determines the latest date that can be entered.</td>
</tr>
<tr>
<td>Related properties:</td>
<td></td>
</tr>
<tr>
<td>Input Validation Date</td>
<td></td>
</tr>
<tr>
<td>Input/Output Filter</td>
<td>Normalize Date</td>
</tr>
<tr>
<td>Dropdown</td>
<td>A drop-down list that accepts only one value to be selected.</td>
</tr>
<tr>
<td>Multiple Select</td>
<td>A drop-down list that accepts multiple values to be selected. To select more than one value, hold down the Ctrl key, and click each option.</td>
</tr>
<tr>
<td>Yes/No</td>
<td>A field that offers only a choice of “Yes” or “No” values.</td>
</tr>
<tr>
<td>File (attachment)</td>
<td>A field that allows a file to be uploaded, and associated with the customer attribute as an attachment.</td>
</tr>
<tr>
<td>Image File</td>
<td>A field that allows an image to be uploaded to the gallery, and associated with the customer attribute.</td>
</tr>
</tbody>
</table>

**Values Required**

Determines if a value must be entered into the field. Options: Yes/No

**Default Value**

Specifies the initial value of the attribute.

**Input Validation**

The selection of options is determined by the input type. Options:

- None: The field has no input validation during data entry.
- Alphanumeric: Accepts any combination of numbers (0-9) and alphabetic characters (a-z, A-Z) during data entry.
- Numeric Only: Accepts only numbers (0-9) during data entry.
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpha Only</td>
<td>Accepts only alphabetic characters (a-z, A-Z) during data entry.</td>
</tr>
<tr>
<td>URL</td>
<td>Accepts only a URL during data entry.</td>
</tr>
<tr>
<td>Email</td>
<td>Accepts only an email address during data entry.</td>
</tr>
<tr>
<td>Length Only</td>
<td>Validates the input based on the length of the data entered into the field.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Text Length</th>
<th>Determines the minimum number of characters or numbers that can be entered into the field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Text Length</td>
<td>Determines the maximum number of characters or numbers that can be entered into the field.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Input/Output Filter</th>
<th>Applies a preprocessing filter to values entered in a text field, text area, or multiple line input type before the record is saved. Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Does not apply a filter to text entered into the field.</td>
</tr>
<tr>
<td>Strip HTML Tags</td>
<td>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.</td>
</tr>
<tr>
<td>Escape HTML Entities</td>
<td>Converts special characters found in the text to a valid HTML escape sequence, such as &amp;: You can use this filter to clean up special characters that might be pasted into database fields from a word processor. 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 (&lt;) and greater than (&gt;) symbols, and the ampersand character which are also used in the code.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to Column Options</td>
<td>Specifies if the attribute is included as a column in the Customers grid. Options: Yes/No</td>
</tr>
<tr>
<td>Use in Filter Options</td>
<td>Specifies if the attribute can be used as a filter for search operations from the grid. Options: Yes/No</td>
</tr>
<tr>
<td>Use in Search Options</td>
<td>Specifies if the attribute value can be used as a keyword in search operations. Options: Yes/No</td>
</tr>
<tr>
<td>Use in Customer Segment</td>
<td>Determines if the attribute is included in customer segment conditions. Options: Yes/No</td>
</tr>
</tbody>
</table>

### STOREFRONT PROPERTIES

| Show on Storefront         | Determines if the attribute appears as a field in the customer information in the storefront. Options: Yes/No                               |
| Sort Order                 | Specifies the sort order of this attribute in relation to other customer attributes. The sort order determines the sequence that fields receive focus during data entry when using keyboard navigation. |
| Forms to Use in            | Determines the pages with data entry forms where the attribute appears. Hold down the Ctrl key to choose multiple forms. Options:        |

- Customer Registration
- Customer Account Edit
- Admin Checkout

### Default Customer Attributes

<table>
<thead>
<tr>
<th>ATTRIBUTE CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>created_at</td>
<td>The date the customer account was created.</td>
</tr>
<tr>
<td>updated_at</td>
<td>The date the customer account was last updated.</td>
</tr>
<tr>
<td>website_id</td>
<td>The website ID of the site where the customer account was created.</td>
</tr>
<tr>
<td>created_in</td>
<td>The store view where the account was created.</td>
</tr>
<tr>
<td>group_id</td>
<td>The ID of the customer group where the customer is assigned.</td>
</tr>
<tr>
<td>disable_auto_group_</td>
<td>Determines if customer groups can be dynamically assigned during VAT ID</td>
</tr>
<tr>
<td>change</td>
<td>validation.</td>
</tr>
</tbody>
</table>


## Default Customer Attributes (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>prefix</td>
<td>Any prefix that is used with the customer name. (Mr., Ms., Mrs., Dr., etc.)</td>
</tr>
<tr>
<td>firstname</td>
<td>The first name of the customer.</td>
</tr>
<tr>
<td>middlename</td>
<td>The middle name or middle initial of the customer.</td>
</tr>
<tr>
<td>lastname</td>
<td>The last name of the customer.</td>
</tr>
<tr>
<td>suffix</td>
<td>Any suffix that is used with the customer name. (Jr., Sr., Esquire, etc.)</td>
</tr>
<tr>
<td>email</td>
<td>The customer's email address.</td>
</tr>
<tr>
<td>dob</td>
<td>The customer's date of birth.</td>
</tr>
<tr>
<td>taxvat</td>
<td>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.</td>
</tr>
<tr>
<td>gender</td>
<td>The customer's gender.</td>
</tr>
</tbody>
</table>
Customer Address Attributes

The Customer Address Attribute determines the properties of street addresses that are entered into the address book from the customer's account, or during checkout.

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 are used in the following forms:

- Customer Address Registration
- Customer Account Address

---

**Step 1: Complete the Attribute Properties**

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Customer Address**.
2. In the upper-right corner, tap **Add New Attribute**.
3. 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.

4. Complete the following:
Data Entry Properties

a. To determine the type of input control that is used for data entry, set Input Type to one of the following:
   - Text Field
   - Text Area
   - Multiple Line
   - Date
   - Dropdown
   - Multiple Select
   - Yes/No
   - File (attachment)
   - Image File

b. If the customer must enter a value in the field, set Values Required to “Yes.”

c. To assign an initial value to the field, enter a Default Value.

d. To check the data entered into the field for accuracy before the record is saved, set Input Validation to the type of data to be allowed in the field. The available values depend on the Input Type specified.

<table>
<thead>
<tr>
<th>None</th>
<th>The field has no input validation during data entry.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alphanumeric</td>
<td>Accepts any combination of numbers (0-9) and alphabetic characters (a-z, A-Z) during data entry. To include special characters, see Escape HTML Entities.</td>
</tr>
<tr>
<td>Alphanumeric with Space</td>
<td>Accepts any combination of numbers (0-9), alphabetic characters (a-z, A-Z), and spaces during data entry.</td>
</tr>
<tr>
<td>Numeric Only</td>
<td>Accepts only numbers (0-9) during data entry.</td>
</tr>
<tr>
<td>Alpha Only</td>
<td>Accepts only alphabetic characters (a-z, A-Z) during data entry.</td>
</tr>
<tr>
<td>URL</td>
<td>Accepts only a URL during data entry.</td>
</tr>
<tr>
<td>Email</td>
<td>Accepts only an email address during data entry.</td>
</tr>
<tr>
<td>Length Only</td>
<td>Validates the input based on the length of the data entered into the field.</td>
</tr>
</tbody>
</table>

e. To apply a preprocessing filter to values entered in 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 &amp;. You can use this filter to clean up special characters that might be pasted into database fields from a word processor.

Customers Grid and Segment Properties

a. To be able to include the column in the Customers grid, set Add to Column Options to “Yes.”
b. To filter the Customers grid by this attribute, set Use in Filter Options to “Yes.”
c. To search the Customers grid by this attribute, set Use in Search Options to “Yes.”
d. 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 Address Registration
   - Customer Account Address
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.

Field Descriptions

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Properties</td>
<td></td>
</tr>
<tr>
<td>Default Label</td>
<td>The default label that identifies the attribute in the Admin and storefront.</td>
</tr>
<tr>
<td>Attribute Code</td>
<td>A unique code that identifies the attribute within the system. The code can be up to 21 characters in length, and cannot include spaces or special characters. The underscore symbol can be used instead of a space.</td>
</tr>
<tr>
<td>Input Type</td>
<td>Determines the input control that is used for data entry. Options:</td>
</tr>
<tr>
<td>Text Field</td>
<td>A single-line text field.</td>
</tr>
<tr>
<td>Text Area</td>
<td>A multi-line text area.</td>
</tr>
<tr>
<td>Multiple Line</td>
<td>Creates multiple text lines for the attribute, similar to a multi-line street address. The number of separate data entry lines can be from 2 to 20. Additional property:</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Value</td>
<td>Specifies the initial value of the attribute.</td>
</tr>
<tr>
<td>Date</td>
<td>Displays a date field with a pop-up calendar. Additional properties: Default Value sets a default date. Minimal Value determines the earliest date that can be entered. Maximum Value determines the latest date that can be entered. Related properties: Input Validation Date Input/Output Filter Normalize Date</td>
</tr>
<tr>
<td>Dropdown</td>
<td>A drop-down list that accepts only one value to be selected.</td>
</tr>
<tr>
<td>Multiple Select</td>
<td>A drop-down list that accepts multiple values to be selected. To select more than one value, hold down the Ctrl key, and click each option.</td>
</tr>
<tr>
<td>Yes/No</td>
<td>A field that offers only a choice of “Yes” or “No” values.</td>
</tr>
<tr>
<td>File (attachment)</td>
<td>A field that allows a file to be uploaded, and associated with the customer attribute as an attachment.</td>
</tr>
<tr>
<td>Image File</td>
<td>A field that allows an image to be uploaded to the gallery, and associated with the customer attribute.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Values Required</th>
<th>Determines if a value must be entered into the field. Options: Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Value</td>
<td>Specifies the initial value of the attribute.</td>
</tr>
<tr>
<td>Input Validation</td>
<td>The selection of options is determined by the input type. Options:</td>
</tr>
</tbody>
</table>
## Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>The field has no input validation during data entry.</td>
</tr>
<tr>
<td>Alphanumeric</td>
<td>Accepts any combination of numbers (0-9) and alphabetic characters (a-z, A-Z) during data entry.</td>
</tr>
<tr>
<td>Alphanumeric with Space</td>
<td>Allows spaces in the street address to comply with maximum length requirements of carrier. During checkout, the customer can enter any combination of numbers (0-9), alphabetic characters (a-z, A-Z), and spaces in the street address of the recipient and sender. Any extra spaces are trimmed when the address is saved.</td>
</tr>
<tr>
<td>Numeric Only</td>
<td>Accepts only numbers (0-9) during data entry.</td>
</tr>
<tr>
<td>Alpha Only</td>
<td>Accepts only alphabetic characters (a-z, A-Z) during data entry.</td>
</tr>
<tr>
<td>URL</td>
<td>Accepts only a URL during data entry.</td>
</tr>
<tr>
<td>Email</td>
<td>Accepts only an email address during data entry.</td>
</tr>
<tr>
<td>Length Only</td>
<td>Validates the input based on the length of the data entered into the field.</td>
</tr>
</tbody>
</table>

**Input/Output Filter**

Applies a preprocessing filter to values entered in a text field, text area, or multiple line input type before the record is saved. Options:

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Does not apply a filter to text entered into the field.</td>
</tr>
<tr>
<td>Strip HTML Tags</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Escape HTML Entities</td>
<td>Converts special characters found in the text to a valid HTML escape sequence, such as &amp; ;. You can use this filter to clean up special characters that might be pasted into database fields from a word processor. 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 (&lt;) and greater than (&gt;) symbols, and the ampersand character which are also used in the code.</td>
</tr>
</tbody>
</table>

| Add to Column Options              | Specifies if the attribute is included as a column in the Customers grid. Options: Yes/No                                                                                                                     |
| Use in Filter Options              | Specifies if the attribute can be used as a filter for search operations from the grid. Options: Yes/No                                                                                                    |
| Use in Search Options              | Specifies if the attribute value can be used as a keyword in search operations. Options: Yes/No                                                                                                           |
| Use in Customer Segment            | Determines if the attribute is included in customer segment conditions. Options: Yes/No                                                                                                                     |

#### STOREFRONT PROPERTIES

| Show on Storefront                 | Determines if the attribute appears as a field in the customer information in the storefront. Options: Yes/No                                                                                               |
| Sort Order                         | Specifies the sort order of this attribute in relation to other customer attributes. The sort order determines the sequence that fields receive focus during data entry when using keyboard navigation. |
| Forms to Use in                    | Determines the pages with data entry forms where the attribute appears. Hold down the Ctrl key to choose multiple forms. Options:  
Customer Address Registration  
Customer Account Address
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

```text
{{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

```text
{{depend prefix}}{{var prefix}}{{depend}}{{var firstname}}{{depend middlename}}{{var middlename}}{{depend}}{{var lastname}}{{depend suffix}}{{var suffix}}{{depend firstname}<br/>{{/depend}}

