Magento

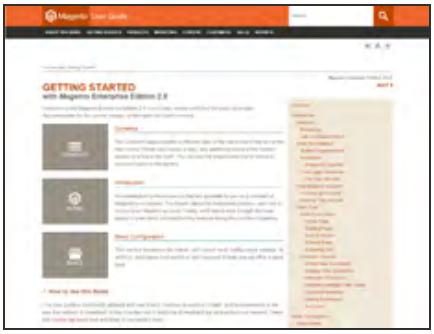
Magento Enterprise Edition User Guide

Version 2.0

GETTING STARTED

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 configuration reference that is linked throughout the material. After learning the basics, you can use this guide as a springboard into more advanced topics and resources.



Online User Guide

The online guide is the primary user documentation for the current release of Magento Enterprise Edition 2.0. 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 in the appendix of this guide.

PDF User Guide

You’ll find the same great information in both the online (HTML) and offline (PDF) user guides, so you can use the format you prefer. 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. The Documentation Archive in the appendix of this guide will eventually have PDF download links for every major version of the product.

Notes

GETTING STARTED

Introduction

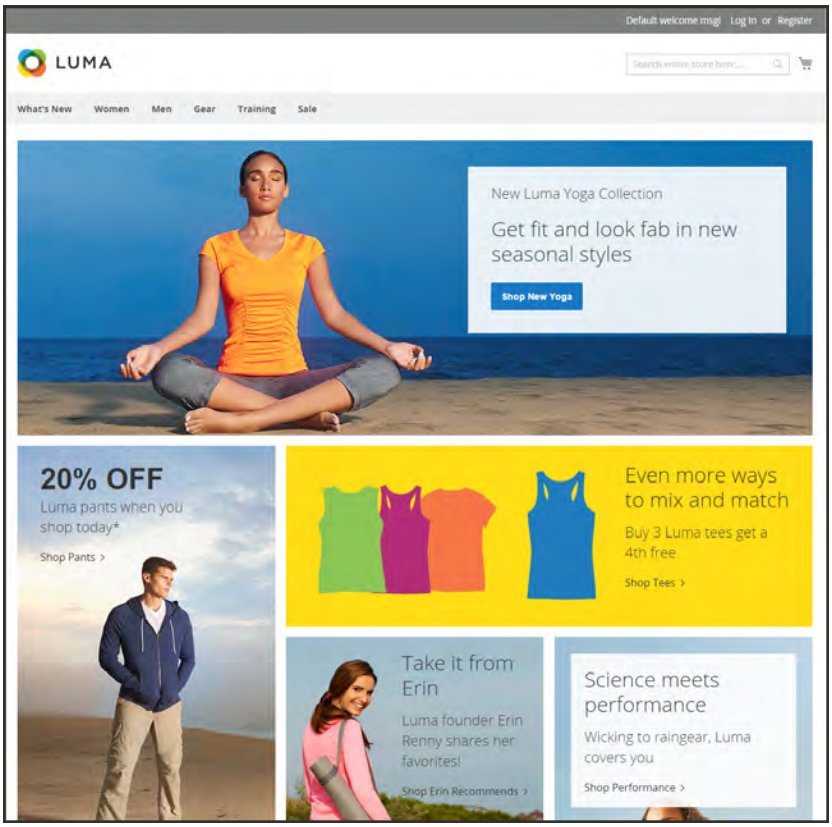
This section of the guide provides an overview of the resources that are available to you as a member of the Magento community. You'll learn about the current release, and how to log into your Magento account. Finally, you'll take a guided tour of Magento from two different perspectives, with links you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

Contents

CHAPTER 1:

Welcome

Welcome to the next generation of the world's leading digital commerce platform! Built on open-source technology, Magento Enterprise Edition 2.0 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 2.0 offers you a stable, secure, and customizable solution for your growing business.



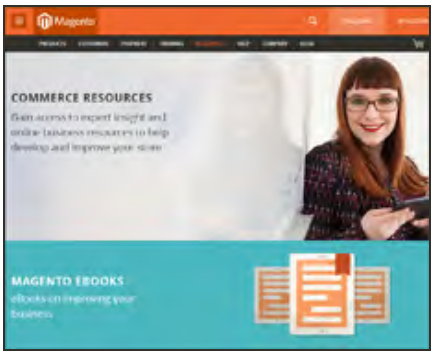
Home Page

Resources

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

Product Documentation

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



Commerce Resources

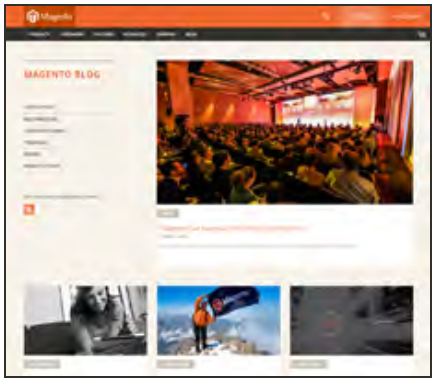
Gain access to expert insight and online business resources to help develop and improve your store. Ebooks, Magento whitepapers, and webinars.

Security Center

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

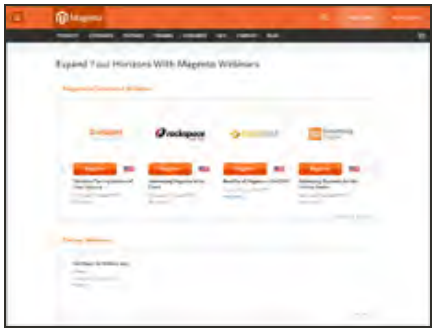
Forums

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



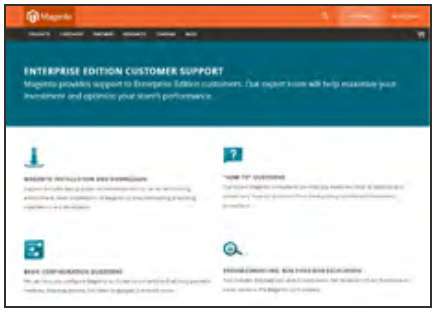
Blog

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



Webinars

Expand your horizons! Register to attend an upcoming Magento webinar, or catch up on previous archived sessions.



Enterprise Edition Support

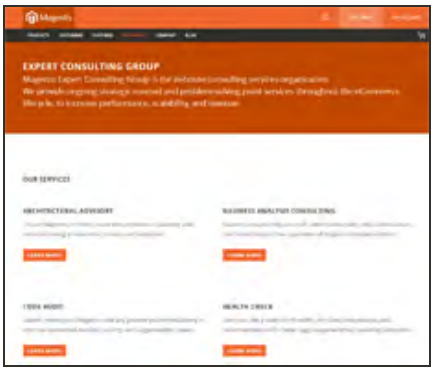
Our expert team is here to help with installation and downloads, answer your configuration and “how to” questions, and help troubleshoot and resolve problems related to the Magento core product.

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

Magento's Expert Consulting Group (ECG) is our in-house consulting services organization that provides ongoing strategic counsel and problem-solving services throughout the eCommerce lifecycle to help you increase performance, scalability, and revenue.

Join the Conversation!

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

Magento Forums

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

Facebook

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

Twitter

Follow us on Twitter!

LinkedIn

Join a Magento group on LinkedIn.

Google+

Add us to your circle on Google+.

YouTube

Learn while you watch videos
on our YouTube channel!

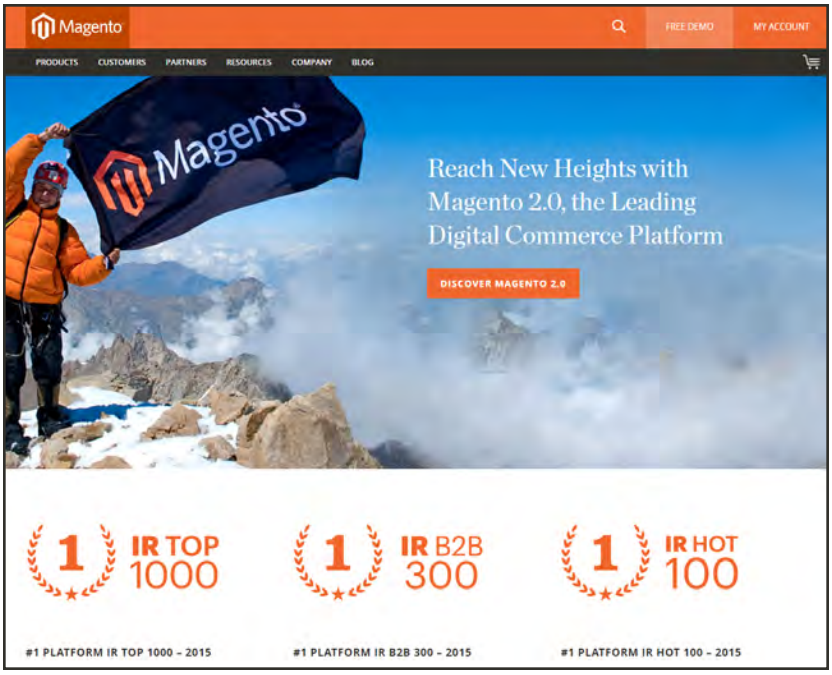
Meetup

Find a Magento Meetup near you!

CHAPTER 2:

About this Release

Magento Enterprise Edition 2.0.2 resolves issues that some users encountered while upgrading from Magento 2.0.0 to Magento 2.0.1 using a compressed archive file. To learn more, see the Release Notes in the Appendix of this guide.



World's Leading Digital Commerce Platform

System Requirements

For more information, see System Requirements in the Magento 2.0 developer documentation.

SYSTEM REQUIREMENTS		
ENVIRONMENT		
Operating System	Linux x86-64	
Composer	Composer is required for developers who want to contribute to code base,or develop extensions.	
Web Server	Apache 2.2 or 2.4	The `apache mod_rewrite` module must be enabled. To learn more, see: Apache.
	Nginx 1.8.x	(or latest stable version)
PHP	PHP 7.0.2	(Magento 2.0.1 and later only)
	PHP 5.6.x	(or latest stable version)
	PHP 5.5.x	(or latest stable version)

	Required extensions:
	`bc-math` (Enterprise Edition only)
	`curl`
	`gd`, ImageMagick 6.3.7 (or later) or both
	`intl`
	`mbstring`
	`mcrypt`
	`mhash`
	`openssl`
	`PDO_MySQL`
	`SimpleXML`
	`soap`
	`xml`
	`xsl`
	`zip`
	Optional, but recommended	

SYSTEM REQUIREMENTS		
	`opcache`	This extension is bundled in many PHP distributions. To verify, see: CentOS or Ubuntu.
	`php_xdebug2.2.0` or later	Recommended for development environments only.
	Additional configuration: `safe_mode off` `memory_limit` minimum 512 MB	
Database	MySQL 5.6.x (Oracle or Percona) Magento Enterprise Edition 2.0 can use three master databases to provide scalability for the different functional areas of checkout, orders, and product data.	
SSL	A valid security certificate is required for HTTPS. Self-signed certificates are not supported.	
Mail Server	Mail Transfer Agent (MTA) or SMTP server	
SUPPORTED APPLICATIONS		
Reverse Proxy / Web Accelerator	Varnish 3.5 Varnish 4.x (or latest stable version.)	
Cache Storage	Redis 3.x Memcache 1.4.x	
Session Storage	memcached latest stable version for session storage with either memcache or memcached PHP extensions (latest stable version)	
Search	Apache Solr (Enterprise Edition only)	
Messaging	RabbitMQ (Enterprise Edition only)	

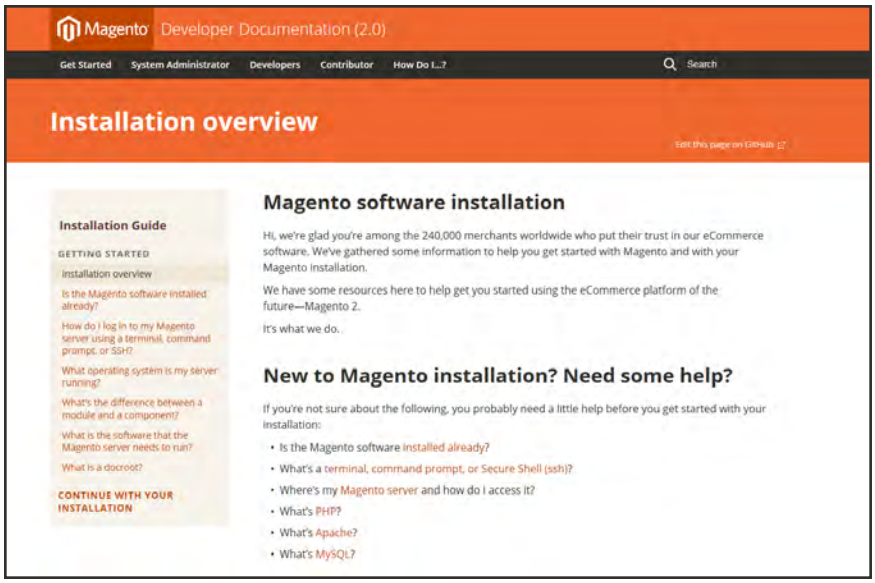
SUPPORTED BROWSERS

BROWSER	VERSION	OS
Storefront/Admin		
Firefox	Latest, latest -1*	Any
Chrome	Latest, latest -1	Any
Safari	Latest, latest -1	Mac OS
Microsoft Edge	Version 11 or later	Windows
Storefront Only		
Internet Explorer	Version 9 or later	Windows
Desktop Storefront		
Safari Mobile	iPad 2 iPad Mini iPad with Retina Display	OS 7 or later
Mobile Storefront		
Safari Mobile	iPhone 4 or later	IOS 7 or later
Chrome for Mobile	Latest, latest -1	Android 4 or later

* The version before the most current.

Installation

To install Magento Enterprise 2.0 on your server, see the Installation Guide in our technical documentation. For an overview of the second part of the installation process, see Web Setup Wizard in the System Operations section of this guide.



Installation 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 definition of each 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, the cleaning of database logs, 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

It's a good idea to 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 and 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

Magento Version: _____

Encryption Key: _____

Database Name: _____

Database User Name: _____

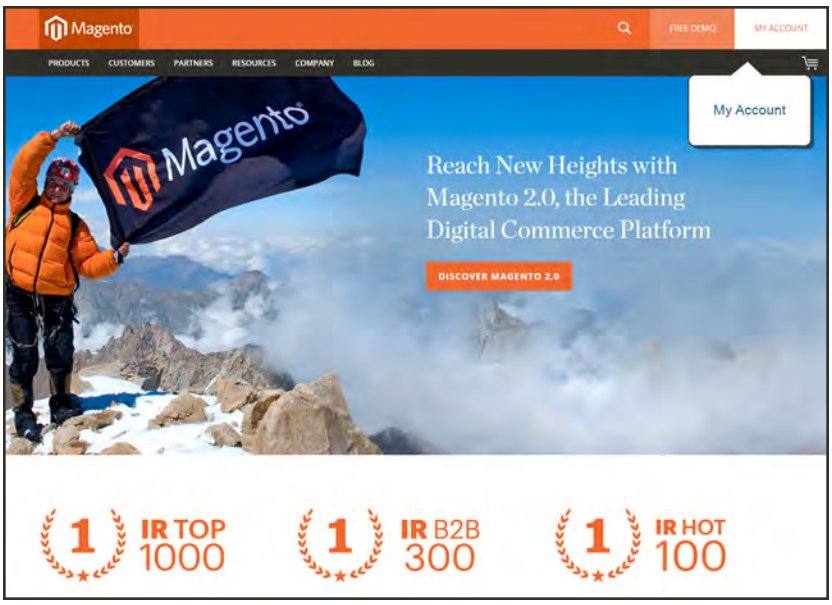
Database Password: _____

Notes

CHAPTER 3:

Your Magento Account

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



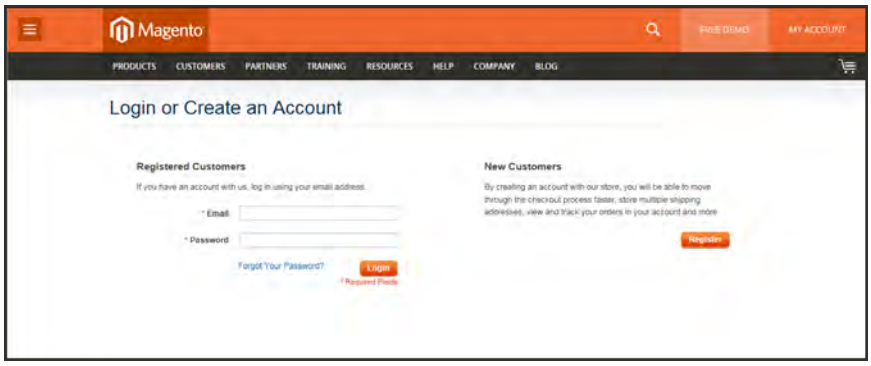
Your Magento Account

Creating a Magento Account

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

To create a Magento account:

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



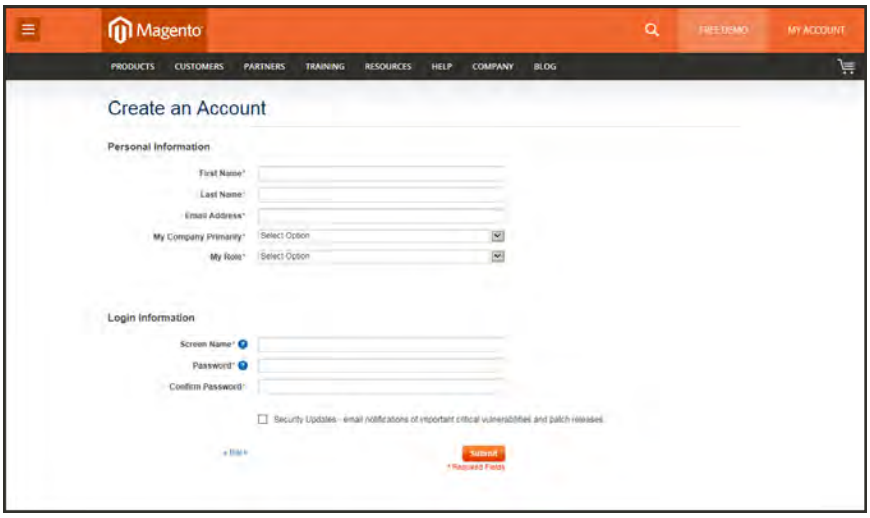
Log In to Your Account

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



Create an Account

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:

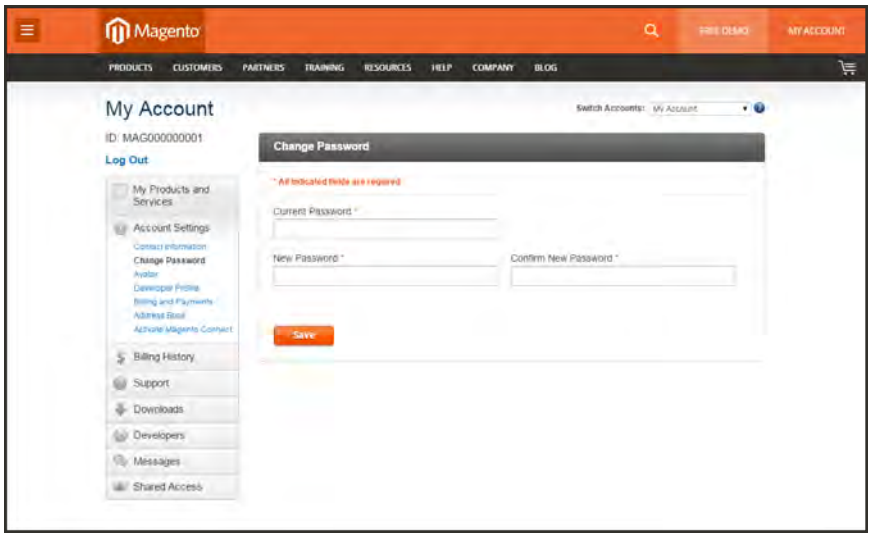
1. If you forget your password, click **Forgot Your Password?**
2. Enter the **Email Address** that is associated with your account, and tap **Submit**.