{{depend company}}{{var company}<br/>{{depend}}{{/depend}}

{{if street1}}{{var street1}<br/>{{/if}}

{{depend street2}}{{var street2}<br/>{{depend}}{{/depend}}

{{depend street3}}{{var street3}<br/>{{depend}}{{/depend}}

{{depend street4}}{{var street4}<br/>{{depend}}{{/depend}}

{{if city}}{{var city}}, {{if}}{{if region}}{{var region}}, {{if}}{{if}}{{if postcode}}{{var postcode}}{{if}}{{/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}}
```
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: Product Attributes.

Product Attributes Page
# Properties

## Property Descriptions

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ATTRIBUTE PROPERTIES</strong></td>
<td></td>
</tr>
<tr>
<td>Default Label</td>
<td>The label that identifies the attribute during data entry.</td>
</tr>
<tr>
<td>Catalog Input Type for Store Owner</td>
<td>Determines the data type and input control that is used to manage the product from the store Admin. Options include:</td>
</tr>
<tr>
<td>Text Field</td>
<td>A single line input field for text.</td>
</tr>
<tr>
<td>Text Area</td>
<td>A multiple-line input field that can display paragraphs of text formatted with HTML.</td>
</tr>
<tr>
<td>Date</td>
<td>An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.</td>
</tr>
<tr>
<td>Yes/No</td>
<td>A drop-down list with predefined options of “Yes” and “No.”</td>
</tr>
<tr>
<td>Multiple Select</td>
<td>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.</td>
</tr>
<tr>
<td>Dropdown</td>
<td>A drop-down list of options that allows only one selection.</td>
</tr>
<tr>
<td>Price</td>
<td>An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.</td>
</tr>
<tr>
<td>Media Image</td>
<td>An additional image that can be included in the attribute set of a product.</td>
</tr>
<tr>
<td>Visual Swatch</td>
<td>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.</td>
</tr>
</tbody>
</table>
### Property Descriptions (cont.)

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Swatch</td>
<td>A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.</td>
</tr>
<tr>
<td>Fixed Product Tax</td>
<td>An input type that gives you the ability to define FPT rates based on the requirements of your locale.</td>
</tr>
</tbody>
</table>

| 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

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Code</td>
<td>(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 (_) can be used to indicate a space.</td>
</tr>
<tr>
<td>Scope</td>
<td>Limits the use of an attribute to a specific store view or website. Options include: Store View, Website, Global</td>
</tr>
<tr>
<td>Default Value</td>
<td>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: Creating Product Attributes.</td>
</tr>
<tr>
<td></td>
<td>A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.</td>
</tr>
<tr>
<td>Unique Value</td>
<td>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</td>
</tr>
<tr>
<td>Input Validation for Store Owner</td>
<td>Performs a validation check of the data entered in the field, based on the following options:</td>
</tr>
</tbody>
</table>
Property Descriptions (cont.)

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td></td>
</tr>
<tr>
<td>Decimal Number</td>
<td></td>
</tr>
<tr>
<td>Integer Number</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td></td>
</tr>
<tr>
<td>Letters</td>
<td></td>
</tr>
<tr>
<td>Letters (a-z, A-Z) or Numbers (0-9)</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use in Search</td>
<td>Select “Yes” if you want people to be able to search the catalog based on the value of this attribute. Options include: Yes / No</td>
</tr>
<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>
</tbody>
</table>

Using too many attributes can slow down search.

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.)

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>The attribute is not available to be used as a filter in layered navigation.</td>
</tr>
<tr>
<td>Filterable (with results)</td>
<td>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.</td>
</tr>
<tr>
<td>Filterable (no results)</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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.

The Position field will be grayed out by default. You must save the attribute before you can modify this setting.

### 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
## Property Descriptions (cont.)

<table>
<thead>
<tr>
<th>PROPERTY</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used in Product Listing</td>
<td>Depends on the theme. To include the attribute in product summaries that appear in catalog listings, select “Yes.”</td>
</tr>
<tr>
<td>Used for Sorting in Product Listing</td>
<td>Depending on theme, includes the attribute as a “Sort By” option for catalog listings. Options: Yes / No</td>
</tr>
</tbody>
</table>
System
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.

System Menu
Data Transfer
  Working with CSV Files
    Data Validation
  Import
    Import History
    Product Images
    Importing Tier Prices
    Import Guidelines
  Export
    Export Criteria
    Exporting Tier Prices
  Scheduled Import/Export
    Scheduling an Import
    Scheduling an Export

Product Attribute Reference
  Complex Data
  Advanced Pricing
  Customer Attribute Reference

Integrations
  Integration with ERP Systems
  Magento Marketplace

Permissions
  Adding Users
  Locked Users
  User Roles
  Role Resources

Alternate Media Storage
  Using a Database
  Using a CDN

Security
  Security Scan
  Security Best Practices
    Security Action Plan
  Configuring Admin Security
  CAPTCHA
  Encryption Key
  Session Validation
  Browser Capabilities Detection
  Action Log
    Report
    Archive
    Bulk Actions

Tools
  Cache Management
    Full Page Cache
  Index Management
    IndexTrigger Events
  Backups
  Cron (Scheduled Tasks)
  Developer Tools
    Frontend Development Workflow
    Using Static File Signatures
    Optimizing Resource Files
    Developer Client Restrictions
    Template Path Hints
    Translate Inline
  Web Setup Wizard
    Extension Manager
    Module Manager
    System Upgrade
    System Configuration
  Support
    Data Collector
    System Report
CHAPTER 106:
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.

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.

Amazon Logs

Provides access to Client and IPN logs, if enabled in the Develothe Options section of the Amazon Pay configuration.
CHAPTER 107:

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.

*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++

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_&lt;name&gt;</td>
<td>Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not product attributes.</td>
</tr>
<tr>
<td>&lt;attribute name&gt;</td>
<td>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.</td>
</tr>
</tbody>
</table>
Customer CSV Structure

The customers CSV file contains customer information from the database, and has the following structure:

![Exported Customer CSV in OpenOffice Calc](image)

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

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_&lt;name&gt;</td>
<td>Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not customer attributes.</td>
</tr>
<tr>
<td>&lt;attribute name&gt;</td>
<td>The names of the columns with values of both system-created attributes, and attributes created by the store administrator.</td>
</tr>
</tbody>
</table>
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.

![Validation Results](image)

*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 products, advanced pricing data, customer data, customer address data, and product images. Import supports the following operations:

- Add/Update
- Replace
- Delete

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.

Special characters — such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols — can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an “escape sequence.” For example, if the data includes a string of text such as code="str", code="str2", choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.

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.

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.

   Make sure your file isn't more than 2M.

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
   - Delete

2. To determine what happens when an error is encountered when importing data, choose one of the following:
   - Stop on Error
   - Skip error entries

   Then in the **Allowed Errors Count** field, enter the number of errors that can occur before the import is canceled. The default value is 10.

3. 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.
   c. If you want to enclose any special characters that might be found in the data as an “escape sequence,” mark the **Fields Enclosure** checkbox.
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.

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:

   **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](image)

**URL Key Already Exists**

A message appears when the import is complete.

**Import Behavior**

<table>
<thead>
<tr>
<th>OPERATION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Update</td>
<td>New product data is added to the existing product data for the existing entries in the database. All fields except <code>sku</code> can be updated. New tax classes that are specified in the import data are created automatically. New product categories that are specified in the import file are created automatically. New SKUs that are specified in the import file are created automatically.</td>
</tr>
<tr>
<td>Replace</td>
<td>The existing product data is replaced with new data. Exercise caution when replacing data because the existing product data will be completely cleared and all references in the system will be lost. 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. An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</td>
</tr>
<tr>
<td>Delete</td>
<td>Any entities in the import data that already exist in the database are deleted from the database. Delete ignores all columns in the import data, except for SKU. You can disregard all other attributes in the data. An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</td>
</tr>
</tbody>
</table>
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.

![Import History](image)
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.

   \[\text{magento installation folder}/\text{pub/media/import}\]

   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.
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

   **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).

   ![Image Import](http://example.com/images/image.jpg)

3. Follow the instructions to import the data.

**Importing Tier Prices**

Rather than entering tier prices manually for each product, it can be more efficient to import the pricing data. Before you begin, create a sample file of exported tier price data that you can use as a template.
Tier Pricing

Step 1: Export the Tier Price Data

The following example exports tier pricing data for a single product. Then, you can use the exported data as a template for bulk imports of tier price data. To learn more about exporting advanced pricing data, see: Advanced Pricing Data.

1. On Admin sidebar, choose System. Then under Data Transfer, choose Export.
2. Under Export Settings, set Entity Type to “Advanced Pricing.”
3. In the Entity Attributes grid, scroll down to the SKU attributes. Then, do the following:
   a. For tier prices that are based on a discount percentage, enter the SKU of each product to be exported, separated by a comma.
a. For tier prices that are based on a fixed amount, enter the SKU of each product.

4. Scroll down and tap Continue.

5. Look in the lower-left corner of your browser window for the export file. Then, open the file.

<table>
<thead>
<tr>
<th></th>
<th>sku</th>
<th>tier_price_website</th>
<th>tier_price_customer_group</th>
<th>tier_price_qty</th>
<th>tier_price</th>
<th>tier_price_value_type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>24-UG85</td>
<td>All Websites [USD]</td>
<td>ABC Catalog</td>
<td>25</td>
<td></td>
<td>25 Discount</td>
</tr>
<tr>
<td>3</td>
<td>24-UG85</td>
<td>All Websites [USD]</td>
<td>ABC Catalog</td>
<td>50</td>
<td></td>
<td>35 Discount</td>
</tr>
<tr>
<td>4</td>
<td>24-UG85</td>
<td>All Websites [USD]</td>
<td>ABC Catalog</td>
<td>75</td>
<td></td>
<td>40 Discount</td>
</tr>
</tbody>
</table>

Exported Tier Price Data

The following columns are included in the exported data:

- sku
- tier_price_website
- tier_price_customer_group
- tier_price_qty
- tier_price
- tier_price_value_type

You will use the exported data as a template for importing tier price data.

Step 2: Update the Data

1. Update the tier price data for each product, as needed.

2. Any products without tier price updates can be deleted from the CSV file. There is no need to reimport products that haven’t changed.

3. Save the updated CSV file.

   The size of an import file cannot be larger than 2 megabytes.

Step 3: Import the Updated Data

1. On Admin sidebar, choose System. Then under Data Transfer, choose Import.

2. Under Import Settings, set Entity Type to “Advanced Pricing.” Then, set Import Behavior to “Add/Update”.

3. Under File to Import, tap Choose File. Then, select the file that you prepared to import from your directory.

4. In the upper-right corner, tap Check Data.
5. 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.
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.

Special characters — such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols — can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an “escape sequence.” For example, if the data includes a string of text such as code="str",code="str2", choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.

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.”

   c. If you want to enclose any special characters that might be found in the data as an “escape sequence,” mark the Fields Enclosure checkbox.

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.
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.

   ![Filtered Entity Attributes]

   **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.

   ![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 include 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 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**

<table>
<thead>
<tr>
<th>EXCLUDE</th>
<th>FILTER</th>
<th>RESULT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
<td>The exported file contains each attribute for all existing records.</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td>The export file contains each attribute with only the records allowed by the filter.</td>
</tr>
<tr>
<td>✓</td>
<td>No</td>
<td>The export file does not include the column for the excluded attribute, but does include all existing records.</td>
</tr>
<tr>
<td>✓</td>
<td>Yes</td>
<td>The export file does not include the column for the excluded attribute, and contains only the records allowed by the filter.</td>
</tr>
</tbody>
</table>
Data Transfer Examples

This section of the guide contains examples that show how to import and export catalog data for specific product types and scenarios.

- Configurable Products
- Tier Prices

Importing Configurable Products

The best way to understand how configurable product data is structured, is to export a configurable product and its variations, and examine the data in a spreadsheet.

In the following example, you will add a set of product variations for a new size in each color. First, you will export the configurable product, and examine the data structure. Then, you will update the data and import it back into the catalog. If you don’t want to go through the exercise of exporting the data, you can download the CSV file that is used in the example.

Step 1: Verify Attribute Settings and Values

1. Before you begin, make sure that the attributes that are used for product variations have the required property settings.

<table>
<thead>
<tr>
<th>Scope</th>
<th>Global</th>
</tr>
</thead>
</table>

   | Catalog Input Type for Store Owner | The input type of any attribute that is used for a product variation must be one of the following: |
2. If you are adding a new size or color, or making any other change to an existing attribute, make sure to update the attribute with the new value.
   a. On the Admin sidebar choose **Stores**. Then under **Attributes**, choose **Product**.
   b. Find the attribute in the list, and open in edit mode.
   c. Add the new value to the attribute. In the following example, a new size is added to a Text Swatch.

   ![Add New Value]

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

4. If you are adding a new attribute, follow the instructions to create the attribute before you begin.

**Step 2: Export the Configurable Product**

1. On the Admin sidebar, choose **Catalog**. Then, tap **Products**, and do the following:
   a. Tap **Filters**. Then, set **Type** to “Configurable Product, and tap **Apply Filters**.
   b. Choose the configurable product that you want to use for your test export, and take note of the **SKU**.

2. On the Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Export**.

3. Under **Export Settings**, do the following:
   a. Set **Entity Type** to “Products”.
   b. Set **Export File Format** to “CSV”.
4. Under **Entity Attributes**, scroll down to **SKU**. Then, do the following:

   a. Enter the **SKU** of the configurable product that you have chosen to export, and tap **Continue**.

   ![SKU](image)

   b. When the export file appears at the bottom of the window, click **Open**.

   When opened in a spreadsheet, the CSV file has a separate row for each simple product variation, and one row for the configurable product. The **product_type** column shows multiple simple product variations that are associated with one configurable product.

   ![Configurable Product with Variations](image)

   c. Scroll to the far right of the worksheet to find the following columns. In this example, the data can be found in columns CG and CH.

   ```
   configurable_variations
   Defines the one-to-many relationship between the configurable product record and each variation.

   configurable_variation_labels
   Defines the label that identifies each variation.
   ```

   Depending on the number of variations, the string of data in the **configurable_variations** column can be quite long. The data is used as an index to the associated product variations, and has the following structure:
Data Format

```
sku={SKU_VALUE},attribute1={VALUE},attribute2={VALUE} | 
 sku={SKU_VALUE},attribute1={VALUE},attribute2={VALUE}
```

Each sku is separated by a pipe symbol (|), and attributes are separated by a comma. The value of each attribute is represented by the attribute code, rather than the attribute label. Here's how the actual data appears:

**Example Data**

```
sku=MH01-XS-Black,size=XS,color=Black | 
sku=MH01-XS-Gray,size=XS,color=Gray | 
sku=MH01-XS-Orange,size=XS,color=Orange
```

5. When you understand the structure of configurable product data, you can edit the data, or add new variations directly to the CSV file. To learn more, see: [Complex Data](#).

**Step 3: Edit the Data**

In the following example, the set of XL sizes is copied and pasted into the worksheet to create a new set of product variations for a new size in each color.

1. Copy the set of product variations that you want to use as a template for the new products.

![Copy Product Variations](image)

2. Insert the copied rows records into the worksheet. You now have two identical sets of the simple product variations.

![Paste New Product Variations into CSV File](image)

3. Update the data in the following columns of the new variations, as needed. For this example, all the “XL” references are changed to “XXL”.

![Updated Data](image)
4. The next step is to update the information in the product_variations column of the configurable product record, so the new variations are included as part of the configurable product.
   
a. On the row with the configurable product record, click the cell that contains the product_variations data. Then in the formula bar, copy the last set of parameters, beginning with the pipe symbol.

   ![Formula Bar]

   `product_variations`

   b. Paste the parameters to the end of the data. Then, edit as needed for the new variations. In this example, the sku and size parameters are updated for the new “XXL” size.

5. Before the data is imported back into the catalog, delete any rows that have not changed.

   In this example, only the three new variations for the new size, and the row with the updated configurable product are imported back into the catalog. The other rows can be deleted from the CSV file. However, make sure not to delete the header row with column labels.

   ![Data Ready to Import]

6. Save the CSV file. The data is ready to import into the catalog.

   The size of an import file cannot be larger than 2 megabytes.

**Step 4: Import the Updated Data**

1. On the Admin sidebar, choose System. Then under Data Transfer, choose Import.

2. Under Import Settings, set Entity Type to “Products”.

   ![Import Settings]
3. Under **Import Behavior**, set **Import Behavior** to “Add/Update”.

![Import Behavior](image)

4. Under **File to Import**, tap **Choose File**. Then, navigate to the CSV file that you prepared for import and choose the file.

![File to Import](image)

5. In the upper-right corner tap **Check Data**.

6. If the file is valid, tap **Import**. Otherwise, correct any problems found in the data and try again.

![Validation Results](image)

7. When the import is complete, click the **Cache Management** link in the message at the top of the page. Then, refresh all invalid caches.

The new product variations are now available in the catalog from the Admin and in the storefront. In this example, the hoodie is now available in size XXL for all colors.
Importing Tier Prices

Rather than entering tier prices manually for each product, it can be more efficient to import the pricing data. Before you begin, create a sample file of exported tier price data that you can use as a template.

**Tier Pricing**

**Step 1: Export the Tier Price Data**

The following example exports tier pricing data for a single product. Then, you can use the exported data as a template for bulk imports of tier price data. To learn more about exporting advanced pricing data, see: Advanced Pricing Data.

1. On Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Export**.
2. Under **Export Settings**, set **Entity Type** to “Advanced Pricing.”
3. In the **Entity Attributes** grid, scroll down to the SKU attributes. Then, do the following:
a. For tier prices that are based on a discount percentage, enter the SKU of each product to be exported, separated by a comma.

```
SKU(s) to Export
```

a. For tier prices that are based on a fixed amount, enter the SKU of each product.

4. Scroll down and tap **Continue**.

5. Look in the lower-left corner of your browser window for the export file. Then, open the file.

```
<table>
<thead>
<tr>
<th>sku</th>
<th>tier_price_website</th>
<th>tier_price_customer_group</th>
<th>tier_price_qty</th>
<th>tier_price</th>
<th>tier_price_value_type</th>
</tr>
</thead>
<tbody>
<tr>
<td>24-US06</td>
<td>All Websites [USD]</td>
<td>ABC Catalog</td>
<td>25</td>
<td>75</td>
<td>40 Discount</td>
</tr>
<tr>
<td>24-US06</td>
<td>All Websites [USD]</td>
<td>ABC Catalog</td>
<td>50</td>
<td>35</td>
<td>25 Discount</td>
</tr>
<tr>
<td>24-US06</td>
<td>All Websites [USD]</td>
<td>ABC Catalog</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

**Exported Tier Price Data**

The following columns are included in the exported data:

- `sku`
- `tier_price_website`
- `tier_price_customer_group`
- `tier_price_qty`
- `tier_price`
- `tier_price_value_type`

You will use the exported data as a template for importing tier price data.

**Step 2: Update the Data**

1. Update the tier price data for each product, as needed.

2. Any products without tier price updates can be deleted from the CSV file. There is no need to reimport products that haven’t changed.