   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.



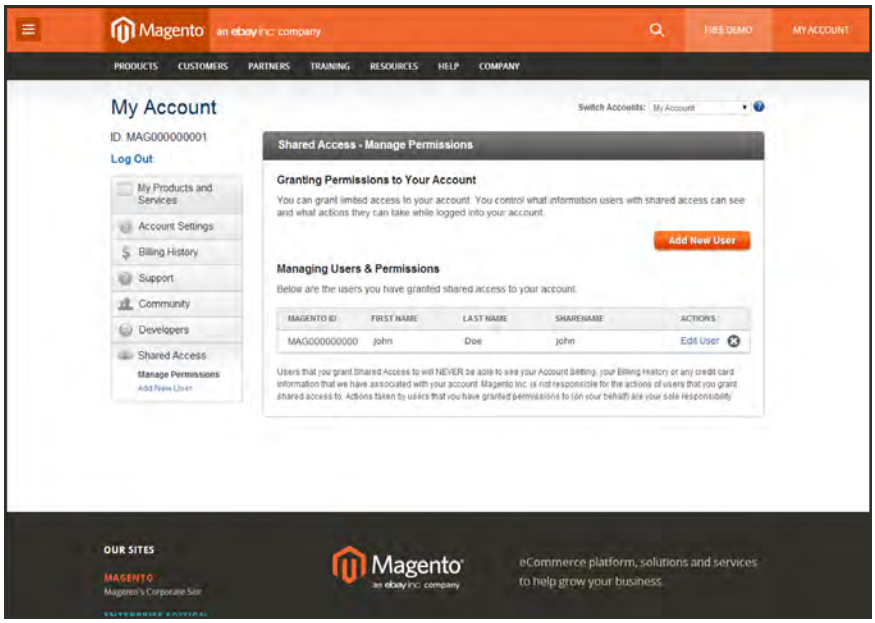
Change Password

5. When complete, tap **Submit**.

Sharing Your Account

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

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



Shared Access

To set up a shared account:

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

a. Enter a **Sharename** to identify your shared account. Because the Sharename becomes an option in the Switch Accounts list, it should be something that the other person will recognize as your account.

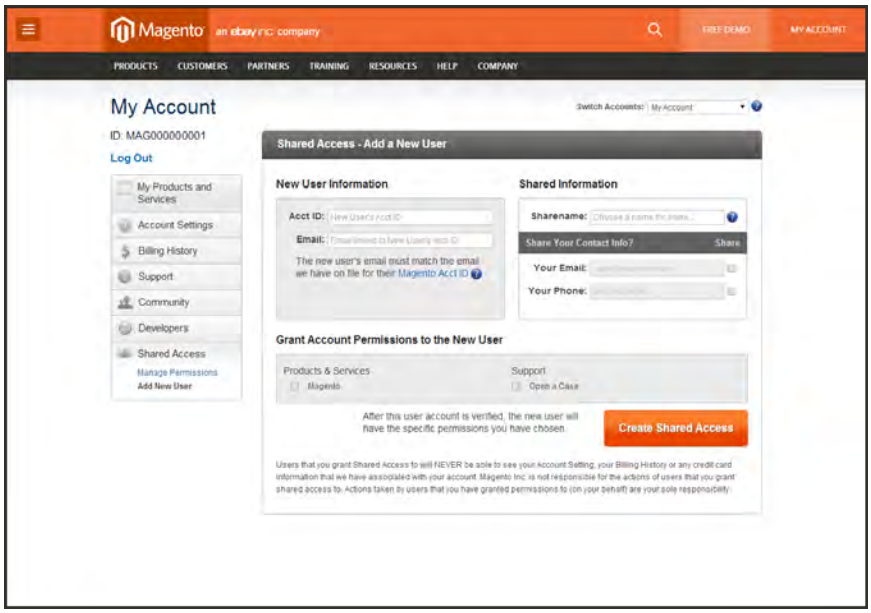
b. To share your personal contact information, mark the checkbox of each item that you want to make available to the other person:

- Your Email
- Your Phone

5. In the Grant Account Permissions section, mark the checkbox of each item 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 Users & Permissions section of the Shared Access page. Magento also sends an email invitation with instructions for accessing the shared account to the new user.



Add a New User

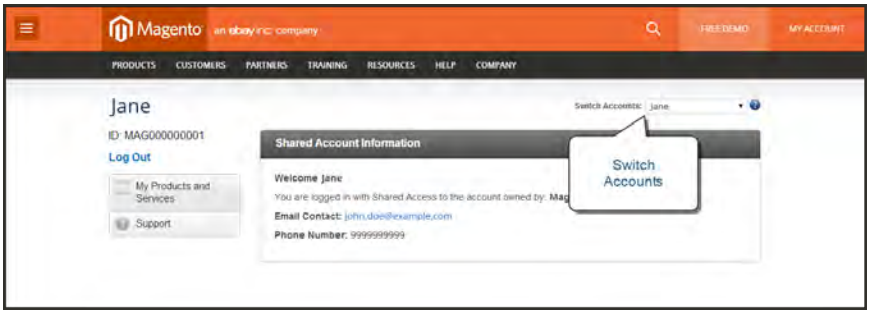
To access a shared account:

1. When you receive the invitation to a shared account, log in to your own Magento account.

   Your account dashboard has a new Switch Accounts control in the upper-right corner, with options for “My Account” and the name of the shared account.

2. To gain access to the shared account, set **Switch Accounts** to the name of the shared account.

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



Switch Accounts

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

Notes

CHAPTER 4:

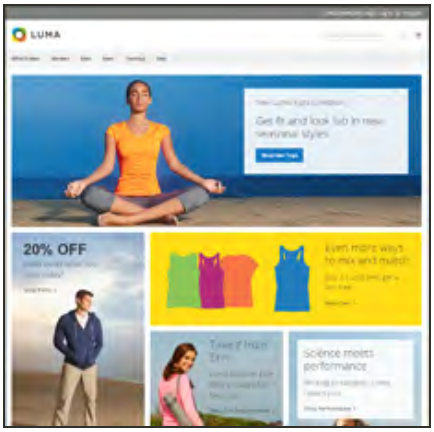
Quick Tour

In this quick tour, we'll take a look at each page that customers usually visit while shopping in your store. The path that customers follow that leads to a sale is sometimes called the "path to purchase." Then, we'll take a look at the major landmarks along the journey, and how Magento 2 can be used to attract and engage customers, increase the average order, and to build loyalty and advocacy.

Customer Journey

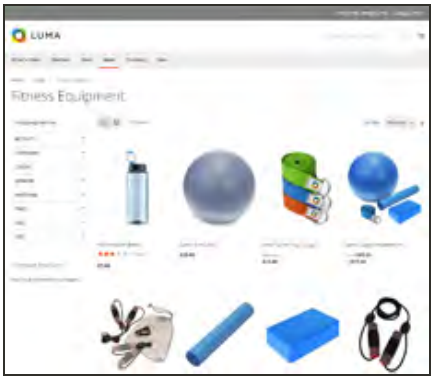
The Path to Purchase

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 each page 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.



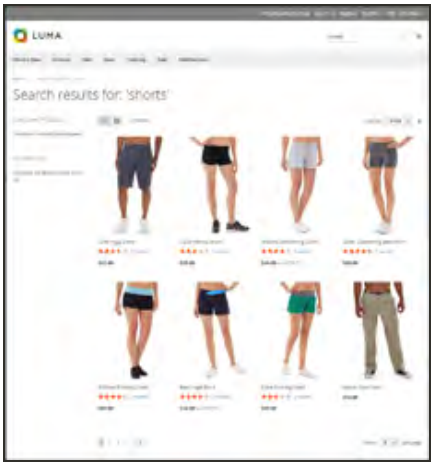
Home Page

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.



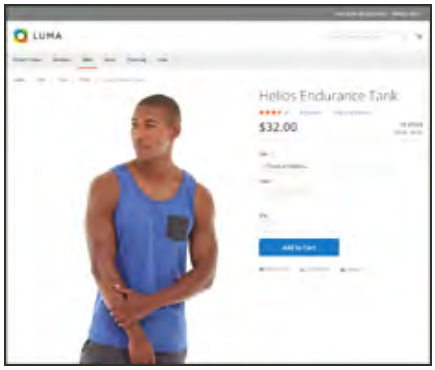
Catalog Page

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.



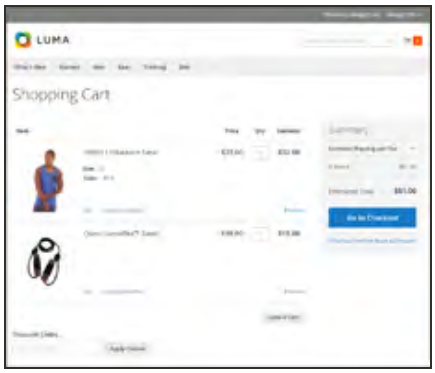
Search Results

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

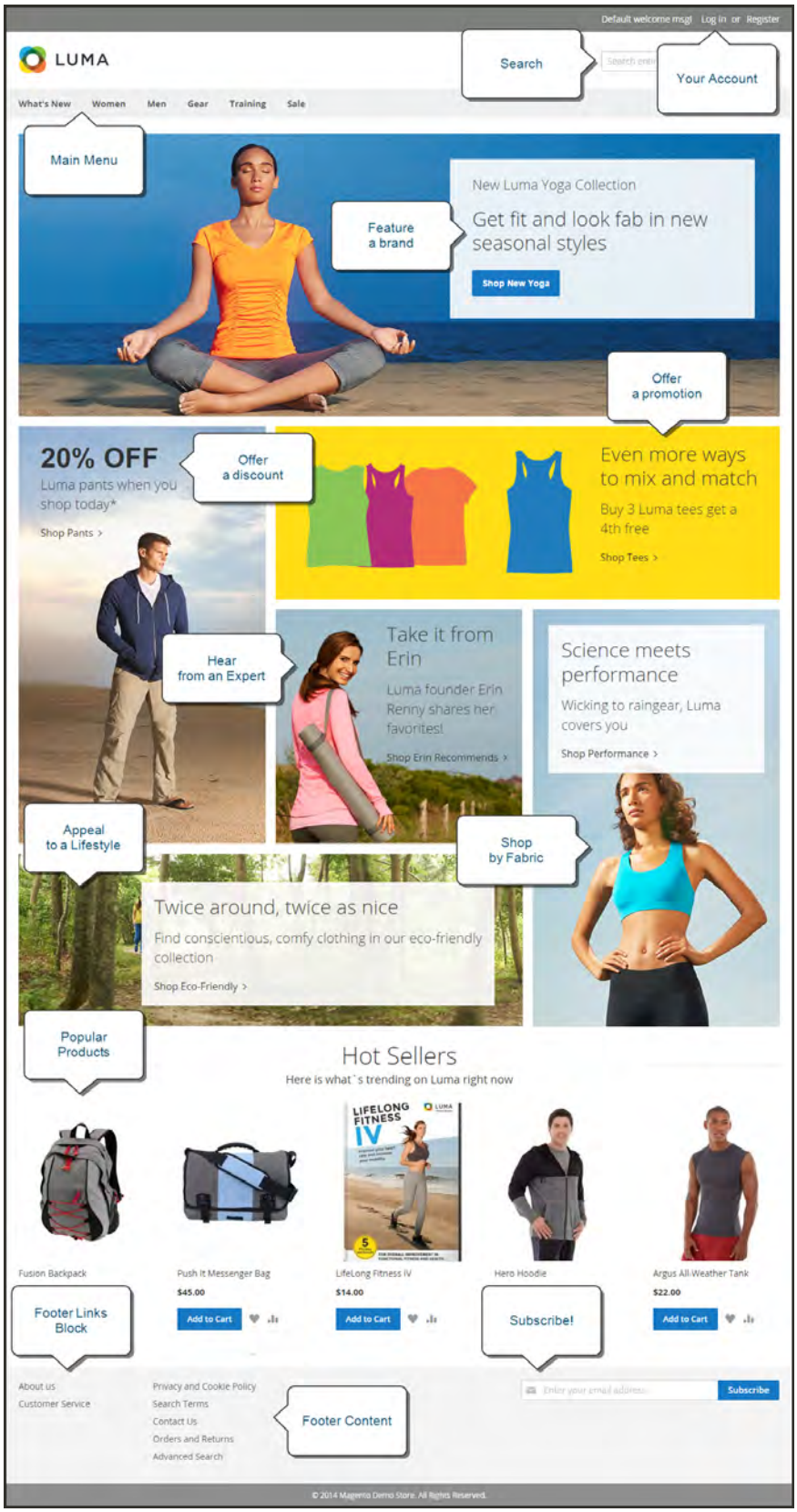
The shopping cart lists each item by price and quantity selected, and calculates the subtotal. Shoppers can apply discount coupons, and generate an estimate of shipping and tax charges.

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!


Default welcome msg! Log In or Register
LUMA
Search
Your Account
What's New Women Men Gear Training Sale
Main Menu
New Luma Yoga Collection
Get fit and look fab in new seasonal styles
Shop New Yoga
Feature a brand
Offer a promotion
20% OFF
Luma pants when you shop today*
Shop Pants >
Offer a discount
Even more ways to mix and match
Buy 3 Luma tees get a 4th free
Shop Tees >
Take it from Erin
Luma founder Erin Renny shares her favorites!
Shop Erin Recommends >
Hear from an Expert
Science meets performance
Wicking to raingear, Luma covers you
Shop Performance >
Appeal to a Lifestyle
Shop by Fabric
Twice around, twice as nice
Find conscientious, comfy clothing in our eco-friendly collection
Shop Eco-Friendly >
Popular Products
Hot Sellers
Here is what`s trending on Luma right now
Fusion Backpack
Push It Messenger Bag
$45.00
Add to Cart
LifeLong Fitness IV
$14.00
Add to Cart
Hero Hoodie
Argus All-Weather Tank
$22.00
Add to Cart
Footer Links Block
Subscribe!
About us
Customer Service
Privacy and Cookie Policy
Search Terms
Contact Us
Orders and Returns
Advanced Search
Footer Content
Subscribe
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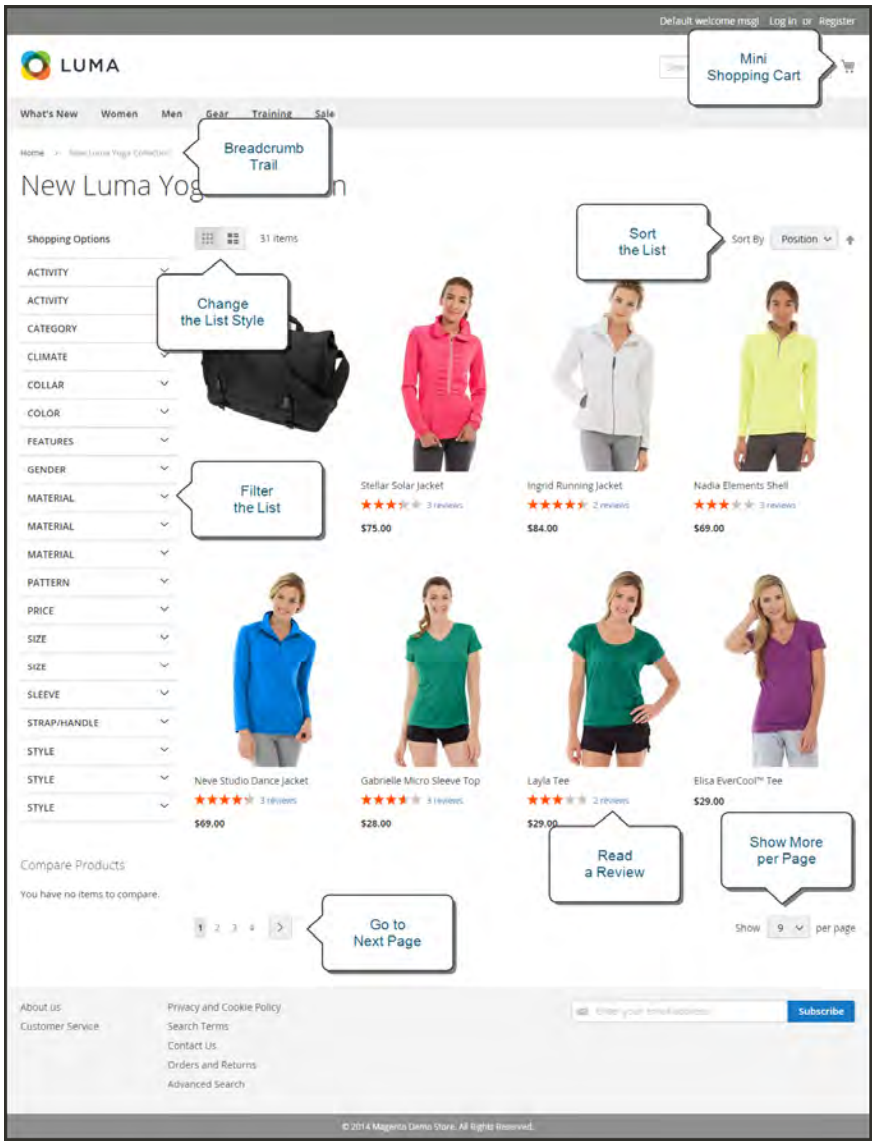
Home Page