3. **Save** the updated CSV file.

The size of an import file cannot be larger than 2 megabytes.
Step 3: Import the Updated Data

1. On Admin sidebar, choose System. Then under Data Transfer, choose Import.

2. Under Import Settings, set Entity Type to “Advanced Pricing.” Then, set Import Behavior to “Add/Update”.

3. Under File to Import, tap Choose File. Then, select the file that you prepared to import from your directory.

4. In the upper-right corner, tap Check Data.

5. 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.
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**.

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.”
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.

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](image)

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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IMPORT SETTINGS</strong></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>The name of the import. Helps you to distinguish it if many different scheduled imports are created.</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) You can enter an additional description.</td>
</tr>
<tr>
<td>Entity Type</td>
<td>Defines the data to be imported. Options: Products / Customers.</td>
</tr>
<tr>
<td>Import Behavior</td>
<td>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: 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.</td>
</tr>
<tr>
<td>Start Time</td>
<td>Set the start hour, minutes, and seconds of the import.</td>
</tr>
<tr>
<td>Frequency</td>
<td>Define how often the import will be run. Options: Daily/Weekly/Monthly.</td>
</tr>
<tr>
<td>On Error</td>
<td>Define the system behavior in case errors are found during file validation. Options: 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.</td>
</tr>
<tr>
<td>Status</td>
<td>The import is enabled by default. You can suspend it by setting the Status to Disabled.</td>
</tr>
<tr>
<td>Field Separator</td>
<td>Determines the character that is used to separate fields. Default value: , (comma)</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Value Separator</td>
<td>Determines the character that is used to separate multiple values within a field. Default value: , (comma)</td>
</tr>
</tbody>
</table>

IMPORT FILE INFORMATION

<table>
<thead>
<tr>
<th>Server Type</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Directory</td>
<td>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.</td>
</tr>
<tr>
<td>File Name</td>
<td>Specify the name of the import file.</td>
</tr>
<tr>
<td>Images File Directory</td>
<td>Enter the path to the directory where product images are stored. For a local server, enter a relative path. For example: var/import</td>
</tr>
</tbody>
</table>

IMPORT FAILED EMAILS

<table>
<thead>
<tr>
<th>Failed Email Receiver</th>
<th>Specify the email address to which an email notification (failed import email) is sent if the import fails.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Failed Email Sender</td>
<td>Specify the email address that is used as the sender for the import failed email.</td>
</tr>
<tr>
<td>Failed Email Template</td>
<td>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 &gt; Transactional Emails.</td>
</tr>
<tr>
<td>Send Failed Email Copy To</td>
<td>The email address to which a copy of import failed email is sent.</td>
</tr>
<tr>
<td>Send Failed Email Copy Method</td>
<td>Select the copy sending method for the import failed email.</td>
</tr>
</tbody>
</table>
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.

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**.
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.

2. Enter the **File Directory** where the export file is to be saved as follows:
   - 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.
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

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXPORT SETTINGS</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>The name of the export. Helps you to distinguish it if many different scheduled exports are created.</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) A description of the scheduled export.</td>
</tr>
<tr>
<td>Entity Type</td>
<td>Identifies the data to be exported. After the selection is made, the Entity Attributes appear below. Options include: Products /Customers.</td>
</tr>
<tr>
<td>Start Time</td>
<td>Set the start hour, minutes, and seconds of the export.</td>
</tr>
<tr>
<td>Frequency</td>
<td>Define how often the export job will be executed. Options include:Daily/Weekly/Monthly.</td>
</tr>
</tbody>
</table>
Field Descriptions (cont.)

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>A new scheduled export is enabled by default. You can suspend it by setting Status to Disabled. Options include: Enabled/Disabled.</td>
</tr>
<tr>
<td>File Format</td>
<td>Select the format of the export file. Currently only the .CSV option is available.</td>
</tr>
</tbody>
</table>

**EXPORT SETTINGS INFORMATION**

<table>
<thead>
<tr>
<th>Server Type</th>
<th>Determines the location of the export file. Options include:</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

| 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. |

**EXPORT FAILED EMAILS**

<table>
<thead>
<tr>
<th>Failed Email Receiver</th>
<th>Specify the email address to which an email notification (export failed email) is sent if the export fails.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Failed Email Sender</td>
<td>Specify the email address that is used as export failed email sender.</td>
</tr>
<tr>
<td>Failed Email Template</td>
<td>Select a template for the failed export email. By default, only the Export Failed (Default Template from Locale) option is available.</td>
</tr>
<tr>
<td>Send Failed Email Copy To</td>
<td>The email address to which a copy of the failed export email is sent.</td>
</tr>
<tr>
<td>Send Failed Email Copy Method</td>
<td>Specify the copy sending method for the export failed email.</td>
</tr>
</tbody>
</table>
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. You can export a product from your catalog, to see how each attribute is represented in the 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

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>sku</td>
<td>(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</td>
</tr>
<tr>
<td></td>
<td>A SKU longer than 64 characters will cause import to fail.</td>
</tr>
<tr>
<td>store_view_code</td>
<td>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</td>
</tr>
<tr>
<td>attribute_set_code</td>
<td>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</td>
</tr>
<tr>
<td>product_type</td>
<td>Indicates the type of product. Values:</td>
</tr>
<tr>
<td></td>
<td>simple</td>
</tr>
<tr>
<td></td>
<td>Tangible items that are generally sold as single units or in fixed quantities.</td>
</tr>
<tr>
<td></td>
<td>grouped</td>
</tr>
<tr>
<td></td>
<td>A group of separate products that is sold as a set.</td>
</tr>
<tr>
<td>ATTRIBUTE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>configurable</td>
<td>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.</td>
</tr>
<tr>
<td>virtual</td>
<td>A non-tangible product that does not require shipping and is not kept in inventory. Examples include services, memberships, and subscriptions.</td>
</tr>
<tr>
<td>bundle</td>
<td>A customizable product set of simple products that are sold together.</td>
</tr>
</tbody>
</table>

**categories**
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: Default Category/Gear|Default Category/Gear/Bags

**product_websites**
The [website code](#) 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:
base
base,website2

**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.
<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>short_description</td>
<td>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.</td>
</tr>
<tr>
<td>weight</td>
<td>The weight of the individual product. The actual product weight is determined by the carrier at the time of shipment.</td>
</tr>
<tr>
<td>product_online</td>
<td>Determines if the product is available for sale in the store. Values: 1 (Yes) The product is enabled, and available for sale. 2 (No) The product is disabled, and is not available for sale.</td>
</tr>
<tr>
<td>tax_class_name</td>
<td>The name of the tax class that is associated with this product.</td>
</tr>
<tr>
<td>visibility</td>
<td>Determines if the product is visible in the catalog, and made available for search. Values:</td>
</tr>
<tr>
<td></td>
<td>Not Visible Individually The product is not included in product listings, although it might be available as a variation of another product.</td>
</tr>
<tr>
<td></td>
<td>Catalog The product appears in all catalog listings.</td>
</tr>
<tr>
<td></td>
<td>Search The product is available for search operations.</td>
</tr>
<tr>
<td></td>
<td>Catalog, Search The product is included in catalog listings and is also available for search.</td>
</tr>
<tr>
<td>price</td>
<td>The price that the product is offered for sale in your store.</td>
</tr>
<tr>
<td>special_price</td>
<td>The discounted price of the product during the specified date range.</td>
</tr>
<tr>
<td>special_price_from_date</td>
<td>The beginning date of the time period when the special price is in effect.</td>
</tr>
</tbody>
</table>
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>special_price_to_date</td>
<td>The last date of the time period when the special price is in effect.</td>
</tr>
<tr>
<td>url_key</td>
<td>The part of the URL that identifies the product. The default value is based on the product name. For example: product-name</td>
</tr>
<tr>
<td>meta_title</td>
<td>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.</td>
</tr>
<tr>
<td>meta_keywords</td>
<td>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.</td>
</tr>
<tr>
<td>meta_description</td>
<td>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.</td>
</tr>
<tr>
<td>base_image</td>
<td>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</td>
</tr>
<tr>
<td>base_image_label</td>
<td>The label that is associated with the base image.</td>
</tr>
<tr>
<td>small_image</td>
<td>The file name of the small image that is used on catalog pages, preceded by a forward slash. For example: /image.jpg</td>
</tr>
<tr>
<td>small_image_label</td>
<td>The label associated with the small image. For example: Small Image 1, Small Image 2</td>
</tr>
<tr>
<td>thumbnail_image</td>
<td>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</td>
</tr>
</tbody>
</table>
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>thumbnail_image_label</td>
<td>The label associated with any thumbnail images. For example: Thumbnail 1, Thumbnail 2</td>
</tr>
<tr>
<td>created_at</td>
<td>Indicates the date when the product was created. The date is automatically generated when the product is created, but can be edited later.</td>
</tr>
<tr>
<td>updated_at</td>
<td>Indicates the date when the product was last updated.</td>
</tr>
<tr>
<td>new_from_date</td>
<td>Specifies the “from” date for new product listings, and determines if the product is featured as a new product.</td>
</tr>
<tr>
<td>new_to_date</td>
<td>Specifies the “to” date for new product listings, and determines if the product is featured as a new product.</td>
</tr>
<tr>
<td>display_product_options_in</td>
<td>If the product has multiple options, determines where they appear on the product page. Values: Product Info Column, Block after Info Column</td>
</tr>
<tr>
<td>map_price</td>
<td>The minimum advertised price of the product. (Appears only if MAP is enabled.)</td>
</tr>
<tr>
<td>msrp_price</td>
<td>The manufacturer’s suggested retail price for the product. (Appears only if MAP is enabled.)</td>
</tr>
<tr>
<td>map_enabled</td>
<td>Determines if Minimum Advertised Price is enabled in the configuration. Values: 1 (Yes) MAP is enabled, 0 (or blank) (No) MAP is not enabled.</td>
</tr>
<tr>
<td>gift_message_available</td>
<td>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</td>
</tr>
<tr>
<td>custom_design</td>
<td>Lists the available themes that can be applied to the product page.</td>
</tr>
</tbody>
</table>
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>custom_design_from</code></td>
<td>Specifies the beginning date when the selected theme is applied to the product page.</td>
</tr>
<tr>
<td><code>custom_design_to</code></td>
<td>Specifies the end date when the selected theme is applied to the product page.</td>
</tr>
<tr>
<td><code>custom_layout_update</code></td>
<td>Additional XML code that is applied as a layout update to the product page.</td>
</tr>
<tr>
<td><code>page_layout</code></td>
<td>Determines the page layout of the product page. Values:</td>
</tr>
<tr>
<td></td>
<td>No layout updates:</td>
</tr>
<tr>
<td></td>
<td>No change is made to the page layout.</td>
</tr>
<tr>
<td></td>
<td>1 column:</td>
</tr>
<tr>
<td></td>
<td>Applies a one-column layout to the product page.</td>
</tr>
<tr>
<td></td>
<td>2 columns with left bar:</td>
</tr>
<tr>
<td></td>
<td>Applies a two-column layout with a left sidebar to the product page.</td>
</tr>
<tr>
<td></td>
<td>2 columns with right bar:</td>
</tr>
<tr>
<td></td>
<td>Applies a two-column layout with a right sidebar to the product page.</td>
</tr>
<tr>
<td></td>
<td>3 columns:</td>
</tr>
<tr>
<td></td>
<td>Applies a three-column layout to the product page.</td>
</tr>
<tr>
<td></td>
<td>empty:</td>
</tr>
<tr>
<td></td>
<td>Applies a blank layout to the product page.</td>
</tr>
<tr>
<td><code>product_options_container</code></td>
<td>If the product has multiple options, determines where they appear on the product page. Values:</td>
</tr>
<tr>
<td></td>
<td>Product Info Column</td>
</tr>
<tr>
<td></td>
<td>Block after Info Column</td>
</tr>
<tr>
<td><code>msrp_display_actual_price_type</code></td>
<td>Determines where the actual price of a product is visible to the customer. Values:</td>
</tr>
</tbody>
</table>
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Cart</td>
<td>Displays the actual product price in the shopping cart.</td>
</tr>
<tr>
<td>Before Order Confirmation</td>
<td>Displays the actual product price at the end of the checkout process, just before the order is confirmed.</td>
</tr>
<tr>
<td>On Gesture</td>
<td>Displays the actual product price in a popup when the customer clicks the “Click for price” or “What’s this?” link.</td>
</tr>
<tr>
<td>country_of_manufacture</td>
<td>Identifies the country where the product was manufactured.</td>
</tr>
<tr>
<td>additional_attributes</td>
<td>Additional attributes created for the product. For example:</td>
</tr>
<tr>
<td></td>
<td>has_options=0,required_options=0</td>
</tr>
<tr>
<td></td>
<td>color=Black,has_options=0,required_options=0,size_general=XS</td>
</tr>
<tr>
<td>qty</td>
<td>The quantity of the product that is currently in stock.</td>
</tr>
<tr>
<td>out_of_stock_qty</td>
<td>The stock level that determines the product to be out of stock.</td>
</tr>
<tr>
<td>use_config_min_qty</td>
<td>Determines if the default value from the configuration is used, and corresponds to the Use Config Settings checkbox. Values:</td>
</tr>
<tr>
<td></td>
<td>1 (Yes) The default configuration setting is used for the value of this attribute.</td>
</tr>
<tr>
<td></td>
<td>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</td>
</tr>
<tr>
<td>is_qty_decimal</td>
<td>Determines if the qty attribute has a decimal value.</td>
</tr>
<tr>
<td></td>
<td>Values:</td>
</tr>
<tr>
<td></td>
<td>1 (Yes) The value of the qty attribute is a decimal value.</td>
</tr>
<tr>
<td></td>
<td>0 (or blank) (No) The value of the qty attribute is a whole number (integer).</td>
</tr>
</tbody>
</table>
## Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>allow_backorders</td>
<td>Determines if your store allows backorders, and how they are managed.</td>
</tr>
<tr>
<td>use_config_backorders</td>
<td>Determines if the default configuration setting for backorders is used, and</td>
</tr>
<tr>
<td></td>
<td>corresponds to the state of the Use Config Settings checkbox. Values:</td>
</tr>
<tr>
<td></td>
<td>1 (Yes) The default configuration setting is used for the value of this</td>
</tr>
<tr>
<td></td>
<td>attribute.</td>
</tr>
<tr>
<td></td>
<td>0 (or blank) (No) The default configuration can be overridden for the value</td>
</tr>
<tr>
<td></td>
<td>of this attribute.</td>
</tr>
<tr>
<td>min_cart_qty</td>
<td>Specifies the minimum quantity of the item that can be purchased in a</td>
</tr>
<tr>
<td></td>
<td>single order.</td>
</tr>
<tr>
<td>use_config_min_sale_qty</td>
<td>Determines if the default configuration setting for minimum quantity is</td>
</tr>
<tr>
<td></td>
<td>used, and corresponds to the state of the Use Config Settings checkbox.</td>
</tr>
<tr>
<td></td>
<td>Values:</td>
</tr>
<tr>
<td></td>
<td>1 (Yes) The default configuration setting is used for the value of this</td>
</tr>
<tr>
<td></td>
<td>attribute.</td>
</tr>
<tr>
<td></td>
<td>0 (or blank) (No) The default configuration can be overridden for the value</td>
</tr>
<tr>
<td></td>
<td>of this attribute.</td>
</tr>
<tr>
<td>max_cart_qty</td>
<td>Specifies the maximum quantity of the product that can be purchased in a</td>
</tr>
<tr>
<td></td>
<td>single order.</td>
</tr>
<tr>
<td>use_config_max_sale_qty</td>
<td>Determines if the default configuration setting for maximum quantity is</td>
</tr>
<tr>
<td></td>
<td>used, and corresponds to the state of the Use Config Settings checkbox.</td>
</tr>
<tr>
<td></td>
<td>Values:</td>
</tr>
<tr>
<td></td>
<td>1 (Yes) The default configuration setting is used for the value of this</td>
</tr>
<tr>
<td></td>
<td>attribute.</td>
</tr>
<tr>
<td></td>
<td>0 (or blank) (No) The default configuration can be overridden for the value</td>
</tr>
<tr>
<td></td>
<td>of this attribute.</td>
</tr>
<tr>
<td>is_in_stock</td>
<td>Indicates if the product is in stock.</td>
</tr>
<tr>
<td>notify_on_stock_below</td>
<td>Specifies the stock level that triggers an “out of stock”</td>
</tr>
<tr>
<td></td>
<td>notification.</td>
</tr>
<tr>
<td>use_config_notify_stock_qty</td>
<td>Determines if the default configuration setting is used to trigger stock</td>
</tr>
<tr>
<td></td>
<td>level notification, and corresponds to the state of the Use Config Settings</td>
</tr>
<tr>
<td></td>
<td>checkbox.</td>
</tr>
<tr>
<td></td>
<td>Values:</td>
</tr>
</tbody>
</table>