Catalog Page

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

Callouts

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



Catalog Page

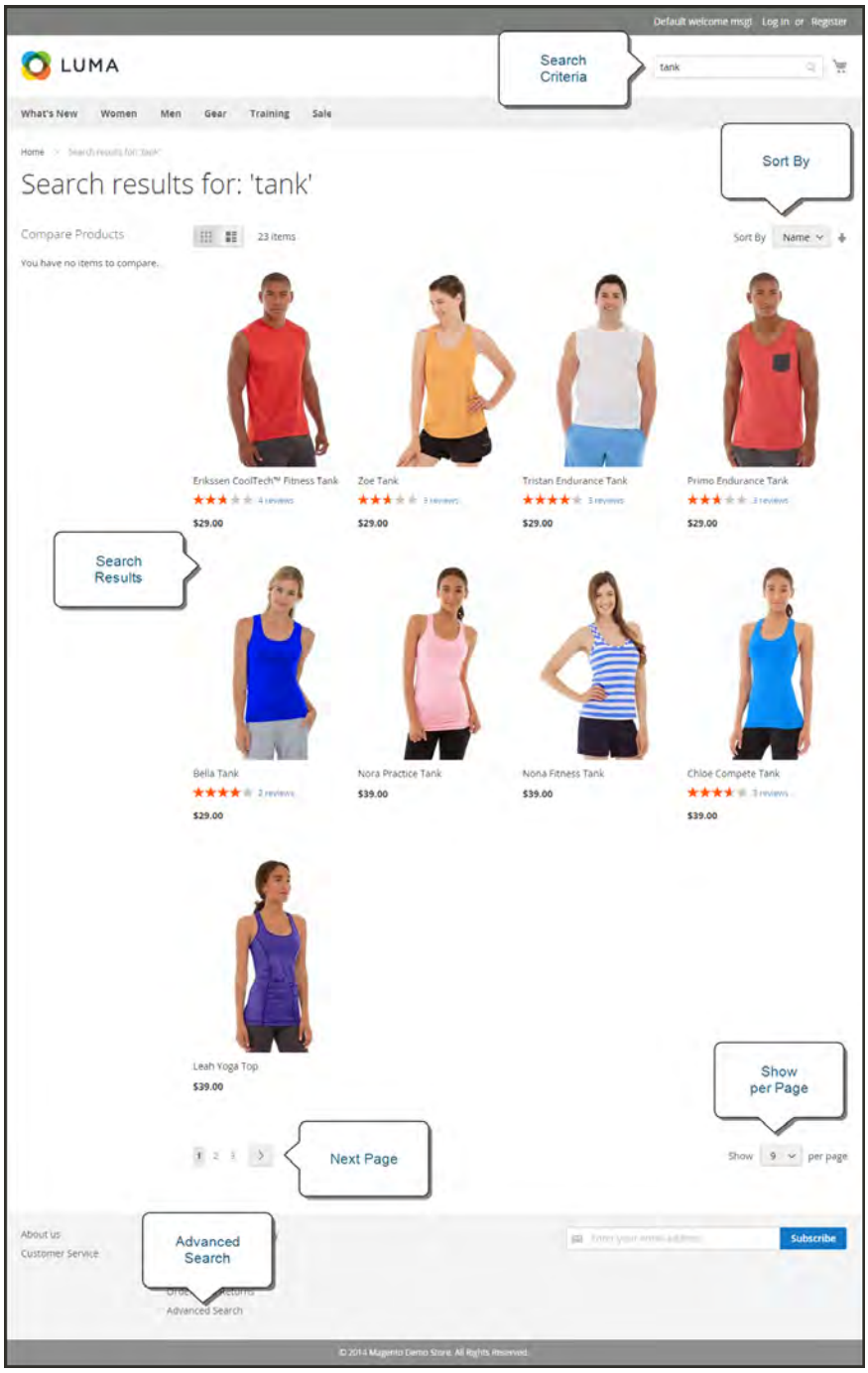
Search Results

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

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

Callouts

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



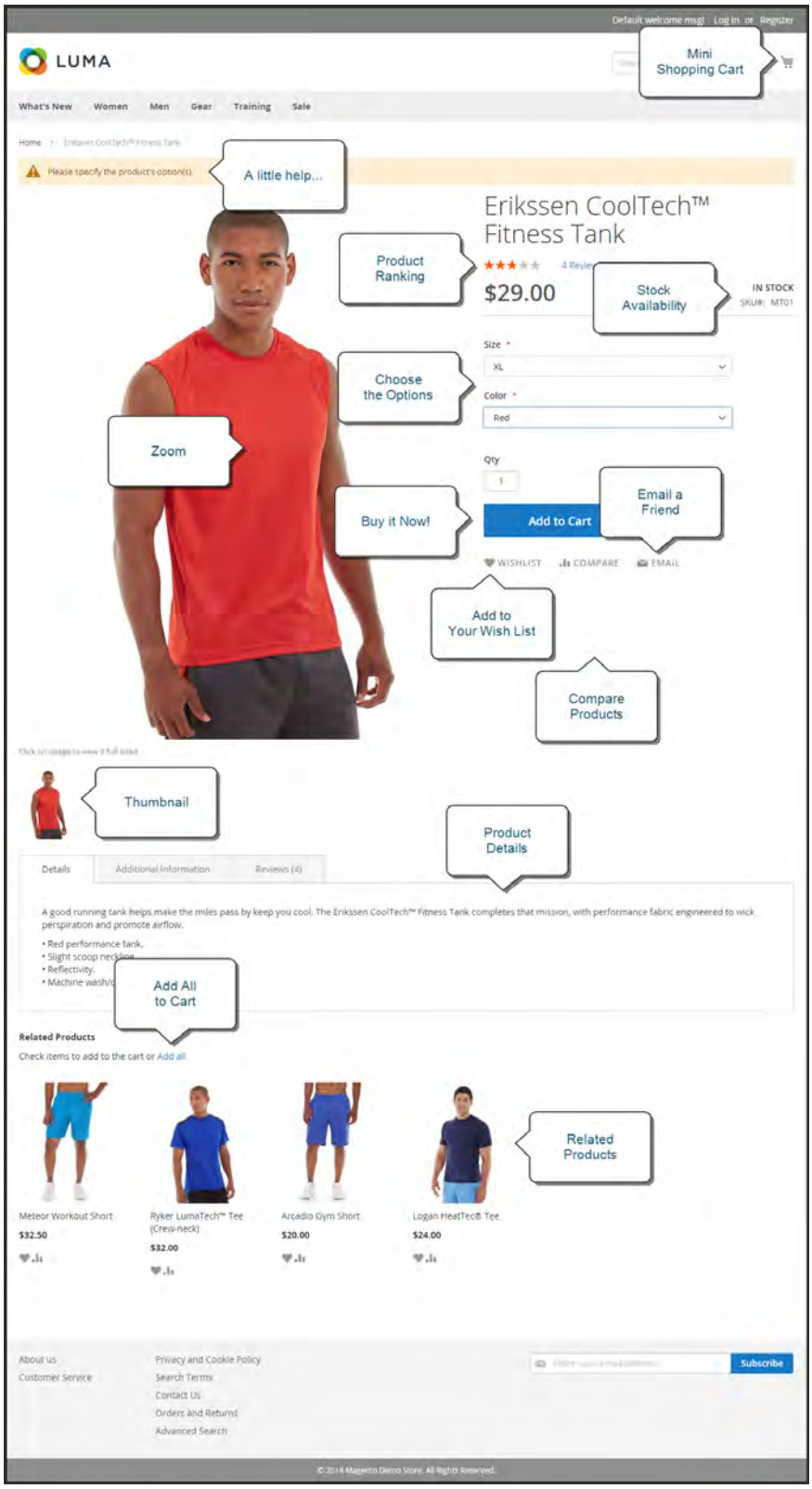
Search Results

Product Page

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

Callouts

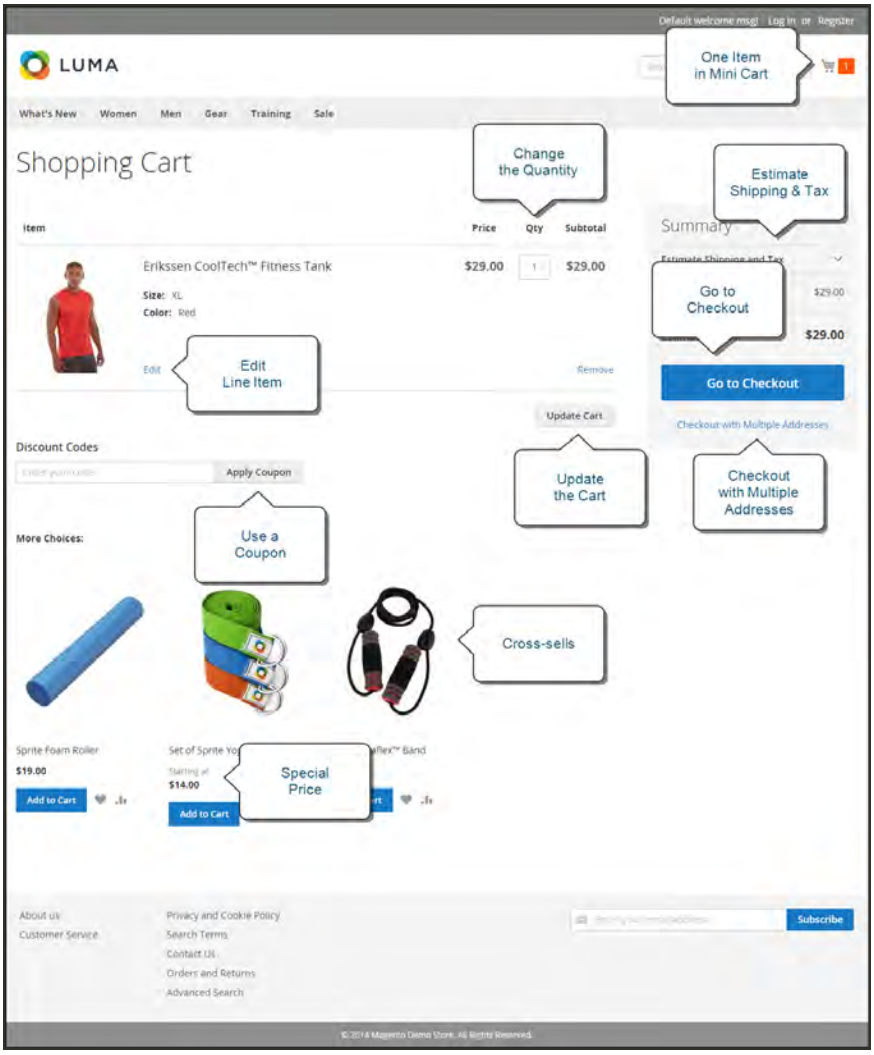
- Mini Shopping Cart
- A little help…
- Product Rating
- Stock Availability
- Choose the Options
- Zoom
- Buy it Now!
- Email a Friend
- Add to Your Wish List
- Compare Products
- Thumbnail
- Product Details
- Add All to Cart
- Related Products



Product Page

Shopping Cart

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



Shopping Cart Page

Customer Journey

Attract New Customers

Magento Enterprise Edition 2.0 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. This will strengthen your relationship with your customers, who in return, will speak positively of your business to friends and family.

Attract New Customers

Magento Enterprise Edition 2.0 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, for detailed statistics on traffic and sales.

Engage Your Customers

Magento Enterprise Edition 2.0 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. It's so intuitive that someone 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 eCommerce now and into the future.

Shopping Tools

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

Sophisticated Search

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

Moment of Purchase

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

Order Processing

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

Shipping Labels

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

Multiple Shipping Options

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

Multiple Payment Options

Magento Enterprise Edition 2.0 supports the payment methods and currencies needed for global commerce. You can choose the ones you want to offer, and at checkout, your customers can choose the ones they prefer.

PayPal Merchant Solutions

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

Shopping Assitance

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

Security

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

Increase Average Order Value

Magento Enterprise Edition 2.0 provides a range of tools to help you tailor the shopping experience, and encourage your customers to put more items in their shopping carts and spend more money.

Targeted Promotions

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

Coupons

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

Product Suggestions

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

Email Reminders

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

User Permissions & Roles

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

Full-Page Cache

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

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

Sales Order Archive

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

Index Management

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

Customer Retention

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

RMA

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

Store Credit

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

Reward Points

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

Custom Coupons

Use customer segmentation to create coupons for use on—or off—your site. Create coupons for social media or email campaigns. You can also create unique coupon codes, and design them the way you like.

Newsletters

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

Target Shopping History

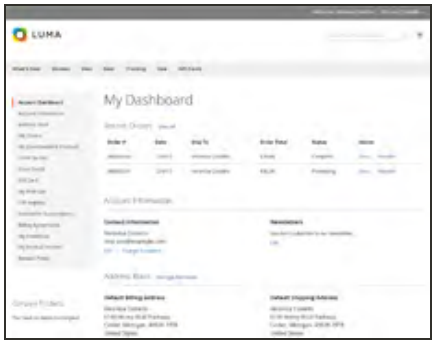
Encourage customers to make return purchases with targeted promotions based on their shopping history. With the Magento platform, you can easily build segments based on your customer base.

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 list, and newsletter subscriptions. Use product ratings and reviews to give new customers objective product opinions and promote a sense of community. These features turn customer satisfaction into one of the most powerful and cost-efficient marketing tools at your disposal.

Dashboard Snapshots

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



Customer Accounts

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

Advocacy Tools

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

Reviews & Ratings

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

Success!

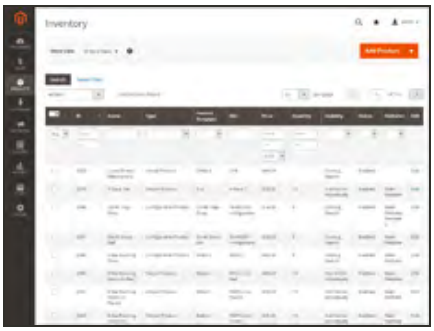
Opening your Magento store for business requires the following areas of consideration. While there are virtually any number of customizations you can make to the storefront and Admin, you can use each link in this is list as a place to start.

Implementation

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

Design

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



Product Catalog

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

Payment Methods

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

Shipping Methods

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

Taxes

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

Thanks for your order!

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

Notes

Basic Configuration

This section of the guide introduces the basics of your store configuration, along with some industry-standard best practices. You'll learn where to find the most commonly used configuration settings, how to brand your storefront, and manage multiple stores.

Contents

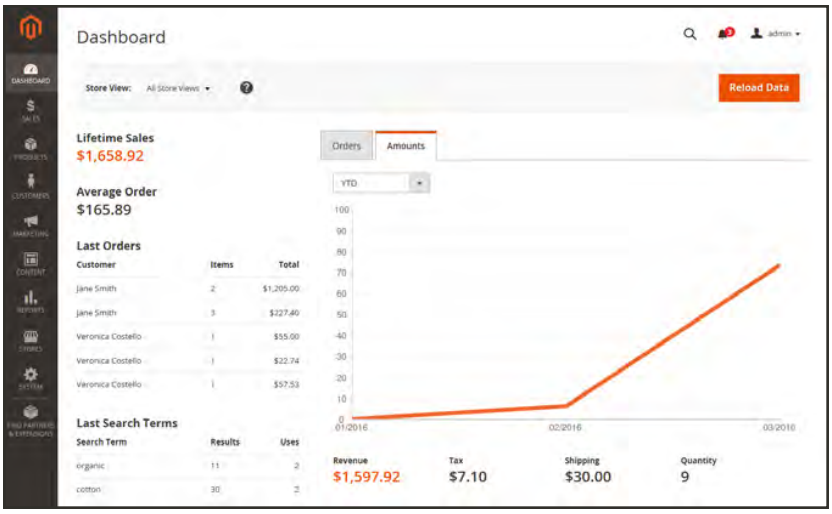
CHAPTER 5:

Store Admin

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

- Admin Sign In
- Your Admin Account
- Admin Sidebar
- Admin Workspace

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



Admin Dashboard

Admin Sign In

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

Admin Sign In

To sign in to the Admin:

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

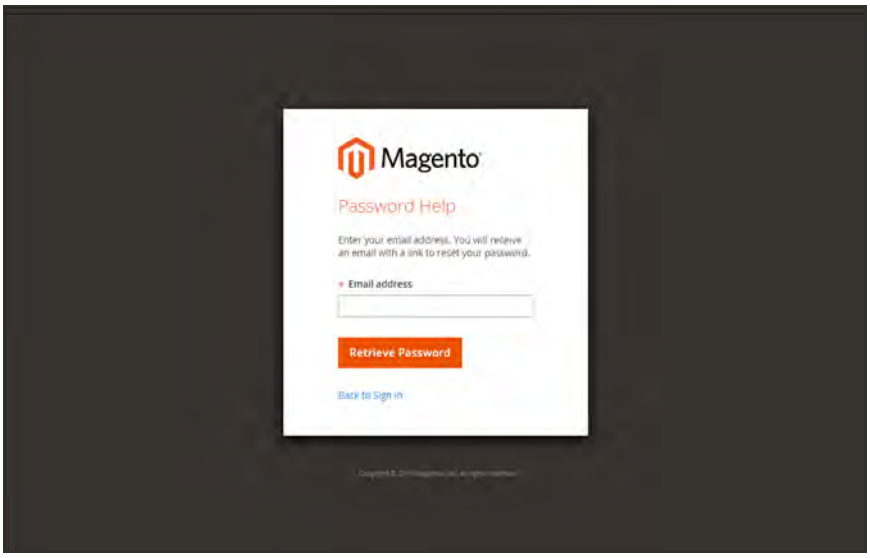
```
http://www.yourdomain.com/admin
```

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

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

To reset your password:

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



Forgot Password

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

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

To sign out of the Admin:

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

Sign Out

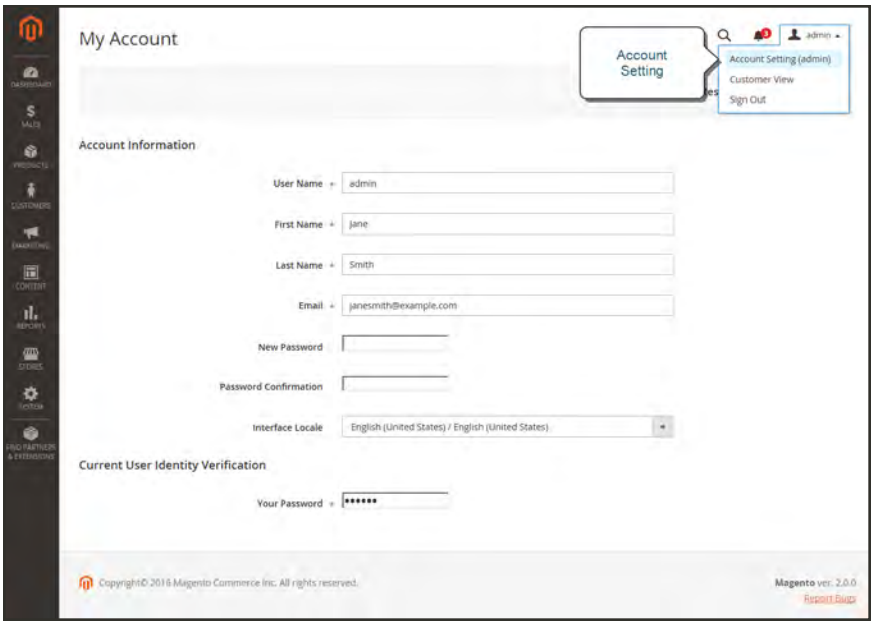
The Sign-In page returns, with a message that you are logged out. It's always a good idea to sign out of the Admin whenever you leave your computer unattended.