---

**CHAPTER 107: Data Transfer**

**2111 Magento for B2B Commerce User Guide**
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>manage_stock</code></td>
<td>Determines if inventory control is used to manage the product. Values:</td>
</tr>
<tr>
<td>1</td>
<td>(Yes) Activates full inventory control to manage stock levels of the product.</td>
</tr>
<tr>
<td>0 (or blank)</td>
<td>(No) The system does not keep track of the number of items that are currently in stock.</td>
</tr>
<tr>
<td><code>use_config_manage_stock</code></td>
<td>Determines if the default configuration setting for managing stock is used, and corresponds to the state of the Use Config Settings checkbox. Values:</td>
</tr>
<tr>
<td>1</td>
<td>(Yes) The default configuration setting is used for the value of this attribute.</td>
</tr>
<tr>
<td>0 (or blank)</td>
<td>(No) The default configuration can be overridden for the value of this attribute.</td>
</tr>
<tr>
<td><code>use_config_qty_increments</code></td>
<td>Determines if the default configuration setting for quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values:</td>
</tr>
<tr>
<td>1</td>
<td>(Yes) The default configuration setting is used for the value of this attribute.</td>
</tr>
<tr>
<td>0 (or blank)</td>
<td>(No) The default configuration can be overridden for the value of this attribute.</td>
</tr>
<tr>
<td><code>qty_increments</code></td>
<td>Determines if the product is sold in quantity increments. Options: Yes / No</td>
</tr>
<tr>
<td><code>use_config_enable_qty_inc</code></td>
<td>Determines if the default configuration setting to enable quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values:</td>
</tr>
</tbody>
</table>
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(Yes) The default configuration setting is used for the value of this attribute.</td>
</tr>
<tr>
<td>0 (or blank)</td>
<td>(No) The default configuration can be overridden for the value of this attribute.</td>
</tr>
<tr>
<td>enable_qty Increments</td>
<td>Determines if quantity increments are enabled for the product.</td>
</tr>
<tr>
<td>is_decimal_divided</td>
<td>Determines if parts of the product can be shipped separately. Options: Yes / No</td>
</tr>
<tr>
<td>website_id</td>
<td>For installations with multiple websites, identifies a specific website where the product is available. If blank, the product is available in all websites.</td>
</tr>
<tr>
<td>related_skus</td>
<td>Lists the sku of each product that has been identified as a Related Product. For example: 24-WG080, 24-UG03, 24-UG01, 24-UG02</td>
</tr>
<tr>
<td>crosssell_skus</td>
<td>Lists the sku of each product that has been identified as a Cross-sell.</td>
</tr>
<tr>
<td>upsell_skus</td>
<td>Lists the sku of each product that has been identified as an Upsell.</td>
</tr>
<tr>
<td>additional_images</td>
<td>The file names of any additional image to be associated with the product, preceded by a forward slash. For example: /image.jpg</td>
</tr>
<tr>
<td>additional_image_labels</td>
<td>The labels associated with any additional images. For example: Label 1, Label 2</td>
</tr>
<tr>
<td>custom_options</td>
<td>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</td>
</tr>
</tbody>
</table>

---

**SERVICE DATA FOR PRODUCT VARIATIONS**
### Simple Product CSV File Structure (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_super_products_sku</td>
<td>The generated SKU for a configurable product variation. For example: WB03-XS-Green. Applies to: Configurable Products</td>
</tr>
<tr>
<td>_super_attribute_code</td>
<td>The attribute code of a configurable product variation. For example: color. Applies to: Configurable Products</td>
</tr>
<tr>
<td>_super_attribute_option</td>
<td>The value of a configurable product variation. For example: green. Applies to: Configurable Products</td>
</tr>
<tr>
<td>_super_attribute_price_corr</td>
<td>A price adjustment that is associated with a configurable product variation. Applies to: Configurable Products</td>
</tr>
<tr>
<td>_associated_sku</td>
<td>The SKU of a product that is associated with a grouped product. Applies to: Grouped Products Bundle Products</td>
</tr>
<tr>
<td>_associated_default_qty</td>
<td>Determines the quantity of the associated product that is included. Applies to: Configurable Products Grouped Products Bundle Products</td>
</tr>
<tr>
<td>_associated_position</td>
<td>Determines the position of the associated product when listed with other associated products. Applies to: Configurable Products Grouped Products Bundle Products</td>
</tr>
</tbody>
</table>
Complex Data

The term complex data 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.

1Data that is associated with multiple product options.
## Complex Data Attributes

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CONFIGURABLE PRODUCTS</strong></td>
<td></td>
</tr>
<tr>
<td>configurable_variation_labels</td>
<td>Labels that identify product variations. For example: Choose Color: Choose Size:</td>
</tr>
<tr>
<td>configurable_variations</td>
<td>Describes the values associated with a product variation. For example: sku=sku-red xs, color=red, size=xs, price=10.99, display=1, image=/pub/media/import/image1.png</td>
</tr>
<tr>
<td><strong>GROUPED PRODUCTS</strong></td>
<td></td>
</tr>
<tr>
<td>associated_skus</td>
<td>Identifies the SKUs of the individual products that make up the group.</td>
</tr>
<tr>
<td><strong>BUNDLE PRODUCTS</strong></td>
<td></td>
</tr>
<tr>
<td>bundle_price_type</td>
<td>Determines if the price of a bundle item is fixed or dynamic.</td>
</tr>
<tr>
<td>bundle_sku_type</td>
<td>Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.</td>
</tr>
<tr>
<td>bundle_weight_type</td>
<td>Determines if the weight of a bundle item is variable or fixed.</td>
</tr>
<tr>
<td>bundle_values</td>
<td>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</td>
</tr>
</tbody>
</table>
Advanced Pricing Data

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.

Advanced Pricing Attributes

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>sku</td>
<td>(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</td>
</tr>
<tr>
<td></td>
<td>A SKU longer than 64 characters will cause import to fail.</td>
</tr>
<tr>
<td>tier_price_website</td>
<td>The website code identifies each website where tier pricing is available. For example: website1 All Websites [USD]</td>
</tr>
<tr>
<td>tier_price_customer</td>
<td>Identifies the customers groups where tier pricing is available. For example: ALL GROUPS NOT LOGGED IN General Wholesale Retailer</td>
</tr>
<tr>
<td>tier_price_customer_group</td>
<td>Identifies the customers groups where tier pricing is available. For example: ALL GROUPS NOT LOGGED IN General Wholesale Retailer</td>
</tr>
</tbody>
</table>
### Advanced Pricing Attributes (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>tier_priceQty</td>
<td>The quantity of the product that must be ordered to receive the tier price discount.</td>
</tr>
<tr>
<td>tier_price</td>
<td>The discounted tier price of the product. For bundle products, tier price is calculated as a percentage.</td>
</tr>
<tr>
<td>group_priceWebsite</td>
<td>The website code of each website where group pricing is available. If specifying multiple websites, separate each with a comma and without a space. For example: website1, All Websites [USD]</td>
</tr>
<tr>
<td>group_priceCustomerGroup</td>
<td>Identifies the customers groups where group pricing is available. For example: NOT LOGGED IN, General, Wholesale, Retailer</td>
</tr>
<tr>
<td>group_price</td>
<td>The discounted group price of the product. For bundle products, group price is calculated as a percentage.</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>email</td>
<td></td>
</tr>
<tr>
<td>_website</td>
<td></td>
</tr>
<tr>
<td>_store</td>
<td></td>
</tr>
<tr>
<td>confirmation</td>
<td></td>
</tr>
<tr>
<td>created_at</td>
<td></td>
</tr>
<tr>
<td>created_in</td>
<td></td>
</tr>
<tr>
<td>disable_auto_group_change</td>
<td></td>
</tr>
<tr>
<td>dob</td>
<td></td>
</tr>
<tr>
<td>firstname</td>
<td></td>
</tr>
<tr>
<td>gender</td>
<td></td>
</tr>
<tr>
<td>group_id</td>
<td></td>
</tr>
<tr>
<td>lastname</td>
<td></td>
</tr>
<tr>
<td>middlename</td>
<td></td>
</tr>
<tr>
<td>password_hash</td>
<td></td>
</tr>
<tr>
<td>prefix</td>
<td></td>
</tr>
<tr>
<td>rp_token</td>
<td></td>
</tr>
<tr>
<td>rp_token_created_at</td>
<td></td>
</tr>
<tr>
<td>store_id</td>
<td></td>
</tr>
<tr>
<td>suffix</td>
<td></td>
</tr>
</tbody>
</table>
### Customers Main File (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>taxvat</td>
<td></td>
</tr>
<tr>
<td>website_id</td>
<td></td>
</tr>
<tr>
<td>password</td>
<td></td>
</tr>
</tbody>
</table>

### Customer Addresses

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>_website</td>
<td></td>
</tr>
<tr>
<td>_email</td>
<td></td>
</tr>
<tr>
<td>_entity_id</td>
<td></td>
</tr>
<tr>
<td>city</td>
<td></td>
</tr>
<tr>
<td>company</td>
<td></td>
</tr>
<tr>
<td>country_id</td>
<td></td>
</tr>
<tr>
<td>fax</td>
<td></td>
</tr>
<tr>
<td>firstname</td>
<td></td>
</tr>
<tr>
<td>lastname</td>
<td></td>
</tr>
<tr>
<td>middlename</td>
<td></td>
</tr>
<tr>
<td>postcode</td>
<td></td>
</tr>
<tr>
<td>prefix</td>
<td></td>
</tr>
<tr>
<td>region</td>
<td></td>
</tr>
<tr>
<td>region_id</td>
<td></td>
</tr>
<tr>
<td>street</td>
<td></td>
</tr>
<tr>
<td>suffix</td>
<td></td>
</tr>
<tr>
<td>telephone</td>
<td></td>
</tr>
<tr>
<td>vat_id</td>
<td></td>
</tr>
<tr>
<td>vat_is_valid</td>
<td></td>
</tr>
<tr>
<td>vat_request_date</td>
<td></td>
</tr>
<tr>
<td>vat_request_id</td>
<td></td>
</tr>
</tbody>
</table>
### Customer Addresses (cont.)

<table>
<thead>
<tr>
<th>ATTRIBUTE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>vat_request_success</td>
<td></td>
</tr>
<tr>
<td><em>address_default_billing</em></td>
<td>Identifies the default billing address. A value of 1 indicates that the address is the default billing address of the customer. Values: 1 / 0</td>
</tr>
<tr>
<td><em>address_default_shipping</em></td>
<td>Identifies the default shipping address. A value of 1 indicates that the address is the default shipping address of the customer. Values: 1 / 0</td>
</tr>
</tbody>
</table>
CHAPTER 108: 

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.
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.

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:
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.

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.
Integration with ERP Systems

Magento for B2B Commerce includes a flexible application programming interface (API) that integrates with a variety of ERP solutions from Magento partners. The robust Magento global ecosystem of developers includes many industry-specific extensions and custom systems, giving you a fast time-to-market at the lowest Total Cost of Ownership. To learn more, see: Top ERP Packages that Integrate with Magento.

Top ERP Packages that Integrate with Magento
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 visit Magento Marketplace:
Go to Magento Marketplace.

To find Magento partners featured on Marketplace:
In the Admin sidebar, tap Find Partners & Extensions.
To learn more, see the Magento Marketplace User Guide.

To install extensions:
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.

For step-by-step installation instructions, see the Marketplace User Guide or Component Manager in this guide.
CHAPTER 109:
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.
Adding Users

When your store is first installed, a default Admin account is created with login credentials that 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 access. 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 based on their business need to know. 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 only to the necessary 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.

![Example Admin Users Diagram](image-url)
**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](image)

*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**.
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

Admin Password Requirements

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: Configuring Admin Security.</td>
</tr>
</tbody>
</table>
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.

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.
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](image)

To set up a role:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
2. In the upper-right corner, tap **Add New Role**. Then, do the following:

   **Step 1: Define the Role**
   1. Under **Role Information**, enter a descriptive **Role Name**.
   2. Under **Current User Identity Verification**, enter **Your Password**.

![Role Name](image)

   **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.

   ![Role Scopes](image)

   **Custom Role Scope**


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.

   ![Roles Resources](image)

   **Role Resources Assigned**

The list of available permissions may include additional options for Magento developed, Core Bundled, and installed extensions. By selecting the top-most permission for each feature, you assign all permissions available for the user.
4. When complete, tap **Save Role**.

The role now appears in the grid, and can be assigned to new user accounts.

**To edit user role assignments:**

1. From the **Roles** grid, open the record in edit mode.
2. Under **Current User Identity Verification**, enter **Your Password**.

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 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

<table>
<thead>
<tr>
<th>ROLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td>Operations</td>
</tr>
<tr>
<td></td>
<td>Orders</td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
</tr>
<tr>
<td></td>
<td>Shipments</td>
</tr>
<tr>
<td></td>
<td>Credit Memos</td>
</tr>
<tr>
<td></td>
<td>Billing Agreements</td>
</tr>
<tr>
<td></td>
<td>Transactions</td>
</tr>
<tr>
<td>Archive</td>
<td></td>
</tr>
<tr>
<td>Catalog</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Products</td>
</tr>
<tr>
<td></td>
<td>Categories</td>
</tr>
<tr>
<td>Carts</td>
<td>Shopping Cart Management</td>
</tr>
<tr>
<td>Customers</td>
<td>All Customers</td>
</tr>
</tbody>
</table>
### Role Resources (cont.)

<table>
<thead>
<tr>
<th>ROLE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now Online</td>
<td></td>
</tr>
<tr>
<td>Companies</td>
<td></td>
</tr>
<tr>
<td>Marketing</td>
<td>Promotions</td>
</tr>
<tr>
<td></td>
<td>Catalog Price Rule</td>
</tr>
<tr>
<td></td>
<td>Cart Price Rules</td>
</tr>
<tr>
<td></td>
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## Role Resources (cont.)

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<td><strong>Permissions</strong></td>
<td>All Users</td>
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<td>Locked Users</td>
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<td>User Roles</td>
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<td><strong>Action Log</strong></td>
<td>Report</td>
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<td><strong>Other Settings</strong></td>
<td>Notifications</td>
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<td>Custom Variables</td>
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<td></td>
<td>Manage Encryption Key</td>
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<tr>
<td><strong>Global Search</strong></td>
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</tbody>
</table>
Alternate Media Storage

Magento for B2B 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)](image)

   **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

A Content Delivery Network (CDN) can be used to store media files. Although the version of Magento that is installed “on premise” does not include an integration with any specific CDN, you can use the CDN of your choice. Magento Commerce (Cloud) is an exception to this, and includes the Fastly CDN. To learn more, see Fastly in the Magento developer documentation.

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](image)

   **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 110:

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 Scan
- Security Best Practices
- Configuring Admin Security
- CAPTCHA
- Encryption Key
- Browser Capabilities Detection
- Action Log

Make sure to set up a Security Scan for each domain in your Magento installation. Also, visit the Security Center and join the Security Alert Registry for the latest news about potential vulnerabilities and best practices.
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. For technical information, see Go live and launch in the developer documentation.

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.
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.

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.
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.