Your Admin Account

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

To edit your account information:

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



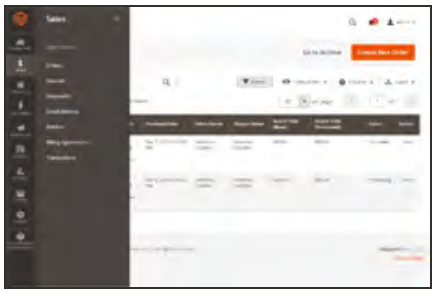
Account Information

Admin Sidebar

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

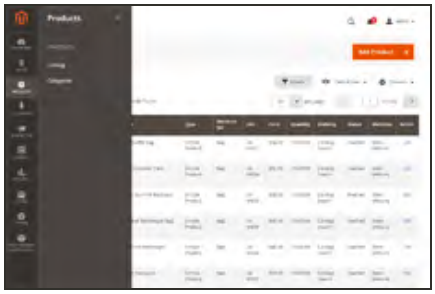
Dashboard

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



Sales

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

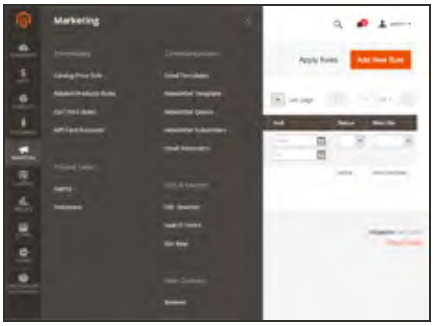


Products

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

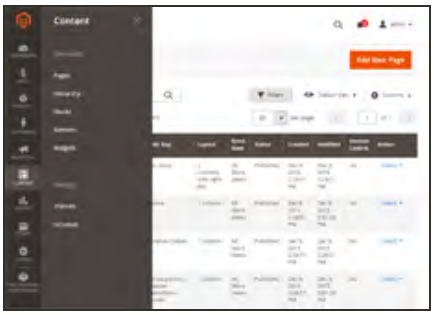
Customers

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



Marketing

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

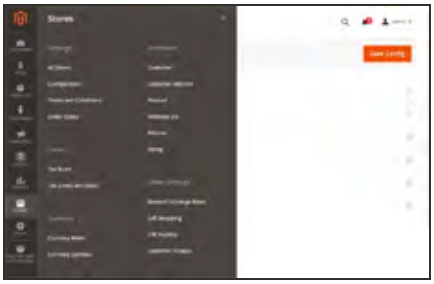


Content

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

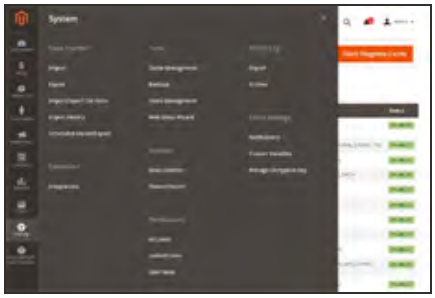
Reports

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



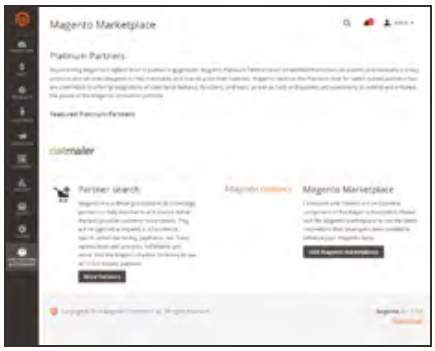
Stores

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



System

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

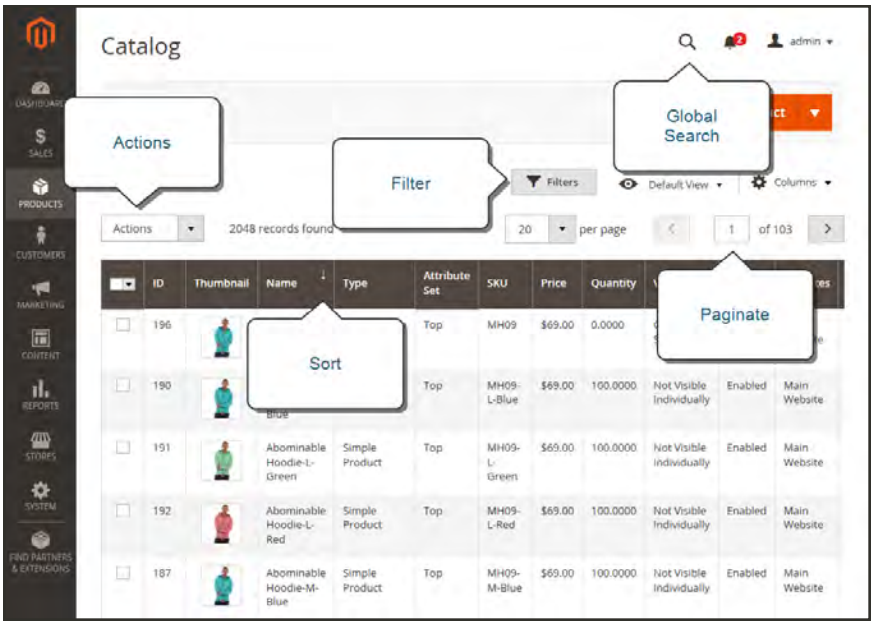


Find Partners & Extensions

This is where you can find a marketplace of 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. You can search, sort, filter, select, and apply actions to records in the grid.



Admin Workspace

Workspace Controls

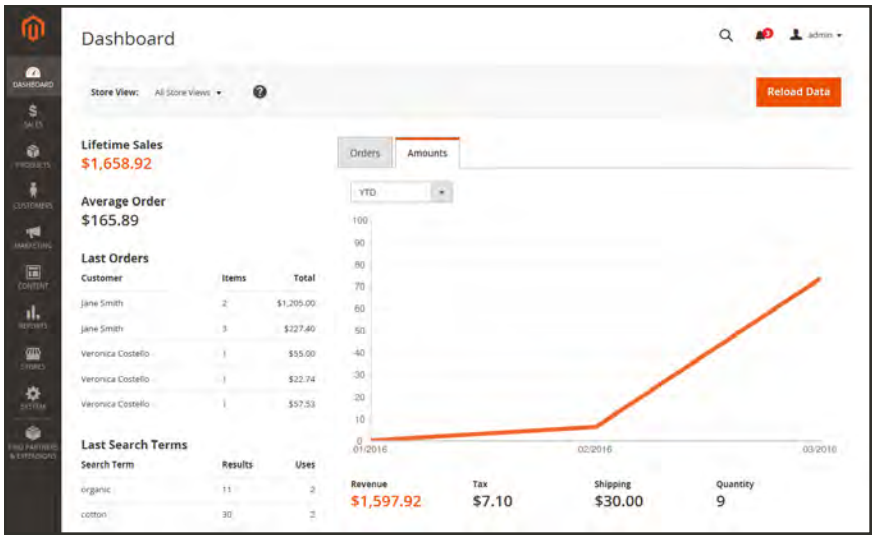
CONTROL	DESCRIPTION
Search	The Global Search box can be used to find any value in the database, including product, customer, and order records.
Sort	From the column header, sort the list in ascending or descending order.
Filter	The filters in the header of each column can be used to limit the list to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

Dashboard

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

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

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



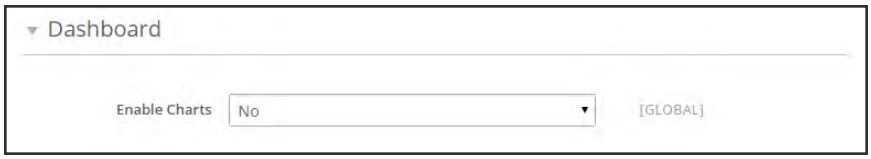
Dashboard

To configure the chart:

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

Enable Charts

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



Dashboard

Set the Beginning Dates

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

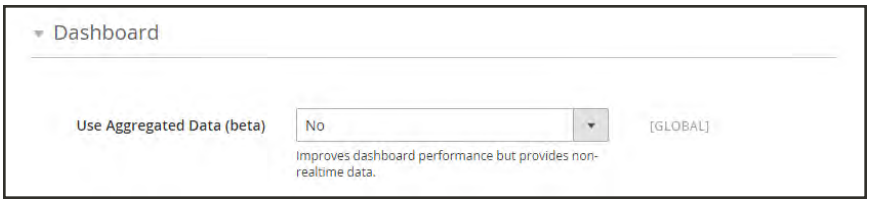
Dashboard

Choose the Data Source

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

1. In the panel on the left, tap to expand **Sales**. Then, choose **Sales**.
2. Tap to expand the **Dashboard** section, and do the following:

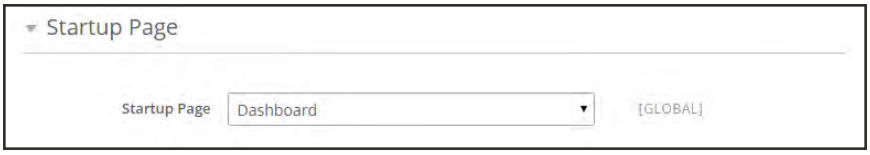
- For real-time data, set **Use Aggregated Data (beta)** to "Yes."
- For historical data, set **Use Aggregated Data (beta)** to "No."



Dashboard

Change the Startup Page

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



Startup Page

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

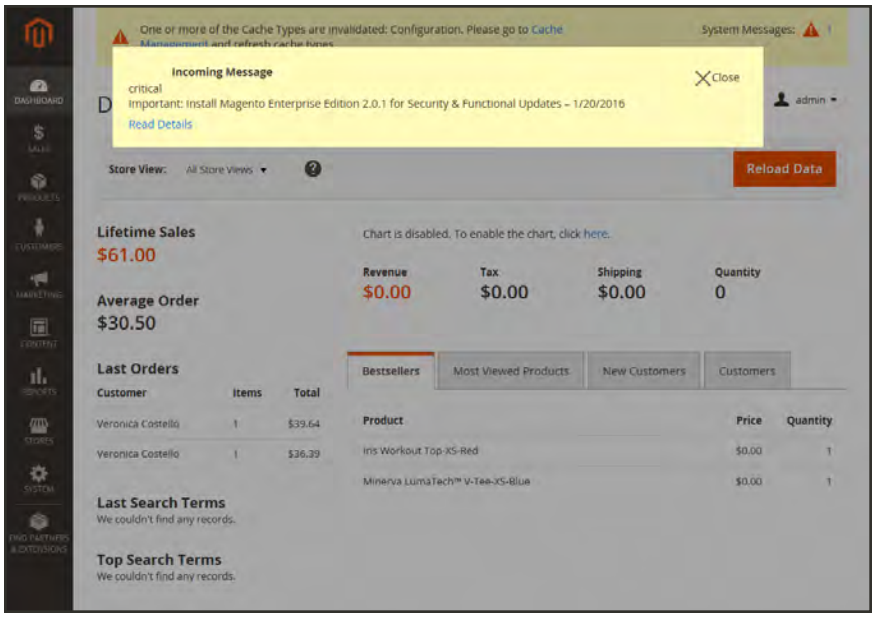
Dashboard Reports

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

Message Inbox

Your store has an inbox for messages from Magento. The messages are rated by importance, and might refer to system updates, patches, new releases, scheduled maintenance, upcoming events, and more. Any message that is considered to be of major importance appears in a pop-up window when you log into your store. You can manage the messages in your inbox as you manage your email. Check it often to receive notice of important system updates and news from Magento.

The notification configuration determines how often your message inbox is updated. If your store Admin has a secure URL, you must set the notifications to be delivered over HTTPS.



Incoming Message

To manage incoming messages:

1. When the Incoming Messages box appears, do one of the following:
   - Tap **Read Details** for more information.
   - Tap the **Close** box to remove the popup and continue.

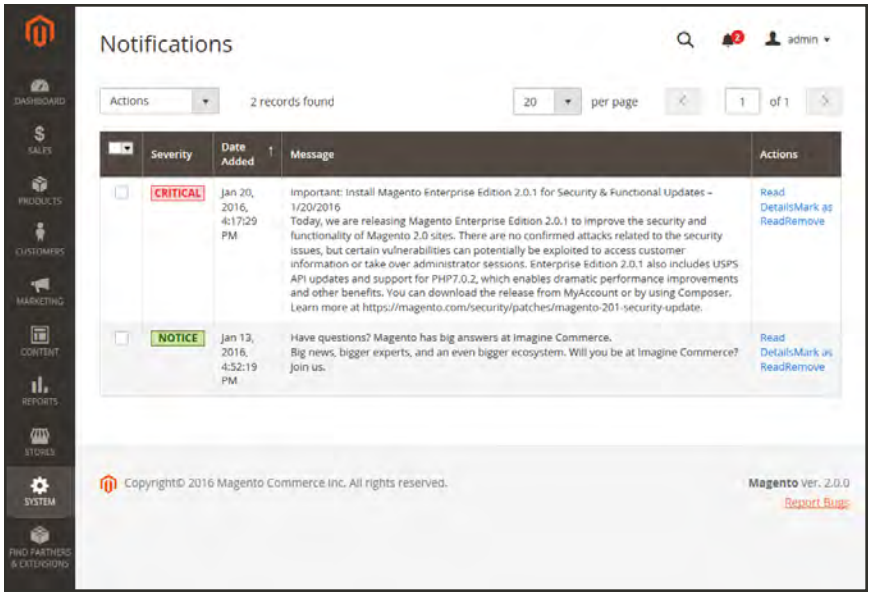
   A Latest Message notice also appears to the left, just below the header of your store. As with the popup box, you can tap **Read Details** for more information.

2. To read your messages, tap **Go to messages inbox**.

   The messages in your inbox are marked by severity, with the most recent at the top.

3. After reading a message, you can do any of the following:

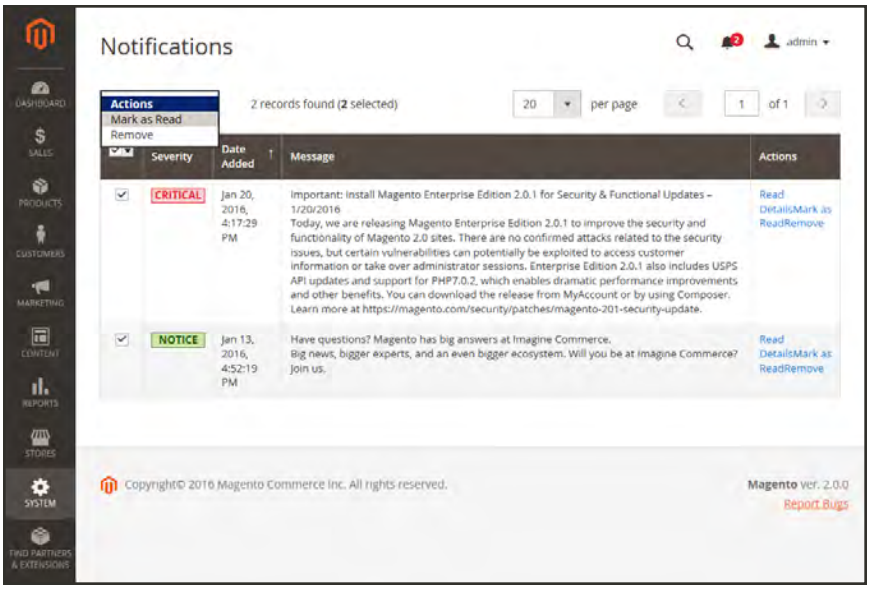
- For more information, tap **Read Details**.
- To keep the message, tap **Mark As Read**.
- To delete the message from your inbox, tap **Remove**.



Notifications

To apply an action to multiple messages:

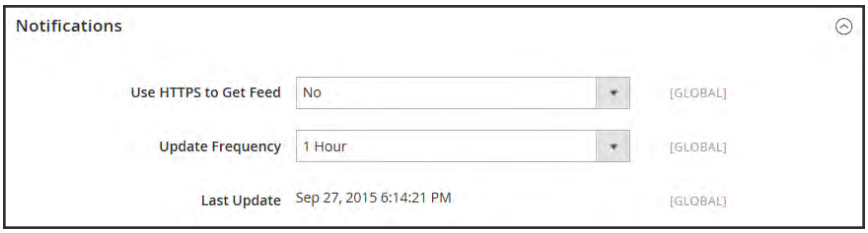
1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Notifications**.
2. In your message inbox, do one of the following:
   - Mark the checkbox at the beginning of each message you want to manage.
   - Choose one of the group selection options above the list to select multiple messages.
3. When the messages that you want to manage are selected, set **Actions** to one of the following:
   - Mark as Read
   - Remove
4. Tap **Submit** to complete the process.



Mark as Read

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.

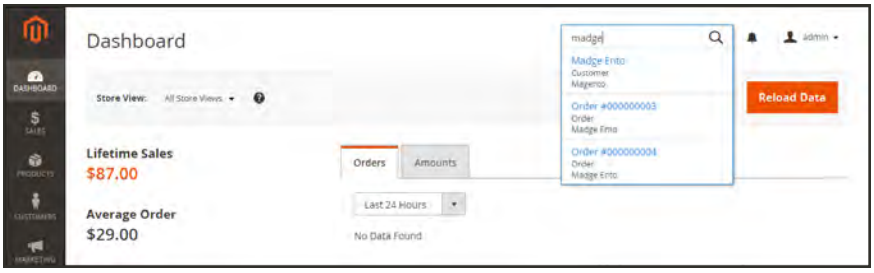


Notifications

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

Global Search

The search box is represented by a magnifying glass at the top of the Admin, and can be used to find any record in the database. The results can include customers, products, orders, or any related attribute. For example, if you enter a customer name, the results might include the customer record as well as any orders that are associated with the name.



Search

To find a close match:

1. In the header, tap the magnifying glass 🔍 to open the search box. Then, enter the first few letters of what you want to find.
2. In the search results, click any item to open the record.

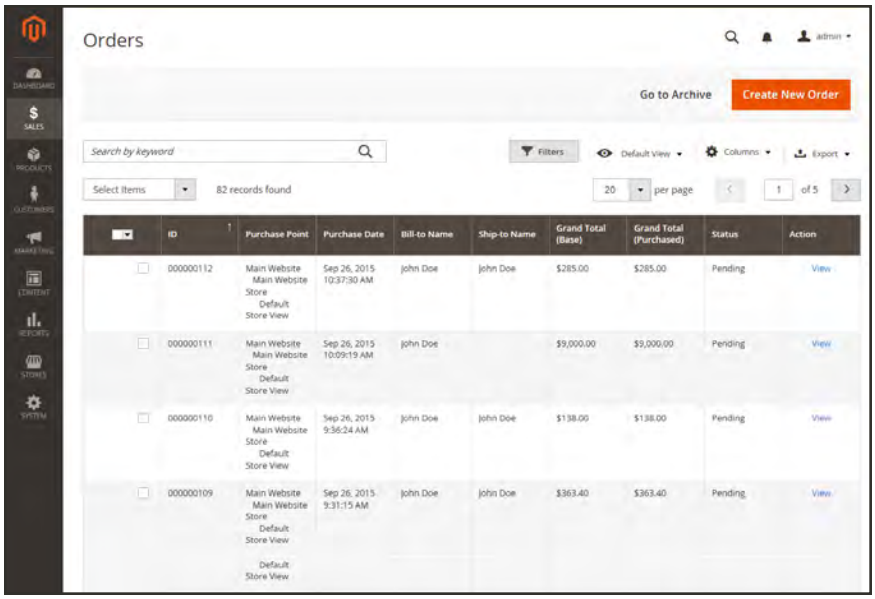
To find an exact match:

1. In the header, tap the magnifying glass 🔍 to open the search box. Then, enter the full word, such as a customer name, product name or SKU, 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 data from the current view can be exported to a CSV or XML file.

The Actions column lists operations that can be applied to an individual record. To apply an action to multiple records, select the checkbox of each record that is to be subject to the action.



Orders Grid

To sort the list:

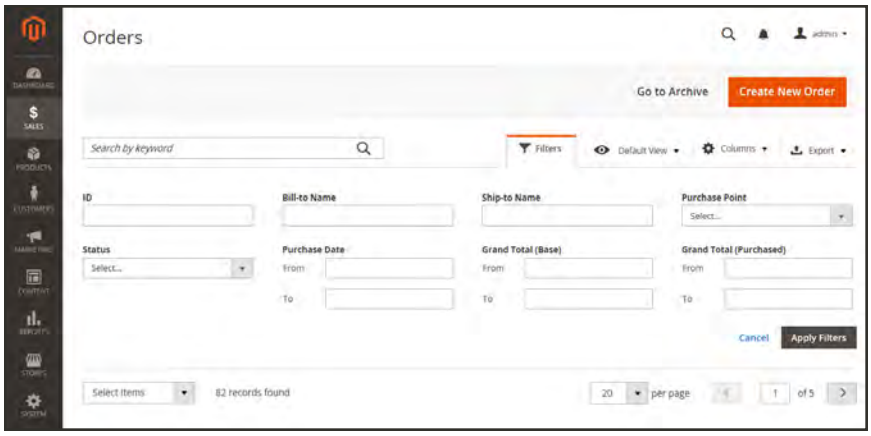
1. Tap any column header. The arrow indicates the current order as either ascending or descending.
2. Use the pagination controls to view additional pages in the collection.

To use the pagination controls:

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:

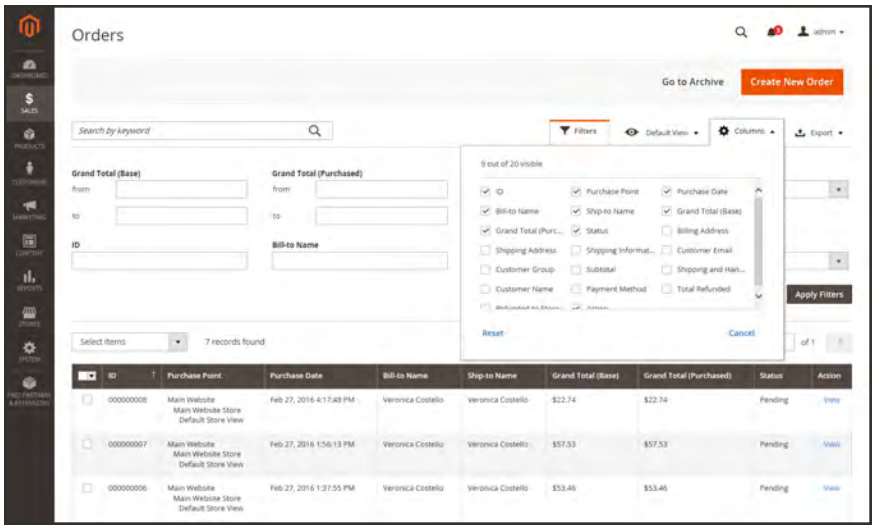
1. Tap **Filters**.
2. Enter as many filters as necessary to describe the record(s) that you want to find.
3. Tap **Search**.



Filter Controls

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 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 view:

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

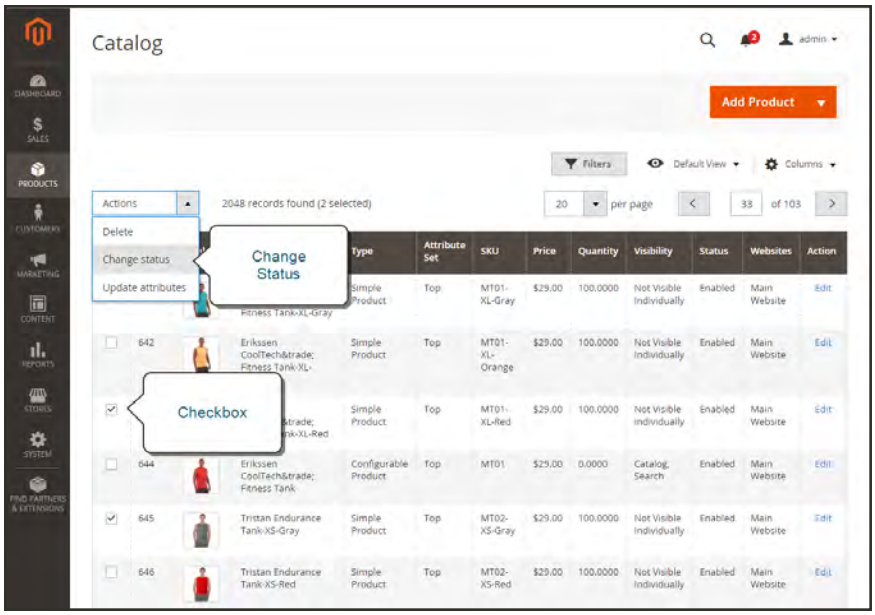
- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** icon. Then, update the name.

Actions Control

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

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

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

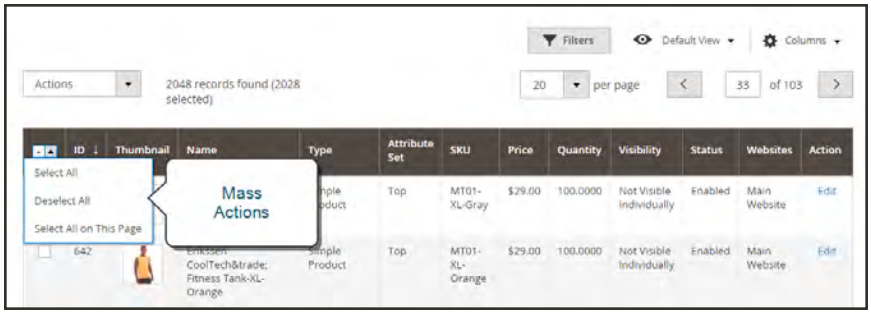


Applying an Action to Selected Records

Step 1: Select Records

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

1. Mark the checkbox of each record that is a target for the action. Or, use the **Mass Actions** control to select a group of records. Options include:
   - Select All / Unselect All
   - Select Visible / Unselect Visible
   - Select All on This Page / Deselect all on This Page



Mass Actions

2. If needed, set the filters at the top of each column to show only the records that you want to include.
3. In the first column, set the checkbox state to one of the following:

Any	Lists all records, regardless of filter settings.
Yes	List only records that match the filter settings.
No	List only records that do not match the filter settings.

Step 2: Apply an Action to Selected Records

1. Set the **Actions** control to the operation that you want to apply.
2. When complete, tap **Submit**.

Mass Actions

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

Checkbox States

STATE	DESCRIPTION
Any	Lists all records, regardless of checkbox status.
Yes	Lists only records with the checkbox selected.
No	Lists only records without the checkbox selected.

Actions by Grid

MENU	LIST	ACTIONS
SALES		
	Orders	Cancel Hold Unhold Print Invoices Print Packing Slips Print Credit Memos Print All Print Shipping Labels Move to Archive
	Invoices	PDF Invoices
	Shipments	PDF Packing Slips Print Shipping Labels
	Credit Memos	PDF Credit Memos

Actions by Grid (cont.)

MENU	LIST	ACTIONS
PRODUCTS		
	Catalog (Inventory)	Delete Change Status Update Attributes
	Google Content Items	Delete Synchronize
CUSTOMERS		
	All Customers	Delete Subscribe to Newsletter Unsubscribe from Newsletter Assign a Customer Group
MARKETING		
Communications		
	Newsletter Subscribers	Unsubscribe Delete
SEO & Search		
	Search Terms	Delete
User Content		
	Reviews	Delete Update Status
CONTENT		
Elements		
	Pages	Delete
	Blocks	Delete

Actions by Grid (cont.)

MENU	LIST	ACTIONS
REPORTS		
	Refresh Statistics	Refresh Lifetime Statistics Refresh Statistics for the Last Day
STORES		
Settings		
	Order Status	Unassign
SYSTEM		
Tools		
	Cache Management	Enable Disable Refresh
	Backups	Delete
	Index Management	Update on Save Update by Schedule
Other Settings		
	Notifications	Mark as Read Removed

Notes

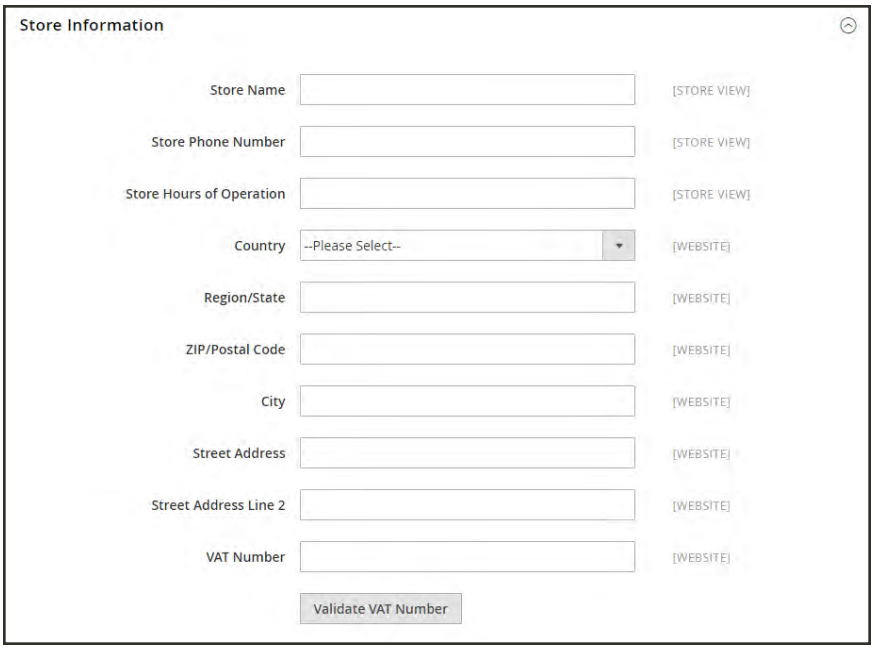
CHAPTER 6:

Store Details

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

Store Information

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



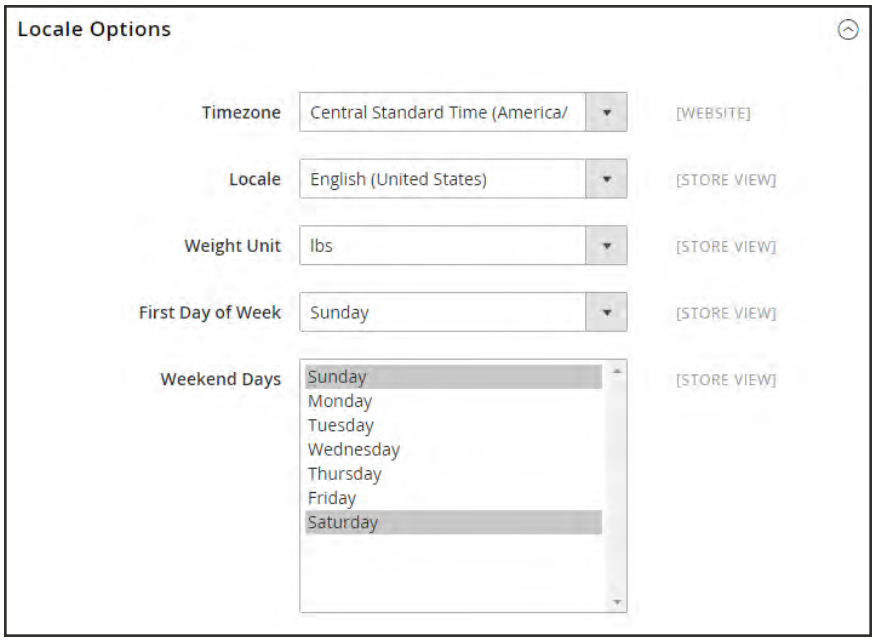
Store Information

To enter your store information:

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

Locale Options

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



Locale Options

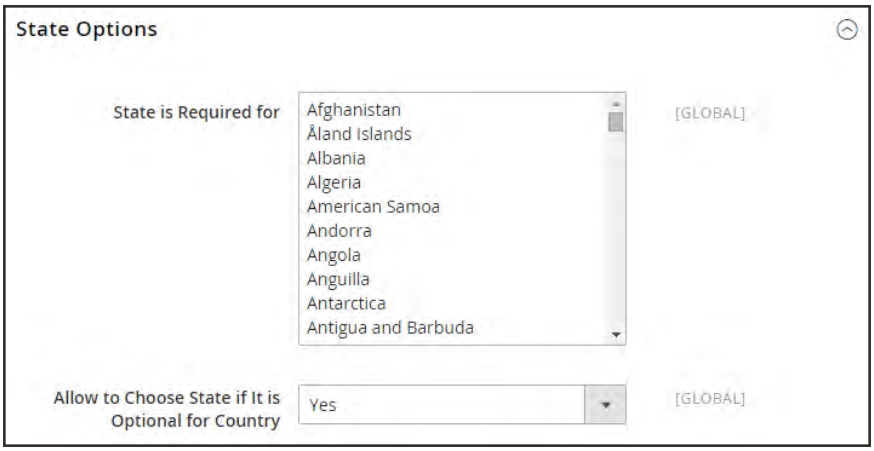
To set the store locale:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand the **Locale Options** section.
4. Select your **Timezone** from the list. Then, do the following:
   a. Set **Locale** to the store language.
   b. Set **First Day of the Week** to the day that is considered to be the first day of the week in your area.
   c. 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.



State Options

To set up the state options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under General, choose **General**.
3. Expand the **State Options** section, and do the following:
   a. In the **State is required for** list, select each country where Region/State is a required entry.

      To select multiple options, hold down the Ctrl key and click each option.

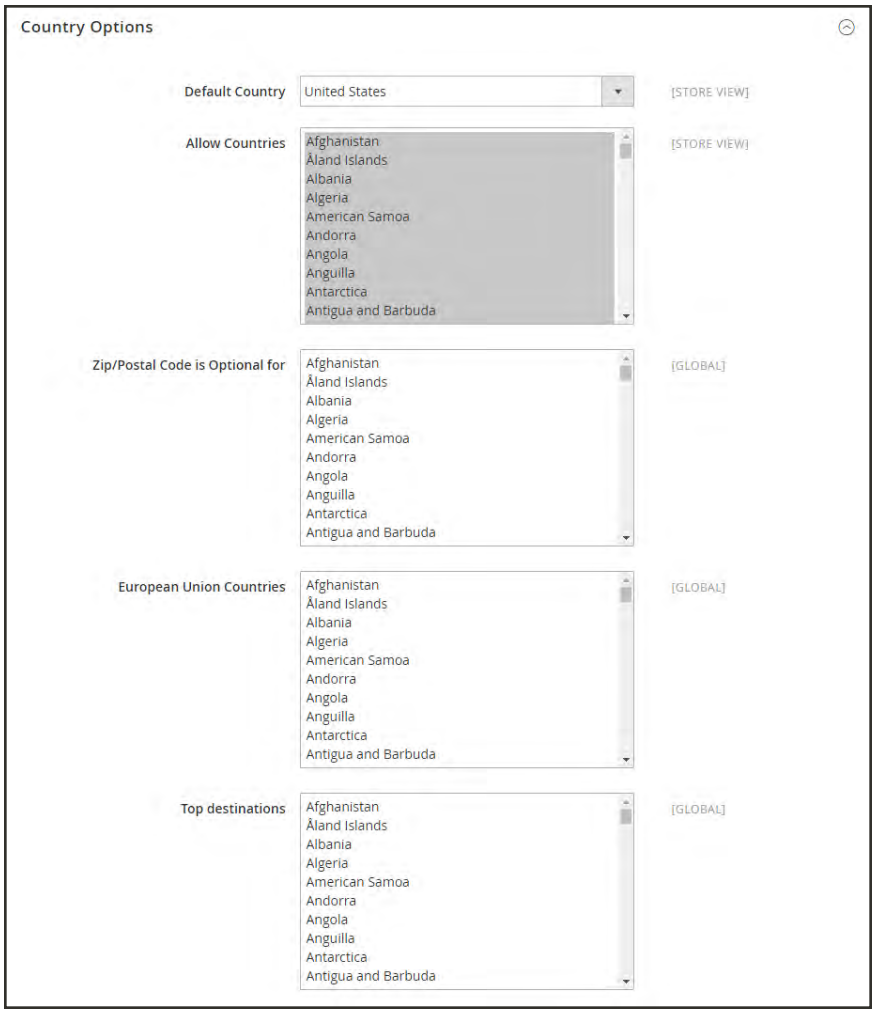
   b. Set the **Allow to Choose State if It is Optional for Country** field to one of the following:

Yes	In countries where the state field is not required, includes the State field as an optional entry.
No	In countries where the state field is not required, omits the State field.