   ![Set Automatic Security Scan: Scan Weekly](image)

   **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.

   ![Set Automatic Security Scan: Scan Daily](image)

   **Scan Daily**

7. Enter the **Email Address** where you want to receive notifications of completed scans and security updates.
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 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 a 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.

- 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.

UPGRADE. For additional peace of mind that comes from 24/7 support, plan your upgrade now to Magento Commerce Cloud.
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.” By default, passwords that are used to log in to the Admin must be seven or more characters long, and include both letters and numbers. 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.

For technical information, see Security overview in the developer documentation.
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:

<table>
<thead>
<tr>
<th>Forced</th>
<th>Requires that Admin users change their passwords after the account is set up.</th>
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</thead>
<tbody>
<tr>
<td>Recommended</td>
<td>Recommends that Admin users change their passwords after account is set up.</td>
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</table>

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

### Admin Password Requirements

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<th>DESCRIPTION</th>
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<tbody>
<tr>
<td>Password</td>
<td>By default, an Admin password must be seven or more characters long, and include both letters and numbers.</td>
</tr>
</tbody>
</table>
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 to appear every time, or only after a number of failed login attempts.

![Customer Login with CAPTCHA](image-url)
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.

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:
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.)

**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 use 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 includes 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 page must be refreshed 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**.
Customer CAPTCHA Configuration

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.
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.
Step 1: Install Google reCAPTCHA

Google reCAPTCHA is installed with Magento Open Source and Commerce v2.2.9. Continue to Step 2.

For Magento Open Source and Commerce v2.2.8 and earlier, follow the instructions in Magento DevDocs to install and troubleshoot the extension. At this time, Google reCAPTCHA can be installed only 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.
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](image)

**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
4. Expand (✓) the **Backend** section, and do the following:

a. Set **Enable** to “Yes.”

b. To change the **Theme**, clear the **Use system value** checkbox. Then, choose one of the following:
   - Light
   - Dark

c. To change the **Size**, clear the **Use system value** checkbox. Then, choose one of the following:
   - Normal
   - Compact
5. Expand ( ) the **Frontend** section. Then, do the following to add reCAPTCHA to customer accounts:

![Google reCAPTCHA Frontend](image)

**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

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. (Optional) For Force Providers, select the authenticators you require for all users. To allow users to select their own authenticator, do not select an option.
5. 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.

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.

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](image)

**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.

![Configuration reset](image)

*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.
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

```bash
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

```bash
php bin/magento msp:security:tfa:reset <username> <provider>
```

Examples

Reset Google Authenticator

```bash
php bin/magento msp:security:tfa:reset admin google
```

Reset U2F Device

```bash
php bin/magento msp:security:tfa:reset admin u2fkey
```

Reset Authenticator

```bash
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.

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.

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.

[Image of 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]

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.

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.
Step 2: Sign In with Authy

1. Enter Magento Admin account credentials and sign in.

   ![Authy access](image)

   **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 accounti.

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.
c. When prompted to install Duo Mobile for your phone type, tap *I have Duo Mobile*.

3. Open Duo Mobile, and scan the **QR code** to sync the authenticator with Magento. A checkmark appears when the activation is complete.
To configure your settings for the device, choose the action that you want to take place when you sign in.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ask me to choose an authenticator method</td>
<td>Allows the user to select when logging in and authenticating in the Magento Admin.</td>
</tr>
<tr>
<td>Automatically send this device a Duo Push</td>
<td>Sends a message to your device to accept or deny for access.</td>
</tr>
<tr>
<td>Automatically call this device</td>
<td>Calls and provides a passcode for entering</td>
</tr>
</tbody>
</table>

**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 Magento Admin credentials to log in.

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.
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.

For technical information, see Install the Magento software in the developer documentation.
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**.

4. Keep a record of the new key in a safe place. It will be required to decrypt the data, if any problems occur with your files.
Session Validation

Magento for B2B 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.

For technical information, see Use Redis for session storage in the developer documentation.

<table>
<thead>
<tr>
<th>Session Validation Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Validate REMOTE_ADDR</td>
</tr>
<tr>
<td>Validate HTTP_HOST</td>
</tr>
<tr>
<td>Validate HTTP_X_FORWARDED</td>
</tr>
<tr>
<td>Validate HTTP_USER_AGENT</td>
</tr>
<tr>
<td>Use SID on Storefront</td>
</tr>
</tbody>
</table>

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:

For technical information, see Supported browsers in the developer documentation.

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.”

4. When complete, tap Save Config.
CHAPTER 111: 

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.
Cache Management

CHAPTER 111: Tools

Magento for B2B Commerce User Guide 2198
**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

<table>
<thead>
<tr>
<th>CONTROL</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Actions</td>
<td>Marks the checkbox of multiple caches. Options include:</td>
</tr>
<tr>
<td></td>
<td>Select All</td>
</tr>
<tr>
<td></td>
<td>Unselect All</td>
</tr>
<tr>
<td></td>
<td>Select Visible</td>
</tr>
<tr>
<td></td>
<td>Unselect Visible</td>
</tr>
<tr>
<td>Actions</td>
<td>Determines the action to be applied to all selected caches. Options include:</td>
</tr>
<tr>
<td></td>
<td>Enable</td>
</tr>
<tr>
<td></td>
<td>Disable</td>
</tr>
<tr>
<td></td>
<td>Refresh</td>
</tr>
<tr>
<td></td>
<td>Submit</td>
</tr>
</tbody>
</table>

## Button Descriptions

<table>
<thead>
<tr>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flush Magento Cache</td>
<td>Removes all items in the default Magento cache (var/cache), according to their associated Magento tags.</td>
</tr>
<tr>
<td>Flush Cache Storage</td>
<td>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.</td>
</tr>
<tr>
<td>Flush Catalog Images Cache</td>
<td>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.</td>
</tr>
<tr>
<td>Flush JavaScript/CSS Cache</td>
<td>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.</td>
</tr>
<tr>
<td>Flush Static Files Cache</td>
<td>Removes preprocessed view files and static files.</td>
</tr>
</tbody>
</table>
### Cache Descriptions

<table>
<thead>
<tr>
<th>CACHE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration</td>
<td>Various XML configurations that were collected across modules and merged. Associated Tag: CONFIG</td>
</tr>
<tr>
<td></td>
<td><strong>System:</strong> config.xml, local.xml</td>
</tr>
<tr>
<td></td>
<td><strong>Module:</strong> config.xml</td>
</tr>
<tr>
<td>Layouts</td>
<td>Layout building instructions. Associated Tag: LAYOUT_GENERAL_CACHE_TAG</td>
</tr>
<tr>
<td>Blocks HTML output</td>
<td>Page blocks HTML. Associated Tag: BLOCK_HTML</td>
</tr>
<tr>
<td>Collections Data</td>
<td>Collection data files. Associated Tag: COLLECTION_DATA</td>
</tr>
<tr>
<td>Reflection Data</td>
<td>Clears API interface reflection data, that is typically generated during runtime.</td>
</tr>
<tr>
<td>Database DDL operations</td>
<td>Results of DDL queries, such as describing tables or indexes. Associated Tag: DB_DDL</td>
</tr>
<tr>
<td>Compiled Config</td>
<td>Results of code compilation. Associated Tag: COMPILED_CONFIG</td>
</tr>
<tr>
<td>EAV types and attributes</td>
<td>Entity types declaration cache. Associated Tag: EAV</td>
</tr>
<tr>
<td>Customer Notification</td>
<td>Temporary notifications that appear in the user interface.</td>
</tr>
<tr>
<td>Integrations Configuration</td>
<td>Integration configuration file. Associated Tag: INTEGRATION</td>
</tr>
<tr>
<td>Integrations API Configuration</td>
<td>Integrations API configuration file. Associated Tag: INTEGRATION_API_CONFIG</td>
</tr>
<tr>
<td>Page Cache</td>
<td>Full page caching. Associated Tag: FPC</td>
</tr>
<tr>
<td>Translations</td>
<td>Translation files. Associated Tag: TRANSLATE</td>
</tr>
<tr>
<td>Web Services Configuration</td>
<td>REST and SOAP configurations, generated WSDL file. Associated Tag: WEBSERVICE</td>
</tr>
</tbody>
</table>

### Cache Management Role Resources

<table>
<thead>
<tr>
<th>RESOURCE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cache Management</td>
<td>Clean Cache Actions</td>
</tr>
<tr>
<td></td>
<td><strong>Flush Cache Storage</strong></td>
</tr>
</tbody>
</table>

__Magento for B2B Commerce User Guide__
Cache Management Role Resources (cont.)

<table>
<thead>
<tr>
<th>RESOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fluch Magento Cache</td>
</tr>
<tr>
<td>Cache Type Management</td>
</tr>
<tr>
<td>Toggle Cache Type</td>
</tr>
<tr>
<td>Refresh Cache Type</td>
</tr>
<tr>
<td>Additional Cache Management</td>
</tr>
<tr>
<td>Catalog Images Cache</td>
</tr>
<tr>
<td>Flush Js/Css</td>
</tr>
<tr>
<td>Flush Static Files</td>
</tr>
</tbody>
</table>
Full-Page Cache

Magento for B2B 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.

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.

For technical information, see Configure and Use Varnish and Use Redis for the Magento page and default cache in the developer documentation.

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.
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

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

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indexer</td>
<td>The name of the indexer.</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the indexer.</td>
</tr>
<tr>
<td>Mode</td>
<td>Indicates the current update mode for each indexer. Options:</td>
</tr>
</tbody>
</table>
## Column Descriptions (cont.)

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update on Save</td>
<td>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.</td>
</tr>
<tr>
<td>Update on Schedule</td>
<td>The index is set to update on schedule according to cron jobs. The cron job includes the schedule interval for reindexing, writing updates to the index when run.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Displays one of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready</td>
<td>The index is up-to-date.</td>
</tr>
<tr>
<td>Scheduled</td>
<td>Reindexing is scheduled to take place.</td>
</tr>
<tr>
<td>Running</td>
<td>Reindexing is currently running.</td>
</tr>
<tr>
<td>Reindex Required</td>
<td>A change has been made that requires reindexing, but the indexers cannot be updated automatically. Check to see if cron is available and configured correctly.</td>
</tr>
</tbody>
</table>

| 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

<table>
<thead>
<tr>
<th>INDEX TYPE</th>
<th>REINDEXING EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Prices</td>
<td>Add customer group</td>
</tr>
<tr>
<td></td>
<td>Change configuration settings</td>
</tr>
<tr>
<td>Flat catalog(^1) product data</td>
<td>Add store</td>
</tr>
<tr>
<td></td>
<td>Add store group</td>
</tr>
<tr>
<td></td>
<td>Add, edit, or delete attribute (for searching and filtering)</td>
</tr>
<tr>
<td>Flat catalog category data</td>
<td>Add store</td>
</tr>
<tr>
<td></td>
<td>Add store group</td>
</tr>
<tr>
<td></td>
<td>Add, edit, or delete attribute (for searching and filtering)</td>
</tr>
<tr>
<td>Catalog category/product index</td>
<td>Add, edit, or delete products (single, mass, and import)</td>
</tr>
<tr>
<td></td>
<td>Change product-to-category relations</td>
</tr>
<tr>
<td></td>
<td>Add, edit, or delete categories</td>
</tr>
<tr>
<td></td>
<td>Add or delete stores</td>
</tr>
<tr>
<td></td>
<td>Delete store groups</td>
</tr>
<tr>
<td></td>
<td>Delete websites</td>
</tr>
<tr>
<td>Catalog search index</td>
<td>Add, edit, or delete products (single, mass, and import)</td>
</tr>
<tr>
<td></td>
<td>Add or delete stores</td>
</tr>
<tr>
<td></td>
<td>Delete store groups</td>
</tr>
<tr>
<td></td>
<td>Delete websites</td>
</tr>
<tr>
<td>Stock status index</td>
<td>Change inventory configuration settings</td>
</tr>
<tr>
<td>Category permissions index</td>
<td>Add store, add store group, add or delete or update attribute (for searching and filtering)</td>
</tr>
</tbody>
</table>

\(^1\) 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

<table>
<thead>
<tr>
<th>ACTION</th>
<th>RESULT</th>
<th>TO CONTROL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a new store, new customer group, or any action listed in “Actions that Cause a Full Reindex.”</td>
<td>Full reindex</td>
<td>Full reindexing is performed on the schedule determined by your Magento cron job.</td>
</tr>
</tbody>
</table>

Bulk loading of items in the following ways:
- Magento import/export
- Direct SQL query
- Any other method that directly adds, changes, or deletes data.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>RESULT</th>
<th>TO CONTROL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changing scope (for example, from global to website)</td>
<td>Partial reindex (only changed items are reindexed)</td>
<td>At the frequency determined by your Magento cron job.</td>
</tr>
</tbody>
</table>

Events that Trigger Full Reindexing

Full Reindex Triggers

<table>
<thead>
<tr>
<th>INDEXER</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Category Flat Indexer</td>
<td>Create a new web store</td>
</tr>
<tr>
<td></td>
<td>Create a new web store view</td>
</tr>
<tr>
<td></td>
<td>Create, or delete an attribute that is any of the following:</td>
</tr>
<tr>
<td></td>
<td>- Searchable or visible in advanced search</td>
</tr>
<tr>
<td></td>
<td>- Filterable</td>
</tr>
<tr>
<td></td>
<td>- Filterable in search</td>
</tr>
<tr>
<td></td>
<td>- Used for sorting</td>
</tr>
<tr>
<td></td>
<td>Change an existing attribute to be any of the preceding.</td>
</tr>
<tr>
<td></td>
<td>Enable flat category storefront options</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INDEXER</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog Product Flat Indexer</td>
<td>Create a new web store</td>
</tr>
<tr>
<td></td>
<td>Create a new web store view</td>
</tr>
<tr>
<td></td>
<td>Create, or delete an attribute that is any of the following:</td>
</tr>
</tbody>
</table>
### Full Reindex Triggers (cont.)