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

Country Options

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



Country Options

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.

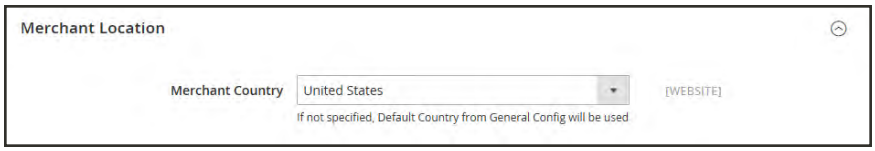
c. In the **Zip/Postal Code is Optional for** list, select each country where you conduct business that does not require a ZIP or postal code to be included as part of the street address.

d. In the **European Union Countries** list, select each country in the EU where you conduct business. By default, all EU countries are selected.

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

Merchant Location

The Merchant Location setting is used to configure payment methods. If no value is entered, the Default Country setting is used. The selection of payment methods that is available in the configuration is determined by the Merchant Country setting.



Merchant Location

To enter the merchant location:

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

Currency

Magento Enterprise Edition 2.0 gives you the ability to accept currencies from more than two hundred countries around the world.

Currency Setup

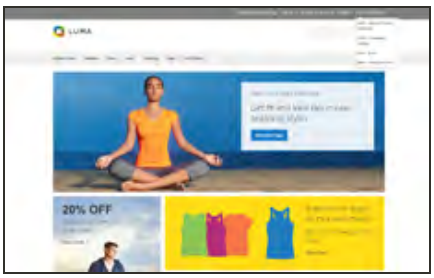
The Currency configuration defines the base currency of your store, any additional currencies that are accepted as payment, and establishes the import connection and schedule that is used to update currency rates automatically.

Currency Symbols

Defines the currency symbols that appear in product prices and sales documents such as orders and invoices.

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 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

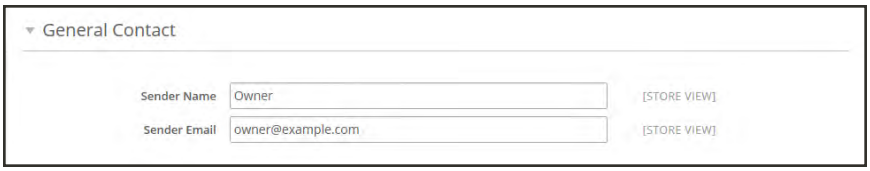
Step 3: Update the Sales Email Configuration

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

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**.

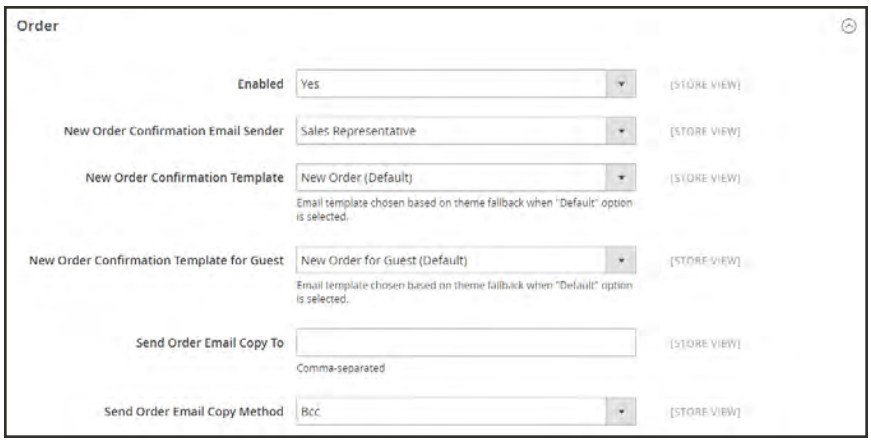
Step 3: Update the Sales Email Configuration

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

2. Starting with **Order**, expand the section for each message, and make sure that the correct sender is selected.

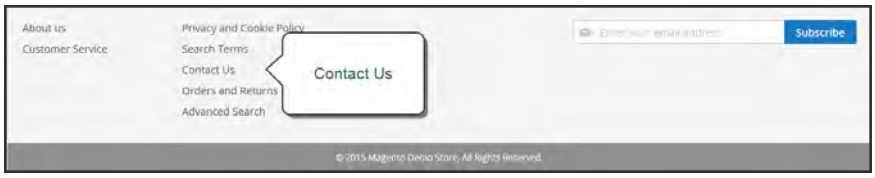


Sales Email Order Configuration

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

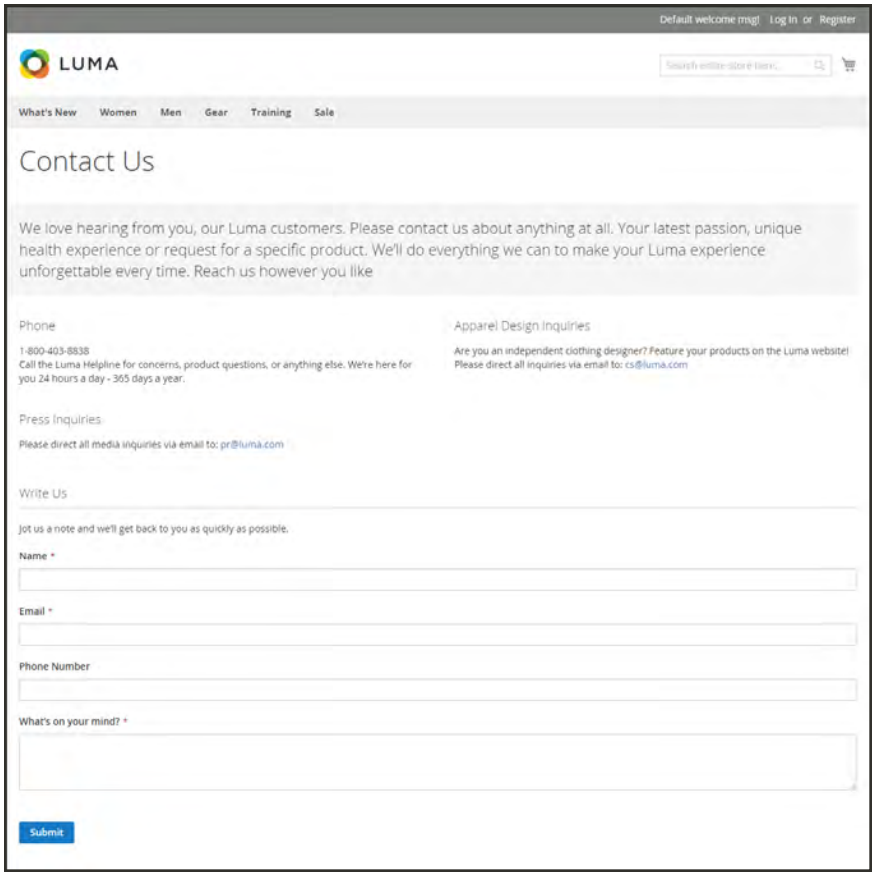
Contact Us

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



Contact Us in Footer

After the form is submitted, a thank you message appears. The `contact-us-info` block that contains the form can be easily customized from the Content menu.



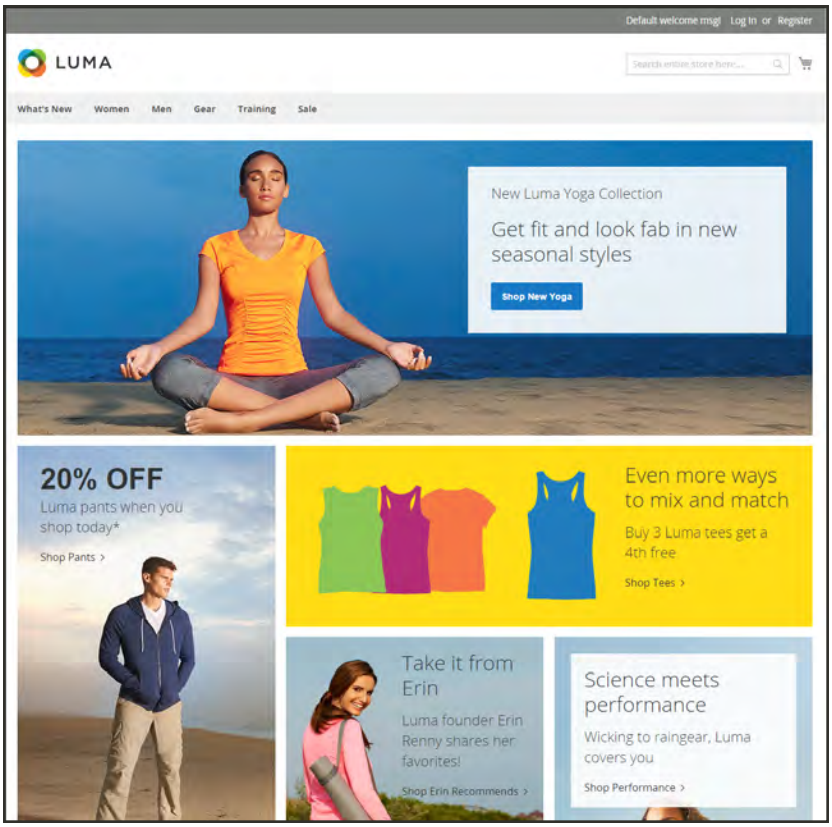
Contact Us Form

Notes

CHAPTER 7:

Storefront Branding

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



Branded Storefront

Uploading Your Logo

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

Logo in Header

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

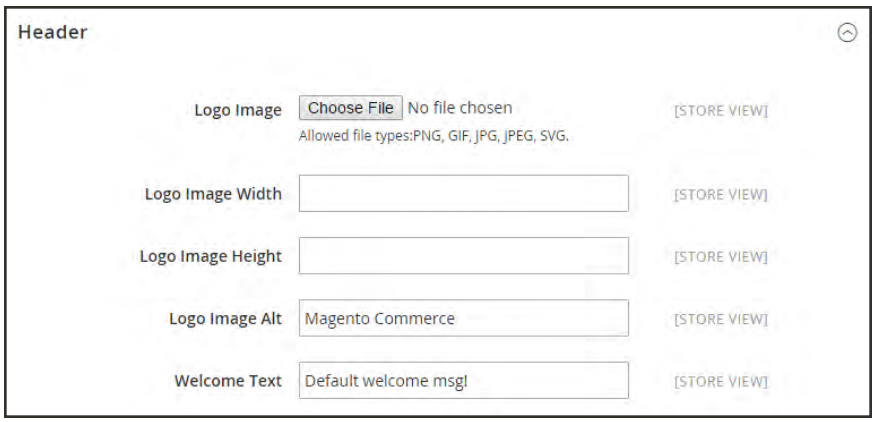
Actual path: `app/design/frontend/<vendor>/<theme>/web/images/logo.svg`

Relative path: `images/logo.svg`

An easy way to determine the size is to right-click the image and look at the Properties tab. Or save the file and open it in an image editor.

To upload your logo:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General** choose **Design**.
3. If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
4. Expand the **Header** section. Then, do the following:



Header

a. To upload a new logo, tap Browse. 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.

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

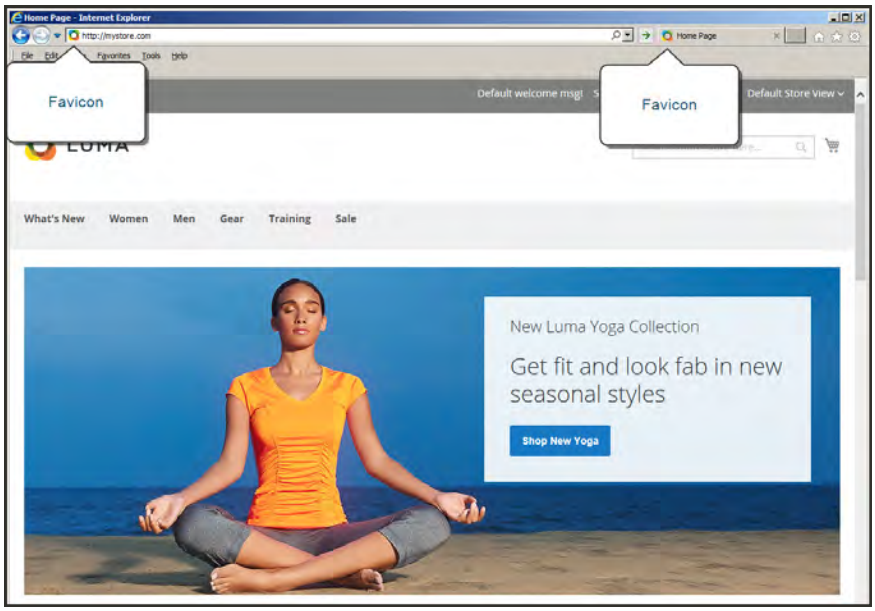
Image File Formats

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

Adding a Favicon

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

Favicons are generally 16 x 16 pixels or 32 x 32 pixels in size. Magento accepts ICO, PNG, JPG, and SVG file types, although not all browsers support these formats. The most widely-supported file format to use for a favicon is ICO. 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

Process Overview:

Step 1: Create a Favicon

Step 2: Upload the Favicon to Your Store

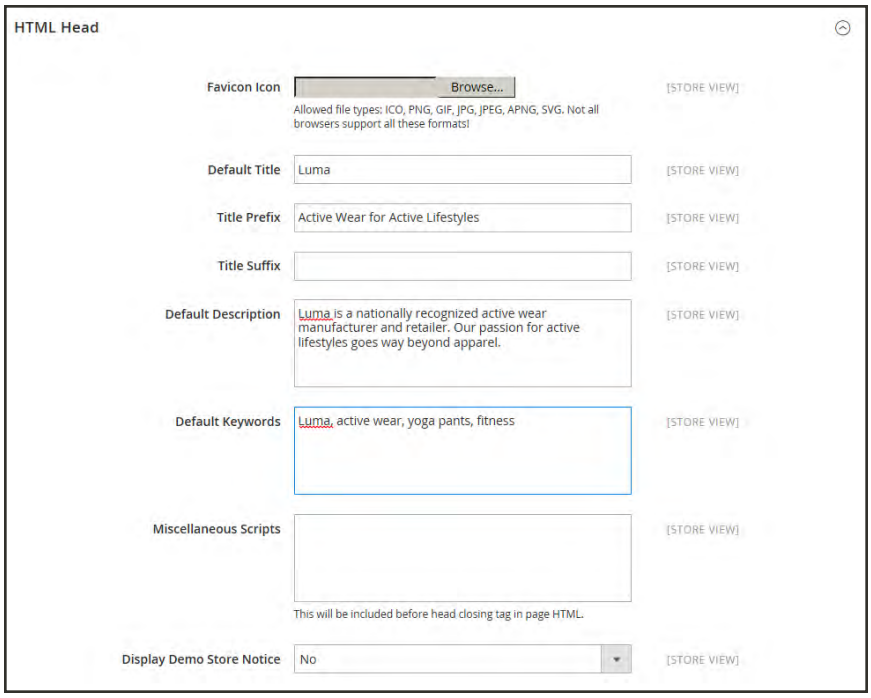
Step 3: Refresh the Cache

Step 1: Create a Favicon

1. Create a 16x16 or 32x32 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 **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand the **HTML Head** section. Then, do the following:



HTML Head

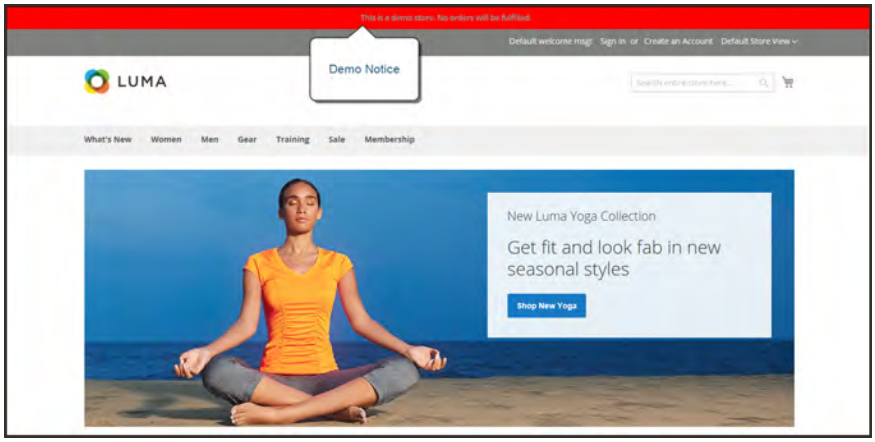
   a. Tap **Choose File**. Then, find the favicon file that you prepared.
   b. If you want to delete the current favicon, mark the **Delete Image** checkbox.
4. When complete, tap **Save Config**.

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.

Store Demo Notice

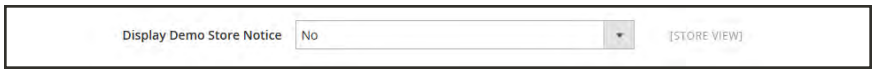
If your store is online, but still under construction, you can display a store demo notice at the top of the page to let people know that the store is not yet open for business. When you are ready to "go live," simply remove the message. It's like flipping the sign hanging in the window from "Closed"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



Store Demo Notice

To set the store demo notice:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand the **HTML Head** section.
4. Scroll down to the bottom, and set the **Display Store Demo Notice** to your preference.



HTML Head

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

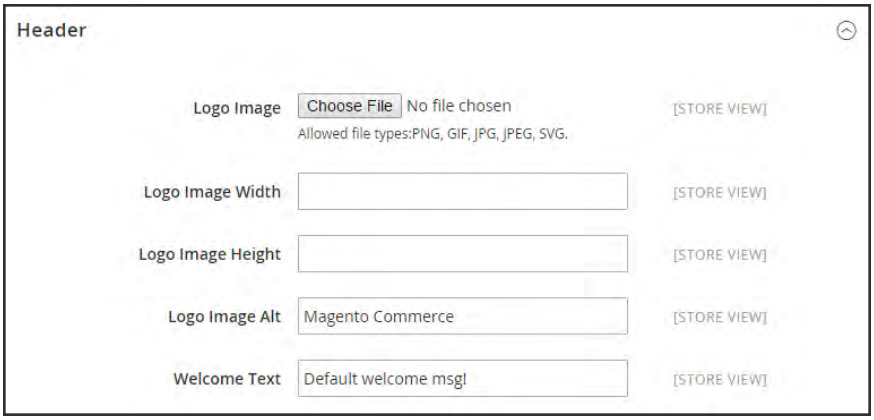
Changing the Welcome Message

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

Welcome Message

To change the welcome message:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. If you have multiple stores or views, set the **Store View** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
4. Expand the **Header** section. Then, enter the **Welcome Text** that you want to appear.



Header

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

Copyright Notice

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

Copyright Notice

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

Long Format Example

```
Copyright &Copy; 2015 Magento, Inc. All rights reserved.
```

Short Format Example

```
&Copy; 2015 Magento, Inc. All rights reserved.
```

To change the copyright notice:

1. On the Admin sidebar, tap **Stores**. Then under **Settings** choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand the **Footer** section.

Footer

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

Notes

CHAPTER 8:

Websites, Stores & Views

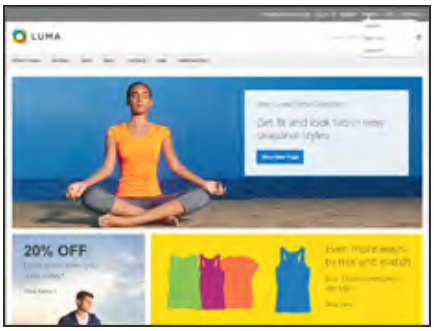
A single installation of Magento Enterprise Edition 2.0 can include multiple websites, stores, and views, all managed from the same Admin. The scope determines which website, store, or view is affected by a configuration setting.

Websites

Magento 2 installations begin with a single website called “Main Website.” You can also set up multiple websites, each with its own domain.

Stores

A single website can have multiple stores, each with a separate main menu. Each store can have a different product selection and appearance, but are managed from the same Admin.



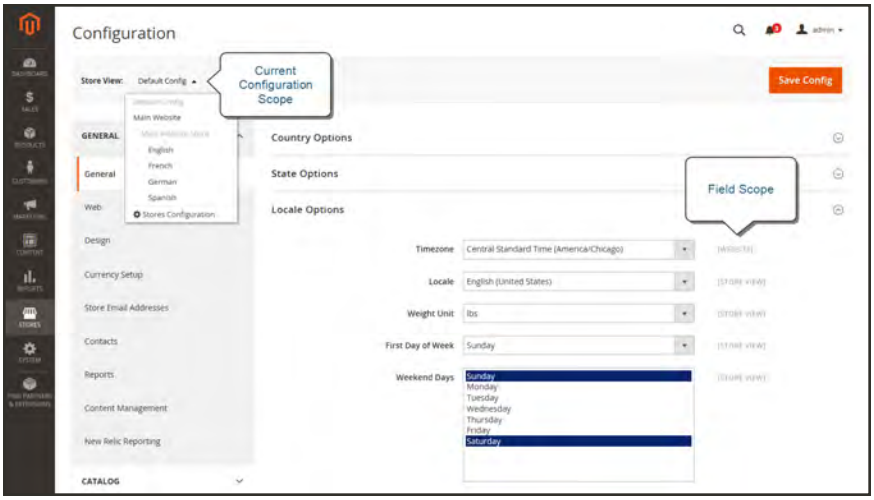
Store Views

Store views are usually used to make the store available in different languages. Customers can use the language chooser in the header to change the store view.

Configuration Scope

Your Magento installation has the capacity to maintain separate websites, stores, and store views. If your installation has a hierarchy of websites, stores, or views, you can set the scope of a configuration setting to apply to a specific part of the installation. For Admin users with restricted access, the list of available areas includes only those where the user has been granted permission.

The Store View control in the upper-left corner of Admin pages determines the scope of the configuration. By default, the scope is set to “All Store Views.” The configuration scope applies to products categories, attributes, customer management settings, and so on. The scope of each item appears in brackets after the field to indicate the range of the setting. If your installation includes multiple websites, stores or views, you should always set the Store View control first to identify where the configuration settings apply.



Store View Control

Any item with the scope of [STORE] can be set differently for each store view. For example, because the scope of the product name and description is [STORE], the fields can have a different value for each language. However, some configuration settings, such as postal code, are [GLOBAL] and have the same setting throughout the system. The [WEBSITE] scope also applies to the entire site, including all store views.

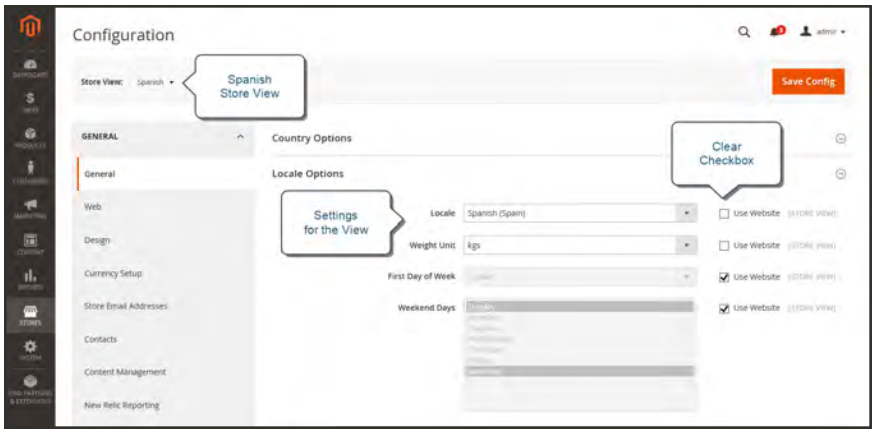
To set the configuration scope:

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

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
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 is to apply. When prompted to confirm scope switching, tap **OK**.

      A checkbox appears after each field, and sometimes additional fields become available.

   b. Clear the **Use Website** checkbox after any field that you want to edit. Then, update the value for the store view.



Changing the Locale of a View

   c. Repeat this process for every field that needs to be updated on the page.

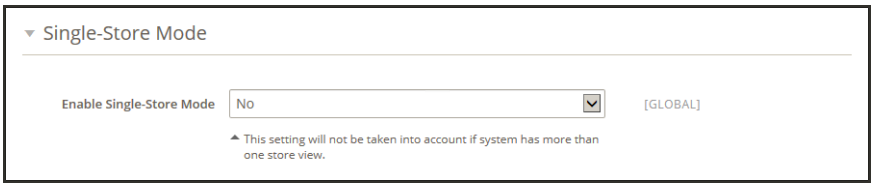
3. When complete, tap **Save Config**.

Scope Settings

SCOPE	DESCRIPTION
Store	The setting is limited to the store view, which is often used to display a store in multiple languages.
Website	The setting is limited to the website.
Global	The setting applies to the entire installation.

Single Store Mode

If your Magento 2 installation has only a single store and view, you can simplify the display by turning off all Store View options and scope indicators. Some of the screenshots in this guide were taken with Single Store Mode disabled, which causes a scope indicator to appear after configuration settings. The Single Store Mode setting is overridden if you later add a store view.



Single Store Mode Disabled

To set single store mode:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. 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

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

CHAPTER 9:

Industry Compliance

Magento Enterprise Edition 2.0 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.

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 the Cookie Law, which is a requirement in some countries, and considered 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 the need to maintain a secure hosting environment, there are additional requirements that merchants must meet to ensure the privacy of cardholder data. Every merchant who handles customer credit card information is required by the Payment Card Industry to conduct business within the following guidelines:

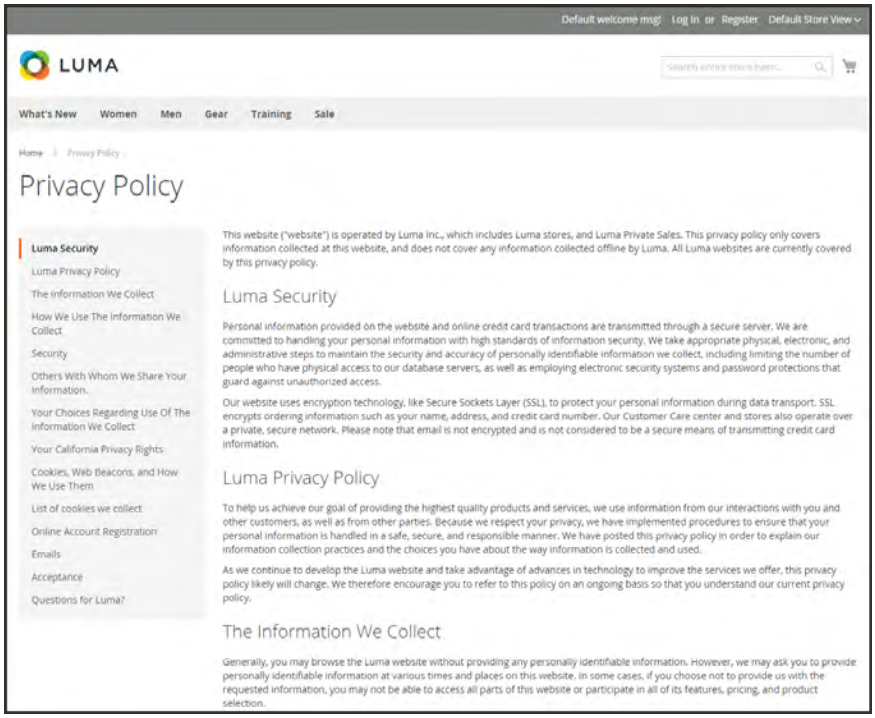
PCI Requirements

- 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.

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.

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:

1. On the Admin sidebar, tap **Content.** Then under Elements, choose **Pages**.
2. Find the privacy policy in the list, and tap to open the page in edit mode.
3. In the panel on the left, choose **Content**.
4. Make the necessary changes to the content.

> 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 footer will return “404 Page Not Found.”

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

Cookie Law Compliance

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

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.

Expressed Consent

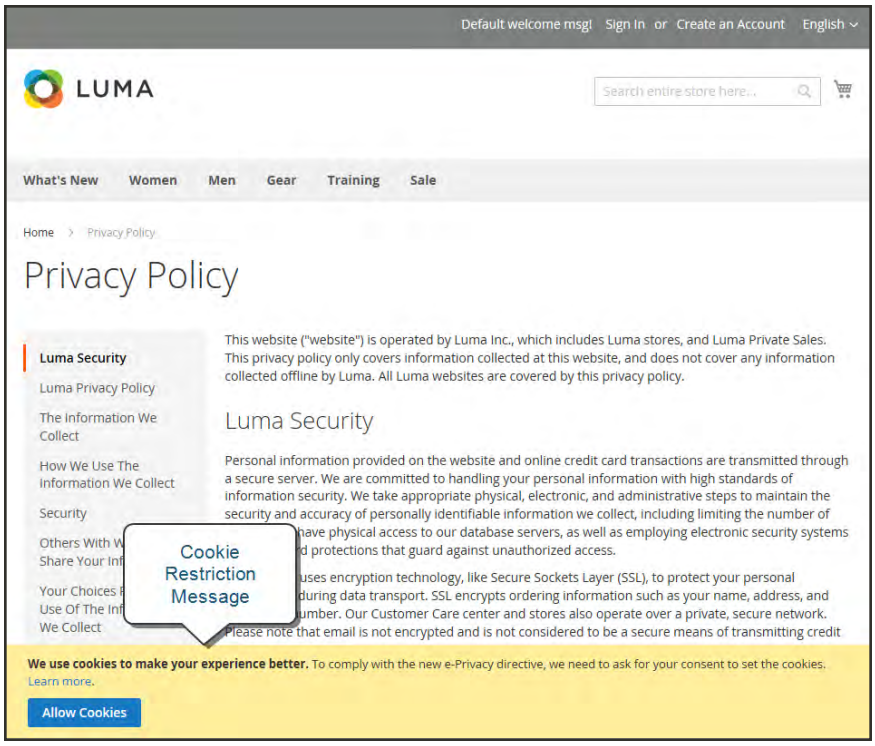
Operating your store in cookie restriction mode requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable. For example, if Google Analytics is available for your store, it can be invoked only 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 tap the Allow Cookies button to grant consent. After consent is granted, the message disappears.

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

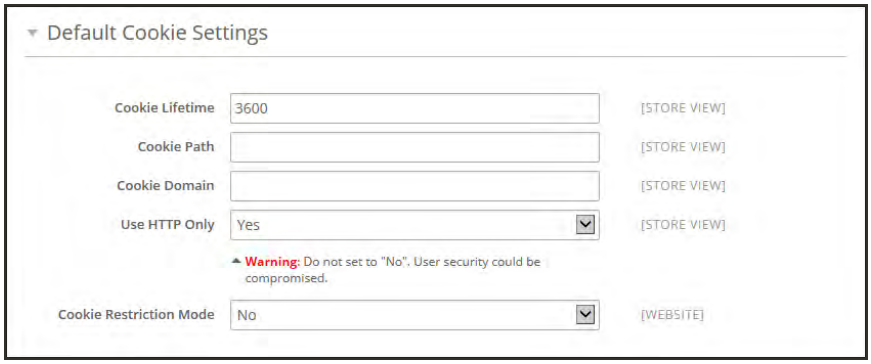
> If you change the URL key of the privacy policy, you must also create a custom URL rewrite to redirect traffic to the new URL key. Otherwise, the link in the Cookie Restriction Mode message will return "404 Page Not Found."



Cookie Restriction Notice In Footer

Step 1: Enable Cookie Restriction Mode

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



Default Cookie Settings

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

Step 2: Update Your Privacy Policy

1. On the Admin sidebar, tap **Content**. Then under Elements, choose **Pages**.
2. Find your **Privacy Policy** in the list, and open the page in edit mode.
3. In the panel on the left, click **Content.** Then, update the content as needed to describe the information that your company collects, and how it is used.
4. When complete, tap **Save Page**.

Cookie Reference

Magento Standard Cookies

COOKIE NAME	COOKIE DESCRIPTION
CART	The association with your shopping cart.
CATEGORY_INFO	Stores the category info on the page, that allows to display pages more quickly.
COMPARE	The items that you have in the Compare Products list.
CUSTOMER	An encrypted version of your customer id with the store.
CUSTOMER_AUTH	Indicates if you are currently logged into the store.
CUSTOMER_INFO	An encrypted version of the customer group you belong to.
CUSTOMER_SEGMENT_IDS	Stores the Customer Segment ID.
EXTERNAL_NO_CACHE	Indicates if caching is disabled or enabled.
FRONTEND	Your session ID on the server.
GUEST-VIEW	Allows guests to edit their orders.
LAST_CATEGORY	The last category you visited.
LAST_PRODUCT	The most recent product you have viewed.
NEWMESSAGE	Indicates whether a new message has been received.
NO_CACHE	Indicates whether it is allowed to use cache.
PERSISTENT_SHOPPING_CART	A link to information about your cart and viewing history if you have asked the site.
RECENTLYCOMPARED	The items that you have recently compared.
STF	Information on products you have emailed to friends.
STORE	The store view or language you have selected.

Magento Standard Cookies (cont.)

COOKIE NAME	COOKIE DESCRIPTION
USER_ALLOWED_SAVE_COOKIE	Indicates whether a customer allowed to use cookies.
VIEWED_PRODUCT_IDS	The products that you have recently viewed.
WISHLIST	An encrypted list of products added to your Wishlist.
WISHLIST_CNT	The number of items in your Wishlist.

Google Analytics Cookies

COOKIE	DESCRIPTION
_utma	Distinguishes users and sessions.
_utmb	Determines new sessions/visits.
_utmc	Determines if the user was in a new session/visit.
_utmz	Stores the traffic source or campaign that explains how the user reached your site.

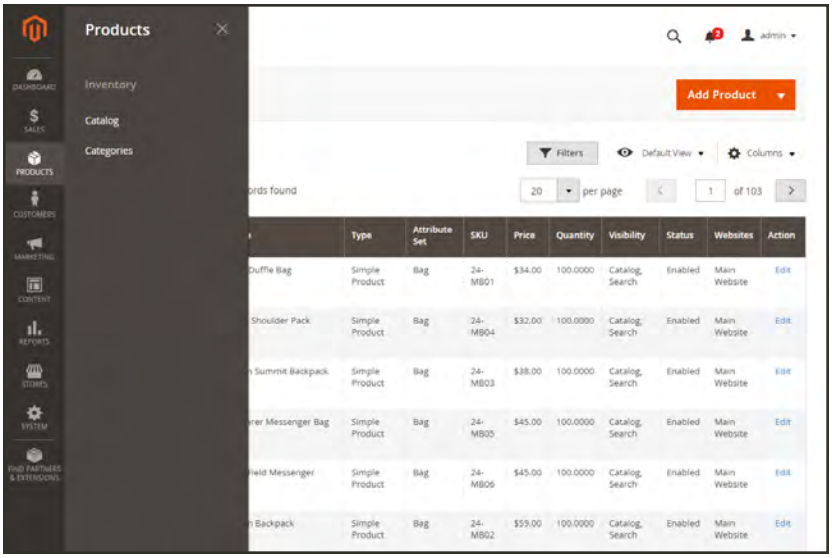
PRODUCTS

Contents

CHAPTER 10:

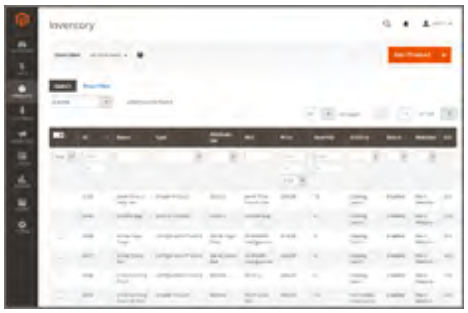
Products Menu

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



Products Menu

Menu Options



Catalog

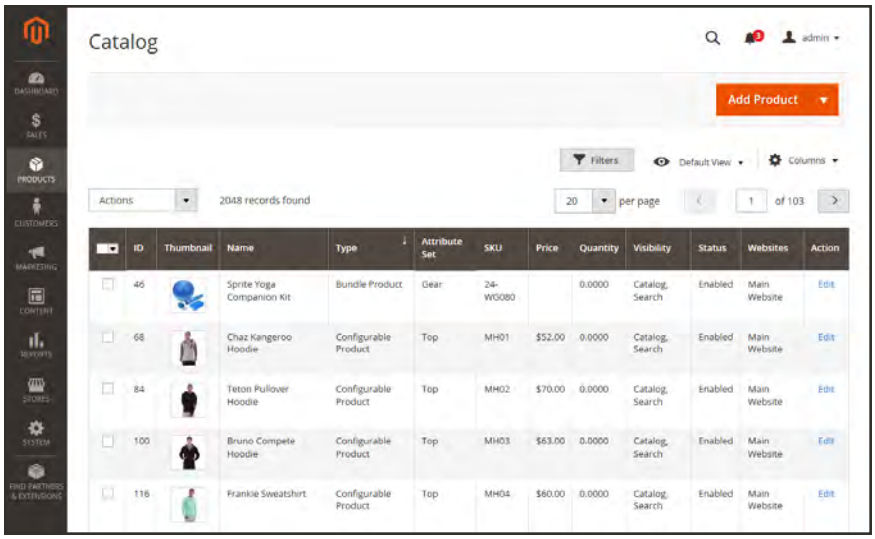
Create new products of every type, and manage your inventory.