<table>
<thead>
<tr>
<th>INDEXER</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Searchable or visible in advanced search</td>
</tr>
<tr>
<td></td>
<td>• Filterable</td>
</tr>
<tr>
<td></td>
<td>• Filterable in search</td>
</tr>
<tr>
<td></td>
<td>• Used for sorting</td>
</tr>
<tr>
<td></td>
<td>Change an existing attribute to be any of the preceding.</td>
</tr>
<tr>
<td></td>
<td>Enable flat category storefront options</td>
</tr>
<tr>
<td>Stock status indexer</td>
<td>When the following Catalog Inventory options change in the system configuration:</td>
</tr>
<tr>
<td></td>
<td>Stock Options</td>
</tr>
<tr>
<td></td>
<td>Product Stock Options</td>
</tr>
<tr>
<td>Price Indexer</td>
<td>Adding a new customer group.</td>
</tr>
<tr>
<td></td>
<td>When any of the following Catalog Inventory options change in the system configuration:</td>
</tr>
<tr>
<td></td>
<td>Stock Options</td>
</tr>
<tr>
<td></td>
<td>Product Stock Options</td>
</tr>
<tr>
<td></td>
<td>Price</td>
</tr>
<tr>
<td>Category or Product Indexer</td>
<td>Create or delete a store view</td>
</tr>
<tr>
<td></td>
<td>Delete a store</td>
</tr>
<tr>
<td></td>
<td>Delete a website</td>
</tr>
</tbody>
</table>
Backups

Magento for B2B 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 v2.2.7. We recommend that all merchants investigate additional backup technologies and binary backup tools (such as Percona XtraBackup).
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. For technical information, see: Set 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.

```xml
Cron (Scheduled Tasks)
For correct URLs generated during cron runs please make sure that Web > Secure and Unsecure Base URLs are explicitly set. All the times are in minutes.

- Cron configuration options for group: index
- Cron configuration options for group: default

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

![Cron configuration options for group: Index](image)

*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.

- Action Logs
- Amazon Logs
- Frontend Development Workflow
- Using Static File Signatures
- File Optimization
- Developer Client Restrictions
- Template Path Hints
- Translate Inline
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.

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 for each action, do the following:
   - To enable admin logging for the action, mark the checkbox.
   - To disable admin logging for the action, clear the checkbox.
4. When complete, tap Save Config.

Action Log Report

The Action Log report keeps a detailed record of all admin actions. Each record is time stamped, and records the IP address and name of the user. The log detail includes admin user data and related changes that were made during the action.
To view the log:

1. On the Admin sidebar, tap **System**.

2. Under **Actions Logs**, choose **Report**.

3. To view the full details of a report action, click **View**.
Archive

The Admin Actions archive lists the CSV log files that are stored on the server. In the configuration, you can specify how long the log entries are stored, and how often they are archived. By default, the file name includes the current date in ISO format: yyyyMMddHH.

Log archiving requires a cron job to be set up.

To configure the log archive:

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.

To view the archive:

1. On the Admin sidebar, tap System.
2. Under Actions Logs, choose Archive.
Bulk Actions

The Bulk Actions Log records the details of asynchronous mass operations that run in the background, such as import/export, or assigning custom prices to multiple products in a shared catalog.

To configure bulk actions:
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 Bulk Actions section.
4. In the Days Saved in Log field, enter the number of days that bulk actions are saved in a log.
5. When complete, tap **Save Config**.

To view bulk actions:
1. Find the action in the log.
2. In the Action column, click **Details**.

### Amazon Pay Logs

The Amazon Pay extension collects and provides viewable and downloadable logs for Client and IPN tracked access and actions. Logs generate if you have the logging feature enabled in Amazon Pay store configuration. For details, see the Developer Options section for Amazon Pay configurations.

Amazon Pay logs the following information:

- **Client Logs**: Logs all API calls and responses.
- **INP Logs**: Logs all Instant Payment Notifications that are sent by Amazon.

To display and download Amazon Logs:
1. On the Admin sidebar, choose **Stores**. Under Settings, choose **Configuration**.
2. Expand the **Advanced** section, then expand **Developer Options**.
3. If logs generated, select a link to download to view Client and IPN logs.

   If logs are not available or have not been generated, a message displays "No logs are currently available."
Amazon Pay Developer Options

- **Developer Options**
  - **Logging (global):** Yes
  - **Allowed IPs (website):** Comma separated. The "Login with Amazon" and "Amazon Pay" buttons will only be rendered for clients having the above IPs. If the field is empty, the buttons will be visible to all clients.

- **Developer Logs:**
  - Client Logs
  - IPN Logs

*Amazon Pay Developer Options*
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.

For technical information, see Client-side LESS compilation vs. server-side in the developer documentation.

The Frontend Development Workflow configuration is available in Developer Mode only.

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.

For technical information, see Static content signing in the developer documentation.

The Static File Settings configuration is available only when working in developer mode.

---

**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.

For technical information, see Magento Optimization Guide in the developer documentation.

CSS and JavaScript files can be optimized in Developer Mode only.

<table>
<thead>
<tr>
<th>FILE TYPE</th>
<th>SUPPORTED OPERATIONS</th>
</tr>
</thead>
</table>
| CSS Files          | • Merge
                   | • Minify             |
| JavaScript Files   | • Merge
                   | • Bundle
                   | • Minify             |
| Template Files     | • Minify             |
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.”

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.”

5. To minify PHTML template files, do the following:
a. Expand the Template Settings section.

b. Set Minify Html to “Yes.”

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.

Developer Client Restrictions can be set in Developer Mode only.

For technical information, see Custom whitelist VCL in the developer documentation.

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.
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 can be edited in Developer Mode only.

For technical information, see Locate templates, layouts, and styles in the developer documentation.

![Template Path Hints in Storefront](image)

**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](image)
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:

   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 in developer mode to touch up text in the interface 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.”

The Translate Inline tool is available only when working in developer mode.

For technical information, see Translations overview in the developer documentation.

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:
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.

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](image)

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.
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.
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 Tools

Extension Manager

Extension 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.

Module Manager

Module Manager lists the components and modules that are currently installed in your Magento 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.
Extension 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.

For technical information, see Run the Extension Manager 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.

3. Tap Extension Manager. To get your access keys, do the following:
   a. Go to Magento Marketplace. Then in the upper-right corner, log into your account.
c. If you need to generate a new set of access keys, tap **Create a New Access Key**.

d. Find the set of access keys in the list. Then, copy and paste your **Public Key** and **Private Key** into Extension Manager.

e. Tap **Submit**.

![Extension Manager](image)

**Extension Manager**

It will take a few minutes to generate the summary and list of all available updates, recently purchased extensions, and currently installed extensions and sample data.

![Summary of Your Marketplace Account](image)

**Summary of Your Marketplace Account**

4. In the summary at the top of the page, under **Extensions Ready to Install**, tap **Review and Install**. Then, do the following:
a. In the list of extensions that are ready to install, mark the checkbox of the extension that you want to install.

![Extensions Ready to Install](image)

b. In the **Latest version** column, choose the version that you want to install. Then in the **Action** column, click **Install**.

5. Follow the onscreen instructions to complete the following:
   - Step 1: Readiness Check
   - Step 2: Create Backup
   - Step 3: Component Install

**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](image)

2. When the Readiness Check completes successfully, tap **Next**.
Setup Tools

CHAPTER 111: Tools

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.

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.
2. When complete, tap **Back to Setup Tool**. Then, tap the **System Configuration** tile.

3. In the upper-right corner of Extension Manager, click the **Reset** link to log out.

4. **Flush the cache** after installing and enabling the module.

**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.

**Module Manager**

Module Manager lists the components and modules that are currently installed in your Magento system. Before a module is disabled, the system completes a readiness check and creates a backup.

- The colored dot in the first column indicates if the module is currently “on” or “off”.
- Click the down arrow before the component name to list any dependent packages that are associated with the module.

For technical information, see Run the Module Manager in the developer documentation.

**Important:** Always **flush the cache** after installing or upgrading Magento, or any extensions and modules.
To disable a module:

1. Find the module in the list.

2. In the Action column, click Select. Then, click Disable, and do the following:
   a. Under Step 1: Readiness Check, tap Start Readiness Check to verify that your installation has the correct version of PHP and required extensions and file permissions.

A module with dependent components will fail Readiness Check.

Readiness Check

When the readiness check is complete, do one of the following:

- Tap Next.
- Correct any issues, and Try Again.

Readiness Check Complete

b. Under Step 2, mark the checkbox of each Backup Option that you want to include. Then, tap Create Backup.
**Create Backup**

Before the backup is created, the available disk space is checked, and the store is placed in maintenance mode. It might take several minutes — or more — to create the backup, depending on the size of your database.

When the backup is complete, tap Next.

**Backup Complete**

c. Under Step 3, tap Disable.

Your store is taken offline while the module is disabled.
d. As the process is running, the details appear in the box below. To toggle the display of the log, tap **Console Log**.

e. When the **Success** page appears, the module is disabled and your store returns to production mode. Tap **Back to Setup Tool** to return to Module Manager.

![Success](image)

**Success**

In the Module Manager list, the red dot in the first column means the module is now disabled.

![Module Manager](image)

**Module Disabled**

**To enable a module:**

1. Find the module in the list.

2. In the **Action** column, click **Select**. Then, click **Enable** and do the following:
a. Under **Step 1**, tap **Start Readiness Check**.

![Enable Module](image1)

**Enable Module**

When the readiness check is complete, do one of the following:

- Tap **Next**.
- Correct any issues, and try **Again**.

b. Under **Step 2**, mark the checkbox of each **Backup Option** that you want to include. Then, tap **Create Backup**.

![Create Backup](image2)

**Create Backup**

c. When the backup is complete, tap **Next**.

d. Under **Step 3**, tap **Enable**.

![Enable Module](image3)

**Enable Module**
e. As the process is running, the details appear in the box below. To toggle the display of the log, tap **Console Log**.

f. When the **Success** page appears, the module is enabled and your store returns to production mode. Tap **Back to Setup Tool** to return to Module Manager.

3. **Flush the cache** after installing and enabling the module.

**System Upgrade**

The System Upgrade tool can be used to upgrade your Magento installation from the Admin. The upgrade is a three-step process that should take place during off-peak hours. Before upgrade takes place, your store is put into maintenance mode, checked for readiness, and backed up.

We strongly recommend reviewing the latest release notes and system requirements.

**Upgrade Requirements**

- Only the primary account holder is authorized to download code from the repository.
- The authorization keys that are used to download code must be generated from the primary account.
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 2.1.X to 2.2.X and upgrading from Magento Open Source 2.2.X to Magento Commerce 2.2.X.

**Important:** Always flush the cache after installing or upgrading Magento, or any extensions and modules.

For developer information on upgrades, see the DevDocs Command Line Upgrade. The upgrade instructions include scripts to help run and complete your upgrades. These steps will require developer assistance.

**System Upgrade**

**To upgrade your Magento installation:**

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.
3. Tap Extension Manager.
4. When prompted, follow the instructions to copy and paste the **Public Access Key** and **Private Access Key** from your Marketplace account. Then, tap **Submit**.

5. Follow the onscreen instructions to complete the following steps:
   - Step 1: Select Version
   - Step 2: Create Backup
   - Step 3: System Upgrade.

6. Flush the **cache** and **reindex** when complete.
System Config

To sync and add extensions, modules, and components from Magento Marketplace to your Magento Admin, you need to add and sync Marketplace access keys. The System Config page of the Web Setup Wizard saves you to add these keys and sync with Marketplace.

You need to generate, copy, and paste Marketplace access keys from your Marketplace account to the Magento Admin. Once added, the services will remain in sync, including your purchased and added extensions.

To synchronize Magento and Marketplace:

1. Sign in to your Magento Marketplace account.
2. To access your Magento authentication keys, tap the Developer tab then Access Keys.
3. Copy the Public Access Key and Private Access Key from your Marketplace account.
4. In the Magento Admin, tap System > Web Setup Wizard, and then tap System Configuration.

Add Access Keys

5. Then, tap Submit. The keys are saved, only revealing the public key.
CHAPTER 112: 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
- System Reports
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.

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.
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.
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

<table>
<thead>
<tr>
<th>REPORT GROUP</th>
<th>INFORMATION INCLUDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Magento Version</td>
</tr>
<tr>
<td></td>
<td>Data Count</td>
</tr>
<tr>
<td></td>
<td>Cache Status</td>
</tr>
<tr>
<td></td>
<td>Index Status</td>
</tr>
<tr>
<td>Environment</td>
<td>Environment Information</td>
</tr>
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<td></td>
<td>MySQL Status</td>
</tr>
<tr>
<td>Modules</td>
<td>Custom Modules List</td>
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<td>Disabled Modules List</td>
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<td>Data from app/etc/env.php</td>
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<td>Payments Functionality Matrix</td>
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<td>Top System Messages</td>
</tr>
<tr>
<td></td>
<td>Today's Top System Messages</td>
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<td></td>
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<td>New Eav Attributes</td>
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<td>Custom Frontend Events</td>
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## System Reports (cont.)

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<tr>
<th>REPORT GROUP</th>
<th>INFORMATION INCLUDED</th>
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<td>Customer Doc Events</td>
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<td>Custom Crontab Events</td>
<td></td>
</tr>
<tr>
<td>Custom REST Events</td>
<td></td>
</tr>
<tr>
<td>Custom SOAP Events</td>
<td></td>
</tr>
<tr>
<td>Core Global Events</td>
<td></td>
</tr>
<tr>
<td>Core Admin Events</td>
<td></td>
</tr>
<tr>
<td>Core Frontend Events</td>
<td></td>
</tr>
<tr>
<td>Core Doc Events</td>
<td></td>
</tr>
<tr>
<td>Core Crontab Events</td>
<td></td>
</tr>
<tr>
<td>Corre REST Events</td>
<td></td>
</tr>
<tr>
<td>Core SOAP Events</td>
<td></td>
</tr>
<tr>
<td>All Global Events</td>
<td></td>
</tr>
<tr>
<td>All Admin Events</td>
<td></td>
</tr>
<tr>
<td>All Frontend Events</td>
<td></td>
</tr>
<tr>
<td>All Doc Events</td>
<td></td>
</tr>
<tr>
<td>All REST Events</td>
<td></td>
</tr>
<tr>
<td>All SOAP Events</td>
<td></td>
</tr>
<tr>
<td>Cron Schedules by status code</td>
<td></td>
</tr>
<tr>
<td>Cron Schedules by job code</td>
<td></td>
</tr>
<tr>
<td>Errors in Cron Schedules Queue</td>
<td></td>
</tr>
<tr>
<td>Cron Schedules List</td>
<td></td>
</tr>
<tr>
<td>Custom Global Cron Jobs</td>
<td></td>
</tr>
<tr>
<td>Custom Configurable Cron Jobs</td>
<td></td>
</tr>
<tr>
<td>Core Global Cron Jobs</td>
<td></td>
</tr>
<tr>
<td>Core Configurable Cron Jobs</td>
<td></td>
</tr>
<tr>
<td>All Global Cron Jobs</td>
<td></td>
</tr>
<tr>
<td>All Configurable Cron Jobs</td>
<td></td>
</tr>
<tr>
<td>Adminhtml Themes List</td>
<td></td>
</tr>
<tr>
<td>Frontend Themes List</td>
<td></td>
</tr>
<tr>
<td>Website Tree</td>
<td></td>
</tr>
<tr>
<td>Websites List</td>
<td></td>
</tr>
<tr>
<td>Stores List</td>
<td></td>
</tr>
<tr>
<td>Store Views List</td>
<td></td>
</tr>
</tbody>
</table>
Appendices
Contents

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 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, clarifications, and corrections 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!

### August 2019

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Topics</td>
<td>Discount with First Purchase</td>
</tr>
<tr>
<td>Updated Topics</td>
<td>Creating a Customer Segment</td>
</tr>
<tr>
<td></td>
<td>Updated formatting and images.</td>
</tr>
</tbody>
</table>
APPENDIX C:

Glossary

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.

Company Account
A customer account that accommodates teams of users with various roles and permissions. A company account is managed by the Company Administrator, who defines the company structure and maintains the account.

Company Administrator
A company representative who has responsibility to set up and maintain the company account from the storefront.

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 multimedia 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.

**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

invoice
A document that provides a detailed description of a purchase, including products purchased, quantity, price, shipping cost, sales tax, and total.

J

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

keyword
A term or phrase used in a search to filter for content that is of significant importance to that term or phrase.

L

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.
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.

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.

opt-in
The process by which a user consents to receiving emails from an online store.

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.

Payment on Account
An offline payment method that allows customers to charge purchases to their account, up to the credit limit that is specified in their profile. Payment on Account can be enabled globally or for a specific company.

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.

Quote
A request for discount pricing submitted by a company buyer. The order is placed after buyer and seller reach agreement on a negotiated price.

redirect
A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

Reimburse Balance
Payment that is made by a company toward the balance on their account.

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.

Requisition List
A list of frequently ordered products that can be added directly to the shopping cart. Depending on the configuration, up to 999 requisition lists can be maintained per company account.

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.

**Sales Representative**
An Admin user who is assigned as the primary contact for a company account.

**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.

**Shared Catalog**
A subset of your catalog that includes a curated selection of products with discount pricing. Access to a shared catalog can be limited to a specific company, or be available to the public.

**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.
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 for B2B 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
- Dotmailer
- Services
- Advanced

![Configuration](image-url)


**APPENDIX E:**

**Magento Extensions**

This section provides installation instructions and information for extensions developed and released by Magento. Many of these extensions are developed through Magento Community contributions.

**Google reCAPTCHA**

Google reCAPTCHA ensures that a human being, rather than a computer, is interacting with your site. Enable and configure reCAPTCHA using invisible or interactive checks to enhance secure access to the Magento Admin and storefront.

If the extension is not installed, follow the instructions in Magento DevDocs to install and troubleshoot the extension. To install the Google reCAPTCHA extension, you may require developer assistance.

**Magento Community Contribution** - Magento thanks Riccardo Tempesta of MageSpecialist for contributing these features as part of the Magento Community Engineering program.

**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.

To install the Two-Factor Authentication extension, you may require developer assistance. Follow the instructions in Magento DevDocs to install and troubleshoot the extension.

**Magento Community Contribution** - Magento thanks Riccardo Tempesta of MageSpecialist for contributing these features as part of the Magento Community Engineering program.
### Google Shopping ads Channel

Google Shopping ads Channel syncs your Magento product catalog and other information with your Google Merchant Center (GMC) and Ads accounts to promote and sell products.

- [Install and upgrade guide](#)
- [Release notes](#)

### Amazon Sales Channel

Amazon Sales Channel enables you to integrate your catalog with Amazon Seller Accounts to seamlessly sell products in the Amazon Marketplace.

- [Install and upgrade guide](#)
- [Release notes](#)
Index

1

1 Column Layout 374, 1213, 1215

2

2 Columns
with Left Bar 375, 1213, 1216
with Right Bar 375, 1213

2FA 2175

3

3 Column Layout 1214, 1217

4

404 Page Not Found 1123-1124

5

503 Service Unavailable 1123

A

Abandoned carts 1448
Access Denied 1376

Account
Company 1347
customer information 1300-1301
Magento 15
share 19
Account, Magento 16
Action Log 2218
Archive 2220
Report 2218
Actions
control 73, 90
Actions, Mass 92
Add
Banner 1176
Address
Book, customer 1300
Address format 668, 2045
Address templates 668, 2045
Address, customer 1271
Adjustment Fee 1572
Admin 66, 90
access 2130
account 69
account, unlock 2135
Actions Log 2218
CAPTCHA 2164
logged out 95
login 66
Notifications 82
permissions 2130
reCAPTCHA 2169
role 2131
role, create 2134
role, custom 2136
security 2148
session lifetime 95
sidebar 70
Startup Page 80
Startup Page, change 72
URL, custom 1947
user 2131
user, create 2131
Admin Actions
Archive 2220
Admin Startup Page 70
Administrator
Company 1358
Advanced Admin, configuration 67
Advanced Pricing 284
Attributes 2117
Advanced Product Settings 256
Advanced Search 727
Advocacy Tools 54
All Customers 1261
All Stores 1926
Allow
cookies 1448
Countries 101
HTML Tags on Frontend 2051
Allow Reorder 1435
Allowed Currencies 2020
Alternate Media Storage 2142
Amazon Store
Setup 889
Analytics 46.54
Anchor
category 1181
Anchor category 354
Android, email 588
Antivirus software 143
AOV 48
API 55, 2122
APNG file format 120
Append Complex Data 2094, 2097
Apple Mail 588
Approve product review 464-465
Archive 1609
Admin actions 2220
Assisted Shopping 1455
Asynchronous indexing 1528
Attribute
code 2049
Customer 2119
entities 2077
filterable 716
group 398
input types 398
predefined 685
Index

Product, reference 2104
Product, create 385
Returns 1601
system 397
Attribute set 192
Attribute Set 396
Attributes 2026
Customer 2027
Date and Time 400
Product 383
product, add 390
Australia, PayPal solutions 1683
Authorize.Net
Direct Post Method 1718
Auto-generated fields 181
Automatic
redirect 763
refund 1585
Automatic Sort 371
Automatic Sort, Visual Merchandiser 370
Autosettings, product 279
Average Order Value 48

B
B2B basics 58
B2B Configuration 64
B2B Features, configure 60
B2B Quick Start 24
B2B Sites 572
Backend See also
Admin 66
Backup
delete 2213
Bank Transfer Payment 1744
Banner
create 1176
Customer Segment 1406
Customer Segments 1404
locations 1179
price rule 1183
rotator 1180
Base
currency 2024
image 327
JavaScript URL 2146-2147
media URL 2146-2147
Base URL 1942
Base URL Home page 1124
Best practice
industry 142
Best practices
Security 2153
Best Practices
Product Attributes 384
Product Categories 346
Bestsellers 81
Billing
agreement 1301
agreement, PayPal Express Checkout 1631
Billing Agreements 1602
Block 685
category 361, 374
create 1162
ID, markup tag 690
Cancel
  order 1470
CANCELED ORDER  status 1520
Canonical meta tag 170, 751
CAPTCHA 2164, 2169
  configuration, Admin 2165
  configuration, store 2167
Capture
  Offline 1537
Cardholder data 143
Cart
  Configuration 1427
  Link 1428
  Sidebar 1428-1429
Cart contents, retrieve 1448
Cart, manage 1456
Cash On Delivery 1740
Catagories 345
Catalog 55
  Category Link 1186
  Event Widget 571
Events 571
flat 403
images 323
indexing 403
New Products List 1186
Price Rules 469, 471
Price Scope 411
Product Link 1186
Shared, add products 430
Shared, assign 426
Shared, manage 429

C
Cache 2197
  JavaScript 2200
  Storage Management 2197
Callout 1173
Campaign, edit 1251
Campaign, preview 1254
Canada
  Example Tax Configuration 2005
Canada, PayPal solutions 1683
Canadian tax 2000
Index

Catalog page 36
Catalog Prices, display 1980
Catalog Prices, tax 2000
Catalog, menu 167
Catalog, shared 409
Catalog, shared, create 412
Categories
  Custom Design 375
  Display Settings 361
  Events 569
  Scheduled Changes 359
Category
  Automatic Sorting 368
  Content Settings 360
    create 347
  Display Settings 361
    grayed out 347
  ID 347
  landing page 374
  modify 358
  page 361
  path, in URL 170, 751
  Products 364, 532
    root 354
  Search Engine Optimization 362
    tree 347
  URL key 347
Category hidden 337
Category Permissions 376
  Events 569
  Category Products 174-175, 367, 534, 1126, 1504
Category Rule 372
Category rules 367, 538
Category Rules 535
Category structure, best practices 346
CDN 2145
  JavaScript use 2145
  media retrieval 2145
Certification 6
Change Log 2264
Channels 880, 882
  Amazon Sales 880, 882
  Sales 880, 882
Check / Money Order 1738
Checkbox 73
Checkout 1471
  Configuration 1475
  Payments 1473
  Shipping 1472
Checkout Options 1476
Checkout process 50
  Terms and Conditions 1478
Checkout Totals, sort order 1482
Checkout with PayPal 1616
Chrome, email 589
Clear cache 2197
Client Restrictions, Developer 2229
Closed, order status 1520
Club, membership 568
CMS 47, 1116
  Page Link 1186
  Page Versioning 1150
  Pages 1121, 1135
Static Block 1186
Widget 1188
COD 1740
Code
Pool, Gift Card 239, 252
Column 1212
layout 374, 1173
sort 86
Combine, Search Type 731
Combined Gift Card 239
Comma-separated values 2061
Community 54
Company
Account, approve 1361
Account, status 1361
Administrator 1358
Assign users 1372
Credit 1353, 1588
Credit, make payment 1590
Payment on Account 1742
Profile, update 1388
Roles and Permissions 1376
Roles, assign to user 1379
Sales Representative 1360
Structure 1363
Teams 1363
Users 1365, 1369
Company account 1347
Company account, create 1348
Company account, manage 1381
Company, enable 60
Compare Products 446, 461, 2050
Comparison operator 474, 930, 1007
Complete, order status 1520, 1533
Complex data 2115
Compliance, industry 142
Conditions, price rule 488
Configurable Product 184, 191
create 192
image 203
Configurable Product, configurations 196
Configuration 1950, 2278
Cart 1427
search, default 731, 733
security 2148
Configuration, Design 1204
Configurations, add 196
Configurations, Product 260
Configure
Admin Security 2161
Consent, cookies 153
Consistent prices 1962
Consulting 6
Contact Us 107
form 690
Content 1114, 1116, 1121
Area 1179
Delivery Network 2145
management system 47
menu 70
page 1135
Content Staging 1242
Content, Product 259
Conversion page 797
Conversion tracking 790
Cookie
domain 155
law 153
lifetime 155
persistent 1448
Restriction Mode 151, 153
session 1448
Cookie, Limit Sending By 448
Copyright notice 1210
Copyright Notice, change 122
Countdown ticker 569-570
Country Options 101
Coupon 48, 52, 497, 681
code 615
Coupon Usage, report 502
Create
Packages, shipping labels 1833
Store View 1927, 1931, 1938
Website 1926, 1936
Credit 1582
card 1685
Company 1588
history, show 1585
memo 1570, 1609
Credit Memo
Print 1579
Cron 2215
Cron job 403, 615
Cron Settings, orders 1527
Cross-border trade 1962
Cross-sells 265, 269, 460
rules 523
CSS
e-mail 601
CSS, merge 1238
CSV file 1609, 1771, 2061, 2077
category path 2061
customer structure 2063
structure 2061
csv separator 2061
CSV, uploa...
Index

Custom Pricing 303
Update 437
Customer
account 54, 1265, 1277
dashboard 1265
VAT Validation 1995
Account scope 136
Address 1271
address template 668, 2045
address, promotion 1398
balance, reward points 558
CSV structure 2063
engagement 47
group 1397
create 1393
reward points 565
VAT 1995
journey 44-45
Order Status, RSS feed 683
promotion 1398
Reports 1852
retention 52
segment 48
Service page 1122
Support 105
VAT 1995
Customer Account
Gift Registry 542
Update 1292
Customer Attributes 2027, 2119
Customer Group
Events 569
Customer Segment 1397
Attributes 1398
Banner 1406
Create 1399
Price Rule 1404
Customers 81, 1257
menu 70
Customers online 1262
Customers, menu 1259
CyberSource 1726

D
Dashboard 54, 78
charts 79
configuration 78
customer 1265
menu 70
Data Collector 2253
Data location 2092
Data Transfer 2060
Data Validation, import 2064
Database
and Media Backup 2214
backup 2214
compression, backup 2213
media storage 2143
Date and Time Options 400
Date, input type 399
Day of Week 99
Default
Config 127
Country 101
Index

Logo  591
message templates  610
Reminder Rules  615
Reminder Rules, template  624
template  601
template, configure  587
Email clients  588
Email template
variables  685
Email Template
  Configure  591
e-mail, browsers  589
Empty, page layout  375, 1214
Enable
  Cookies  1123
Encryption  143
Encryption Key  2194
Enhanced Ecommerce, Google  799
Enterprise Resource Planning Systems  2127
Entity Attributes  2080
Equalize
  Price Ranges, layered navigation  722
  Product Counts, layered navigation  722
ERP Systems  2127
Escape special characters  2066, 2079
EU Member Countries  1997
EU Place of Supply  1973
European Union
  Example Tax Configuration  2010
Event
  Components  569
  Configure  571
  Create  574
date, gift registry  547
Edit  574, 577
Invitations  569, 582
Selling restrictions  573
Ticker  570
Widget  569
Events  568
  log  2220
  Website Restrictions  569
Evergreen content  1116
eWAY  1730
Excel  1609
Export  2079
  failed email  2092
  product data  2079
  product types  2079
  reindex  2092
  Scheduled  2099
  Settings  2079
  Tier Price  2074, 2089
Export, criteria  2081
Export, Exclude  2082
Export, filters  2082
Expressed consent, cookies  153
Extension Manager  2238
Extensions  71, 2128
Extensions, install  2238

F

Facebook  7, 1164
Favicon  118, 1207
FedEx 1819
  shipping labels 1825
Feed reader 681
Fields, default values 181
Filter
  controls 87
Filterable
  attribute 716, 2051
Find Partners & Extensions 71
Firefox, email 589
Firewall 143
Fixed Product Tax 1974
  input type 399
Flat
  catalog 403
  setup 404
Rate Shipping 1765
Flush
  JavaScript cache 2200
  product image cache 2200
Footer 122, 1179, 1210
Forum, Magento 4.7
FPT 1974
  attribute 1976
  configuration 1975
  in attribute set 1978
  in product 1979
France, PayPal solutions 1683
Fraud Management
  PayPal 1682
Fraud Protection 1751
Free
  shipping 1763
  shipping, price rule 507
Frontend Development Workflow 2224
FTP calculations 1974
Full
  page cache, settings 2204
  reindex 2211
Fulltext, Search Type 731
G
Gateway, payment 1685
General
  Contact 105-106
Germany, PayPal 1683
GIF file type 117, 120
Gift Card 185, 239
  account 248
  account, multiple 249
  balance 249
  configure 252
  create 242
  deactivate 240
  email template 252
  expiration date 253
  partial deduction 240
  prices 244
  redeem 240
  refund 240, 1572
  status 240
Gift Card Information 282
Gift Card, printed 1441
Gift Message 1441
Gift Options 280, 1440
  Tax configuration 1446
Gift Receipt 1441
Gift Registry 540
  Configure 549
  create 543
  Customer Account 542
  event date 547
  Search 540, 552-553
  storefront 540
Gift Wrap 1441-1442
Gift Wrapping
  refund 1572
Global
  search 73, 85
 [GLOBAL] 127
Gmail 588
Goods & Services Tax 2005
Google 785
  Analytics 785
  Enhanced Ecommerce 799
Merchant Center 785
Reader 681
Sitemap 753, 785
Tag Manager 790
Universal Analytics 786, 799
Grid
  filter 87
  layout 88
  Products 173
  sort 86
Grid Settings 1528
  Grid, columns 1132
  Grid, export data 87
  Grid, Product 710
  Group price 288
  Grouped Product 184, 204
  Grouped Products 281
  GST 2005
  Guest
    retrieve cart contents 1448
  Guest Checkout 1476-1477

H
Handle 1230
Header 1179, 1209
  welcome message 121
Header template, email 602
Help 4
Hidden category 347, 357
Hierarchy 1150
  menu 1150
Hold, order 1469
Home page 34, 1122
  New Products list 1193
  Home page, create 1140
  Home page, default 1124
Hong Kong, PayPal solutions 1683
HTML
  editor 1145
  email 601
Head 1207
  in product description 2051
  product descriptions 398
Interface text, change 2232
Internet Explorer
   email 589
Inventory
   Configuration 313
   Manage Stock 311
Inventory, manage 305
Invitation
   Configure 583
   Invitations 569, 582
Invoice 92, 1609
   Comments 1533
   Create 1531
   Print 1538
Invoice order 1510
Invoiced
   order, download product 236
Invoices 1530
IP Address, Limit Sending By 448
IP address 1942
iPhone, email 588
Italy, PayPal solutions 1683
Iterative splitting, price navigation 721

J
Japan, PayPal solutions 1683
JavaScript
   cache 2200
   JavaScript, merge 1239
JPG, JPEG file type 117, 120

K
Knowledge base 4

L
Label
   shipping 1826
Landing page 739
Landing page, login 1268
Language 127
Language Pack, Add 1931
Layered navigation
   configuration 724
Layered Navigation 361, 715, 2050
   filterable 716
   Interval Division Limit 722
   product count 715
Layered Price Navigation Step 361
   layout
      update 1218
Layout
   custom 375
Layout Update 1230
   banner 1181
   syntax 1222, 1225
   widget 581, 1172, 1196
Left Column 1179
Like button, Facebook 1164
Like, Search Type 731
Link
   image 1146
LinkedIn 7
List, Product 710
Listing Sort By, category 361
Load sequence 1230
local.xml 2143
Index

Meta
Information 46, 749
Description 749
Keywords 749
page 1135
Title 749
tag, canonical 751
Millennium Generation
customer segment 1402
Mini cart 1429
Mini Cart 1428
Minify, resource files 2226
Minimum Advertised Price 297-298
Minimum Order Amount 1432
Miscellaneous
HTML 1210
Misspelled words
redirect 739
Moderate, product reviews 464-465
Module Manager 2242
Money Order 1738
Multi-Address Minimum Order 1432
Multiple
Select, input type 399
Music download 228
My
Account 15
Orders 1300
Product Reviews, customer 1301
MySQL
Fulltext Search 731-733

N
Name and Address Options 1271
Name, customer 1271
Navigation 357, 705
Breadcrumb trail 708
menu 1150
Top 706
Negotiated quote 1486
Negotiated quote, request 1426
New
Customers 81
order state 1520
Products list 578, 681, 1186, 1194
New Relic Reporting 1909
Queries 1911
New Zealand, PayPal solutions 1683
Newsletter 52, 671
configuration 672
Queue 676
subscribers 93
templates 674
Next page link 713
No
layout updates 375
Node 1150, 1152
Non-sessioned visit 2204
Not Capture 1537
Notifications, Admin 82
Notifications, system 82
Pending Payment, order lifetime 1527
Permanent
    (301) 770, 775, 779, 783
Redirect 763
Permissions
    admin 2130
    Category 376
    custom 2136
    Events 569
Permissions, company 1376
Persistent
    cookie 1448
    shopping cart 1448
PHP script
    database media storage 2143
Physical Gift Card 239
Place order 1510
Placeholders, image 333
Plugins 2128
PNG file type 117, 120
PO 1746
Point of Origin 1757
Poll 446
pop-ups, allow 2232
Popular Search Terms 740
Postal code, optional 102
Previous page link 713
Price
    Advanced 284
    Advanced Pricing, attributes 2117
    display 2024
    drill-down 721
    input type 399
    navigation 715, 721
    Range, bundle product 217
    Special 290
    Tier 295, 423
    View, bundle product 217
Price consistency 1962
Price Display Settings 1980
Price group 288
Price Rule
    Banner 1183
    Catalog 471, 481
    condition, attributes 2047
    coupon 497
    Customer Segment 1404
    promotions 511, 515
    Reward Points 566
    Shopping Cart 483
Price scope, catalog 411
Price Type
    Fixed 273
    Percentage 273
Price, Custom 303
Price, manage 283
Pricing and Structure, shared catalog 417
Print
    credit memo 1570
    shipping labels 1821
Printed Card 1441
Privacy
    policy 151, 155, 1122
Private Access Keys, Marketplace 2250
Private Sales 568, 572
Private Sales, reports 1858
Processing, order status 1520

Product
- attributes, add 390
- Bundle 217
- catalog 55
- Configurable 191-192
- Configurations, add 196
- Content 259
- create 177
- data, export 2079
- Description
  - HTML 2051
- Downloadable 185, 228
- file structure 2061
- Gift Card 239
- Group price 288
- Grouped 204
- image cache 2200
- Image, upload 324
- image, watermarks 334
- image, zoom 332
- images 323
- Images and Videos 262
- Information 1397
  - Design 278
- list 2052
  - by category 690
  - markup tag 690
  - new 690
- promotion 1398
- ratings 54
- relationships 265, 267, 269

return workflow 1571

reviews 54, 464
  - moderate 464-465
- Reviews 261
- Scheduled Changes 183
- Search Engine Optimization 263
- suggestions 48
  - type
  - export 2079
  - Video 328
  - Virtual 211
  - workspace 178

Product Alerts
- configuration 319
- run settings 321

Product Attribute
- Best Practices 384

Product Attributes 383, 2104
  - Advanced Pricing 2117
  - Complex data 2115

Product Configurations 260

Product Field Auto-Generation 181

Product Grig 173

product images 331

Product in Shared Catalog 280

Product in Websites 276

Product List 710

Product page 40

Product Reports 1854

Product Reviews 261

Product Reviews Reports 1846

Product Scope 132
Index

Product Settings 255
  Advanced 256
  Other 257
Product Stock Options 313
Product Types 184
Product variations 196
Product View Page, visible on 2051
Products
  menu 70
promotion_description, variable 619
promotion_name, variable 618
Promotions 469
  banners 1175
  Banners 1183
  Price Rules 511
Provincial Sales Tax 2005
PST 2005
Publish
  page 1139
Punch Out Solutions 26
Purchase Order 1746
Purchase Point 1504

R
  Rating, product 466
  reCAPTCHA 2169
  Receive payment 1510
Recently Compared Products 1186
Recently Viewed Products 463, 1187
Recommendations
  Search 732
  Record selection 73
  Redeem
    reward points 558
Redindex
  after export 2092
Redirect
  misspelled words 739
  type 770, 774, 779, 783
  URL 761
Redirect to Cart 1430
Refresh
  cache 2199
  report data 1842
  statistics 1842

Quick Search 726
  attributes 2047
Quick Tour 23
Quote
  Request (buyer) 1426
  Workflow 1490
Quote Lifetime 1431
Quotes 1486
  Negotiation (seller) 1491
Quotes, enable 60

QR code 497
Quantity
  Discount 295, 423
Query
  length 731
  word count 731
Quick Order 1421
Quick Order, enable 60
Refund 1582
 offline 1574
 online 1574
 reward points 538
 Registered customers
 customer segment 1403
 Reimburse Balance 1590
 Reindex
 events 2210
 full 2211
 partial 2211
 Reindex Required 404
 Related
 Products 265
 Related Product Rules 523
 Configuratorion 528
 Create 524
 Priority 527
 Related Products 265
 Remember Me, shopping cart 1448, 1450
 Reorders, Allow 1435
 Replace
 Existing Data 2094, 2097
 Report
 Coupon Usage 502
 statistics, refresh 1842
 Reports 1838
 Marketing 1844
 menu 70
 New Relic 1909
 Private Sales 1858
 Products 1854
 Reviews 1846
 Sales 1848
 Reports, menu 1840
 Requisition List, enable 60
 Reset, password 1294
 Resource files, optimize 2226
 Resources, role 2139
 Responsive Web Design (RWD) 1233
 Return to Stock 1573
 Returned Merchandise Authorization 1594
 Returns 1594
 Returns Attribute 1601
 Review & Payments, checkout 1473
 Reviews 446
 Product 261
 Reviews and Ratings 464-465
 Reward Points 558
 Configure 559
 customer group 565
 Exchange Rates 563
 Price Rule 566
 Priority 563
 product review 464
 redeem 558
 to currency 564
 Rewrite
 type 770, 774, 779, 783
 Right Column 1179
 RMA 52, 1594
 configuration 1599
 RMA workflow 1595
 robots.txt 753, 755
Index

Role
  custom 2136
  Resources 2137
Role Resources 2139
Roles, company 1376
Root
  category 347-354
Rotation Mode, banner 1182
RSS feed 54 681
Run settings, product alerts 321

S
Sales
  email 106
  information, promotion 1398
  menu 70
  Representative 105
Sales Channels 880, 882
Sales Reports 1848
Sales Representative 1360
Sample
  page 1122
Schedule
  Design changes 1240
Scheduled
  import 2093
  Import/Export 2092
Scheduled Changes 1242,1244
  Product 183
Scheduled Jobs, cron 2215
Scope 127, 2049
  Customer account 136
  settings 127
Scope, product 132
Screen Name 16
Scripts and Style Sheets 1208
Search
  Admin 85
  configure 731, 733
  default 731, 733
  global 85
  Pages 1128
  quick 726
  Recommendations
    enable 732
  results 729
  tools, storefront 725
  Type, MySQL 731
Search engine 731
  friendly URLs 169
  optimization 46
Search Engine Optimization 264
  Categories 362
  Product 263
Search Results page 38
Search Terms 93, 739
  add 742
Security 143, 2148
  Action Plan 2159
  Admin 2161
  Best Practices 2153
  Encryption Key 2191
  reCAPTCHA 2169
  systems 143
  Two-Factor Authentication 2175
<table>
<thead>
<tr>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price Lifetime 1431</td>
</tr>
<tr>
<td>price rule 483.497.511.515.518</td>
</tr>
<tr>
<td>promotion 1398</td>
</tr>
<tr>
<td>Sidebar 1429</td>
</tr>
<tr>
<td>thumbnails 1436</td>
</tr>
<tr>
<td>Shopping Cart Thumbnails 202</td>
</tr>
<tr>
<td>Shopping Cart, manage 1456</td>
</tr>
<tr>
<td>Sidebar, block reference 1173</td>
</tr>
<tr>
<td>Sign out, Admin 68</td>
</tr>
<tr>
<td>Signifyd Fraud Protection 1752</td>
</tr>
<tr>
<td>Sitemap 46.753</td>
</tr>
<tr>
<td>SKU</td>
</tr>
<tr>
<td>in price rules 481</td>
</tr>
<tr>
<td>multiple 481</td>
</tr>
<tr>
<td>use of 192</td>
</tr>
<tr>
<td>Slider</td>
</tr>
<tr>
<td>jQuery 1167</td>
</tr>
<tr>
<td>Small Image 323.327</td>
</tr>
<tr>
<td>Social 701</td>
</tr>
<tr>
<td>Software download 228</td>
</tr>
<tr>
<td>Solutions Partners, Magento 55</td>
</tr>
<tr>
<td>Sort 73</td>
</tr>
<tr>
<td>attributes 2047</td>
</tr>
<tr>
<td>Conditions 368</td>
</tr>
<tr>
<td>controls 86</td>
</tr>
<tr>
<td>product list 361</td>
</tr>
<tr>
<td>Sorting</td>
</tr>
<tr>
<td>Automatic 368</td>
</tr>
<tr>
<td>Spain, PayPal solutions 1683</td>
</tr>
<tr>
<td>Spam 672</td>
</tr>
<tr>
<td>Special Price 290</td>
</tr>
<tr>
<td>Special Products, RSS feed 683</td>
</tr>
<tr>
<td>SSL 1942</td>
</tr>
<tr>
<td>Startup Page</td>
</tr>
<tr>
<td>Admin 80</td>
</tr>
<tr>
<td>State is required for 100</td>
</tr>
<tr>
<td>States Options 100</td>
</tr>
<tr>
<td>Static File Signatures 2225</td>
</tr>
<tr>
<td>Static URL 169</td>
</tr>
<tr>
<td>Status</td>
</tr>
<tr>
<td>change 90</td>
</tr>
<tr>
<td>Status, Company Account 1361</td>
</tr>
<tr>
<td>Stock Availability 311</td>
</tr>
<tr>
<td>catalog page 317</td>
</tr>
<tr>
<td>product page 315</td>
</tr>
<tr>
<td>scenarios 315</td>
</tr>
<tr>
<td>Storage</td>
</tr>
<tr>
<td>configuration, media 2144</td>
</tr>
<tr>
<td>Store</td>
</tr>
<tr>
<td>add 1936</td>
</tr>
<tr>
<td>credit, configuration 1585</td>
</tr>
<tr>
<td>URL 67, 1942</td>
</tr>
<tr>
<td>[STORE] 127</td>
</tr>
<tr>
<td>Store Demo Notice 124</td>
</tr>
<tr>
<td>Store details 96</td>
</tr>
<tr>
<td>Store Hierarchy 1926, 1936</td>
</tr>
<tr>
<td>Store Information 97</td>
</tr>
<tr>
<td>Store URL, markup tag 689</td>
</tr>
<tr>
<td>Store View</td>
</tr>
<tr>
<td>add 1927</td>
</tr>
<tr>
<td>edit 1929</td>
</tr>
<tr>
<td>Storefront</td>
</tr>
<tr>
<td>Branding 114</td>
</tr>
<tr>
<td>CAPTCHA 2164</td>
</tr>
<tr>
<td>reCAPTCHA 2169</td>
</tr>
</tbody>
</table>
Two-Factor Authentication 2175
Stores
    menu 70
Stores, menu 1922
Stores, multiple 126, 1926
Style Sheets 1208
Subcategory 347, 357
Subdomain, CDN 2145
Success page 797, 1474
Support tools 2252
Support Tools
    Data Collector 2253
    System Reports 2255
Surveys 446
Suspected Fraud, order status 1520
Swatches 337
Swatches, create 339
Switch Accounts 21
Synchronization 2143
Syndicated content 681
Synonyms 742
    search terms 739
Syntax
    layout update 1225
System
    attribute 397
    backup 2214
    menu 70
    passwords 143
System Reports 2255
System Upgrade 2247
System, menu 2056
T
Table Rate, shipping 1767
Tag
    cloud 740
Tag Manager, Google 790
Tags
    product
        RSS feed 681
Target Path, redirect 770, 774, 779, 783
Targeted promotion 1397
Tax 55, 1952, 1964
    Calculation Settings 2016
class
        customer group 1393
        VAT 1995
Class
    Gift options 1446
    Default Tax Destination 1972
    Digital Goods 1973
    Discount Settings 2016-2017
    Display Settings, configure 1960
    General Settings 1957
    rates
        VAT 1995
    Rounding 1999
    rules 1964
        VAT 1995
    Warning Messages 2016
Tax as line item 2000
Tax Calculation Methods 1999
Tax Class 1968
    Configuration 1969
    Customer Group 1968
Index

Product 1968
Tax Class, VAT 2010
Tax Guidelines, international 2001
Tax Rate
  Point of Origin 1757
Tax Rates
  Import 1985
Tax Zones and Rates 1983
Tax, Quick Reference 1999
Teams, assign users 1373
Teams, company 1363
Template
  email reminder 624
  layout update, widget 1188
  tag 690
  variables 685
Template Path Hints 2230
Templates, transactional email 610
Temporary (302) redirect 770, 775, 779, 783
Terms and Conditions 1476, 1478
Text
  Area, input type 399
  editor 1145
  Field, input type 398
Theme 47, 1201-1202
  change 1235
Theme, default 1233
Themes 2128
Third-party
  applications 55
Thumbnail 327, 1436
  Image 331
Tier Price 295, 423
Export 2074, 2089
Import 2073, 2089
Time zone 99
Tools, system 2196
Top Level Category, RSS feed 683
Top navigation 706
Training 6
Transactional emails 447
templates 610
Transactions 1604
Translate
  Field Labels 1933
  Page 1935
  Product Fields 1933
Translate Store 1931
TVQ 2005
Twitter 7
Two-Factor Authentication 2175

U

UI Text 2232
Under construction 124
United Kingdom, PayPal solutions 1684
United States
  Tax Configuration 2003
United States, PayPal solutions 1684
Universal Analytics, Google 786, 799
Unlock
  Admin account 2135
Unselect
  All 90
  Visible 90
Unselect All 92
Unselect Visible 92
Up-sell products 267.460
    rules 523
Up-sells 265
Update Attributes 91
Update, scheduling 1244
UPS 1819
    shipping labels 1825
URL 2145
    category path 170
    custom 46
    dynamic 169
    Key 169.264
        node 1152
        page 1135
    options 169
    redirect 761
    rewrite 358
    static 169
    suffix 264
URL, custom Admin 1947
Use
    Default checkbox 129.1932
    for Promo Rule Conditions 2051
    in Quick Search 730
Use Aggregated Data 80
Use in Product Listing 535
Use Secure URLs (SSL) 1942
User
    guides 4
User guides 4
User Role, Admin 2134
USPS 1819
    shipping labels 1825
V
Value Added Tax 1952.1964.1988
Variable, markup tag 689
Variables 685-687.1148
    email 601
    email reminder 619
VAT 1988
    Configure 1989
    VAT ID Validation 1992
    VAT ID Validation, configure 1994
    VAT Number 98
    VAT Tax Class 2010
    VAT Validation
        configure 1995
    Video, product 328
    VIP 568
Virtual
    Gift Card 239
    Product 184.211
Virtual Product 211
Visit
    non-sessioned 2204
    sessioned 2204
Visitors
    customer segment 1403
Visual Merchandiser 532
    Category Rules 535
    Configuration 539
Index

W

Watermarks, product image 334
Web API Security 2126
Web server
    synchronization 2143
Web Setup
    System Configuration 2250
Web Setup Wizard 2236
Webinars 4.7
[WEBSITE] 127
Website Restrictions
    Events 569, 572
Website, add 1940
Websites
    multiple 126, 1926
    product 276
WEEE tax 1974
Weight
    Bundle Product 227
Weight, dimensional 1774
Welcome 3
    message 121, 1209
    message, block 1222
White list 676
Whitelist, Developer 2232
Widget 691, 1147, 1188
    add to page 1147
    Banner 1180
    code 691
    email 601
    event 571
    Gift Registry Search 552
    New Products 578, 1194
    Wish List Search 458
Widgets 1185
Wiki 4
Wish List
    Search 458
    Update 453
Wishlist 446, 456
    configuration 451
    in RSS feed 683
Work week, store 99
Workflow
    order 1520
    workspace
        Admin 72
Workspace
    Grid 86
Workspace; Grid columns 88
Worldpay 1733
WYSIWYG Editor
    enable 398

X

XML 1218, 1229

Y

Yes/No, input type 399
YouTube 7

Z

Zero Subtotal Checkout 1748
Zones, tax 1983