Categories

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

Catalog Workspace

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



Catalog Grid

Workspace Controls

CONTROL	DESCRIPTION
Store View	Sets the scope to a specific view.
Add Product	Click the Add Product button to create a new simple product. To choose a specific product type, click the down arrow. Options include: Simple Product Configurable Product Grouped Product Virtual Product Bundle Product Downloadable Product Gift Card
Search	Initiates a catalog search based on the current filters.

Workspace Controls (cont.)

CONTROL	DESCRIPTION
Reset Filter	Restores all filters to a blank state.
Actions	Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Product list actions include: Delete Change Status Update Attributes
Mass Actions	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 All, Unselect All, Select Visible, and Unselect Visible
Submit	Applies the current action to selected product records.
Edit	Opens the product in edit mode. You can accomplish the same thing by clicking anywhere on the row.

Columns

COLUMN	DESCRIPTION
Selection State	Determines how products are listed when the checkbox is marked. Options: Any — Lists all records, regardless of checkbox status. Yes — Lists only records with the checkbox marked. No — Lists only records without the checkbox marked.
ID	A unique, sequential number that is assigned when a new product is saved for the first time.
Name	The product name.
Type	The product type. Options include: Simple Product Virtual Product Bundle Product

Columns (cont.)

COLUMN	DESCRIPTION
	Downloadable Product Grouped Product Configurable Product
Attribute Set	The product template upon which the product is based.
SKU	A unique Stock Keeping Unit that is assigned to the product.
Price	The unit price of the product.
Quantity	The quantity currently in stock.
Visibility	Indicates where in the catalog the product is visible. Options: Not Visible Individually Catalog Search Catalog, Search
Status	Indicates the current status of the product. Options: Enabled Disabled
Websites	Indicates the website(s) where the product is available.

Product Scope

For installations with multiple websites, stores, and views, the scope determines where products are available for sale, and manages the product information for each store view. Initially, all products that you create are published to the default website, store, and 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 from view. However, if your store has multiple views, a scope indicator appears to the right of each field.

To edit the product information for a specific view, use the Store View control in the upper-left corner to select the view. After the view is selected, additional controls become available for any field that can be edited at the store view level. In the following example, although the Spanish store view is selected, the product information is still in the language of the default store view.

The process of editing a product for a store view can be likened to adding a layer of product information that is specific to the view. For example, you can 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 product information for a different view:

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

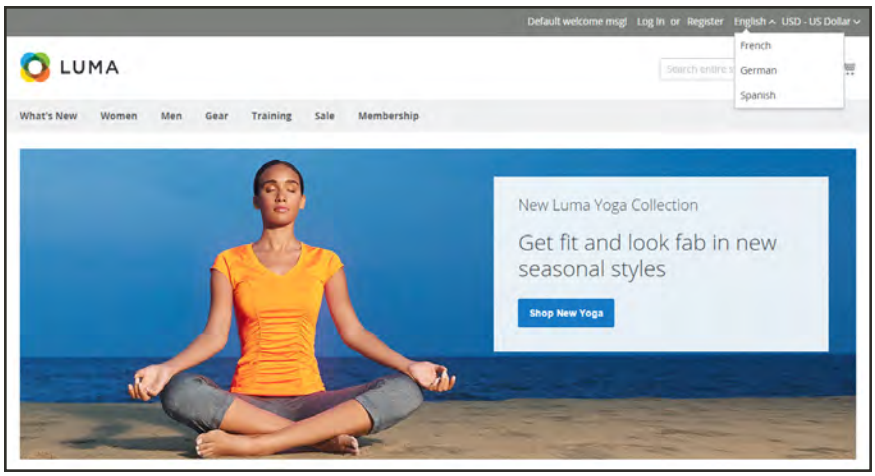
Store View

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

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

Customer View

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



Language Chooser

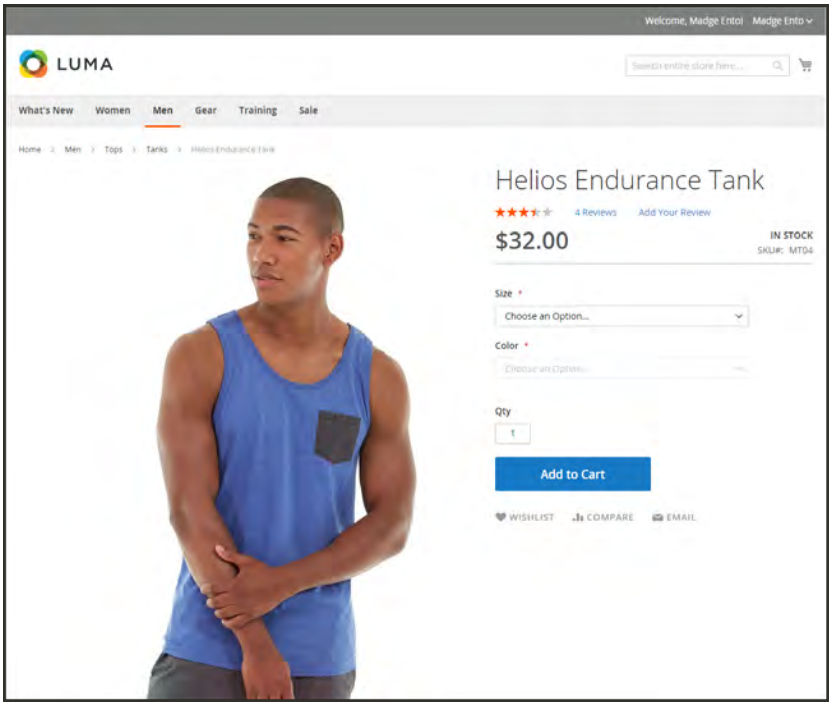
Notes

CHAPTER 11:

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] refers to a product that requires the customer to choose from a selection of options before making a purchase. To learn more about the available options, see Basic Settings and Advanced Settings.

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



Product Catalog

[1] A product that requires the customer to choose from a selection of options.

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.

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=tee+shirt
```

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.

```
http://mystore.com/accessories/eyewear.html

http://mystore.com/catalog/product/view/id/409/s/chelsea-tee-
409/category/16/
```

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. 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 is changed.

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 the suffix 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 a category URL with, and without, the suffix.

```
http://mystore.com/accessories/eyewear.htm

http://mystore.com/accessories/eyewear.html

http://mystore.com/accessories/eyewear/retro-chic-eyeglasses
```

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.

```
http://mystore.com/accessories/eyewear/retro-chic-eyeglasses

http://mystore.com/retro-chic-eyeglasses
```

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.

To configure catalog URLs:

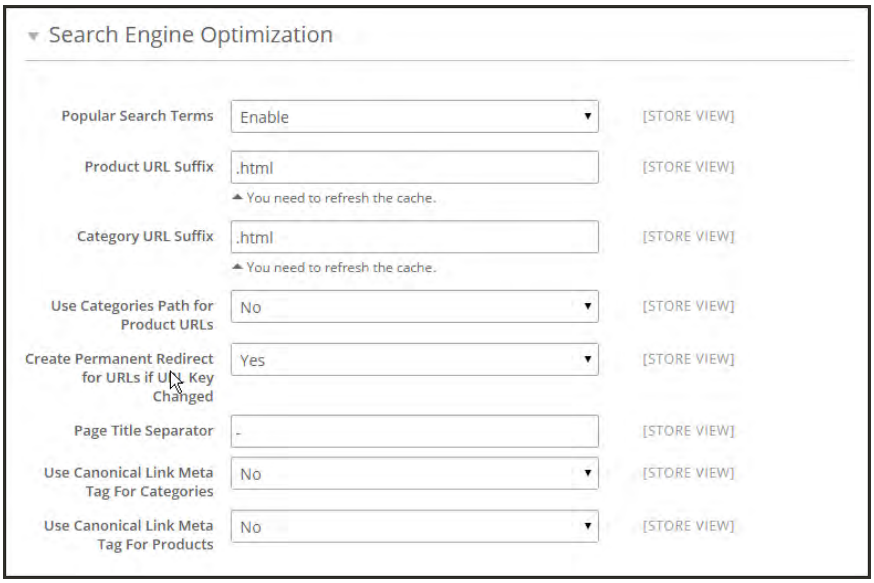
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Search Engine Optimizations** section, and do the following:
   a. Set **Product URL Suffix** to “html” or “htm.” Enter the suffix 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.

URL with Category Path

```
http://mystore.com/furniture/living-room/microfiber-sofa-sleeper
```

URL without Category Path

```
http://mystore.com/microfiber-sofa-sleeper
```



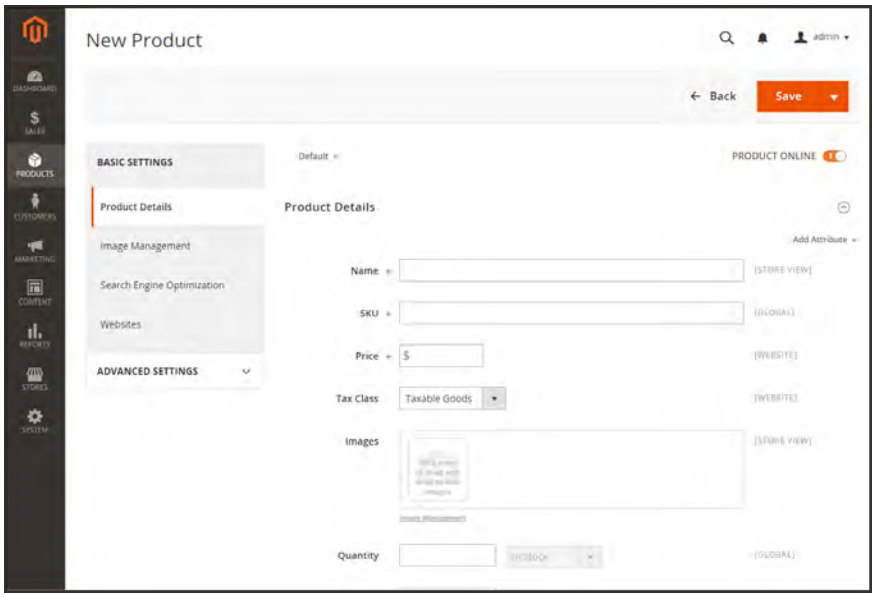
Search Engine Optimization

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

Refresh Cache

Product Workspace

The panel on the left of the product workspace lists the selection of Basic and Advanced Settings, with the current selection on the right. The workspace includes multiple Save options and gives you control over the online status of the product.



Product Workspace

Attribute Set

The name of the attribute set appears in the upper-left corner, and determines the fields that make up the product record. When creating a new product, an existing template can be chosen by clicking the down arrow next to the template name. The product template is also referred to as an attribute set.

Product Template Control

Save Menu

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

Save Menu

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

Online Status

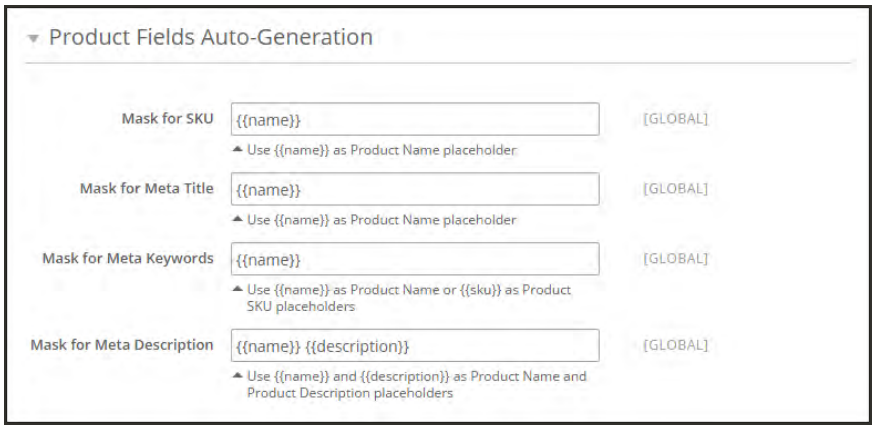
The online status of the product is indicated by the switch in the upper-right corner. To change the online status, simply click the switch.

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

Default Field Values

To save time when creating products, the default value of several product fields is based on placeholder values from another field. You can either accept the default value, or replace it with another. The following fields have autogenerated default values:

- SKU (based on product Name)
- Meta Title (based on product Name)
- Meta Keywords (based on product Name)
- Meta Description (based on product Name and Description)



Product Fields Auto-Generation

The placeholders represent the value of another field, and are enclosed in double-curly braces. Any product attribute code that is included in the product template 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.

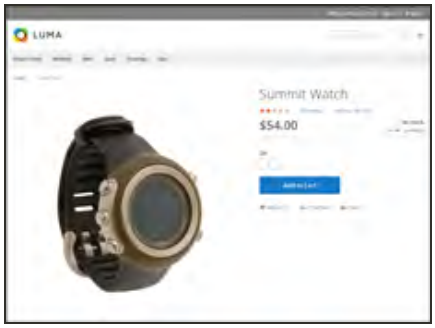
   > If you want to keep the existing placeholder values, be careful to preserve the double curly braces that enclose each markup tag.

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

Common Placeholders

PLACEHOLDER
{{color}}
{{country_of_manufacture}}
{{description}}
{{gender}}
{{material}}
{{name}}
{{short_description}}
{{size}}
{{sku}}

Product Types

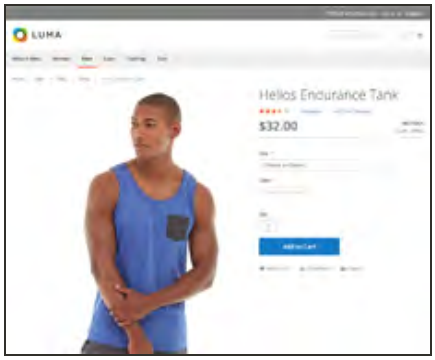


Simple Product

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.

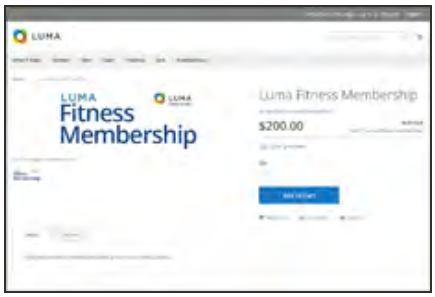
Grouped Product

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.



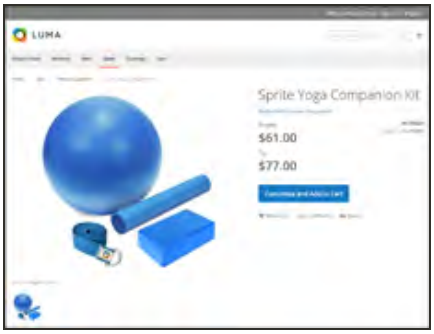
Configurable Product

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.



Virtual Product

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

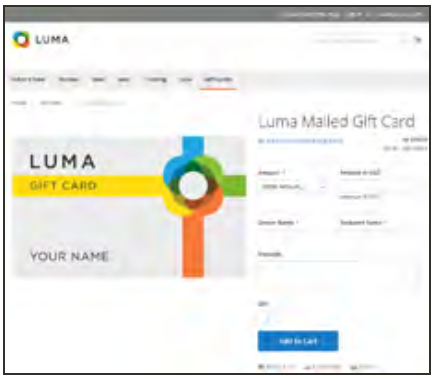


Bundle Product

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

Downloadable

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



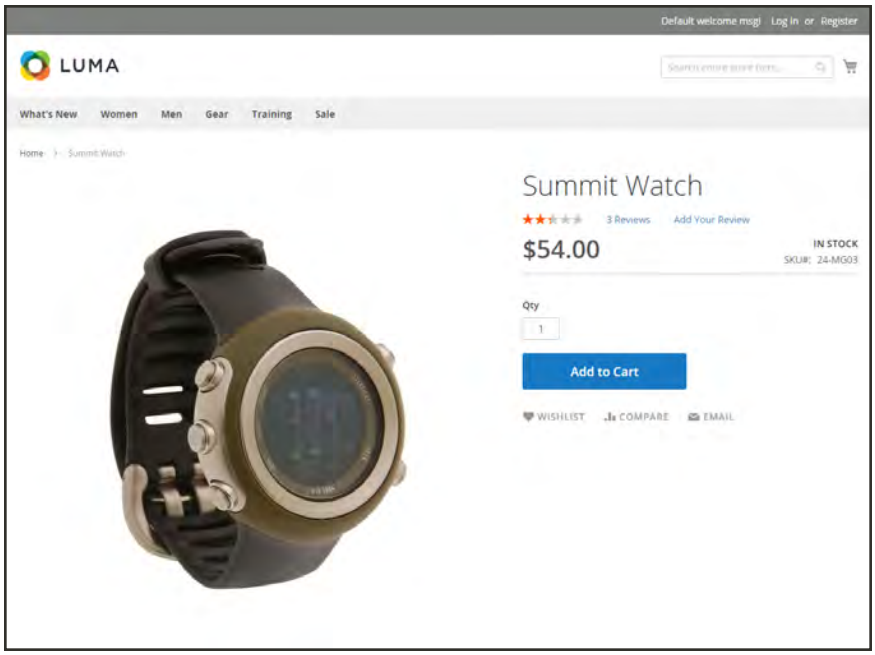
Gift Card

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

Simple Product

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

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



Simple Product

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set (Optional)

Step 3: Complete the Required Fields

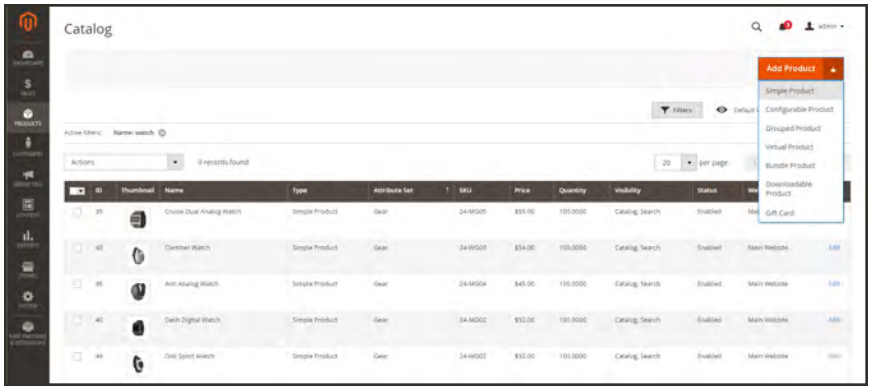
Step 4: Complete the Remaining Product Details

Step 5: Publish the Product

Step 6: View the Product in Your Store

Step 1: Choose the Product Type

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



Add Simple Product

Step 2: Choose the Attribute Set (Optional)

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 Fields

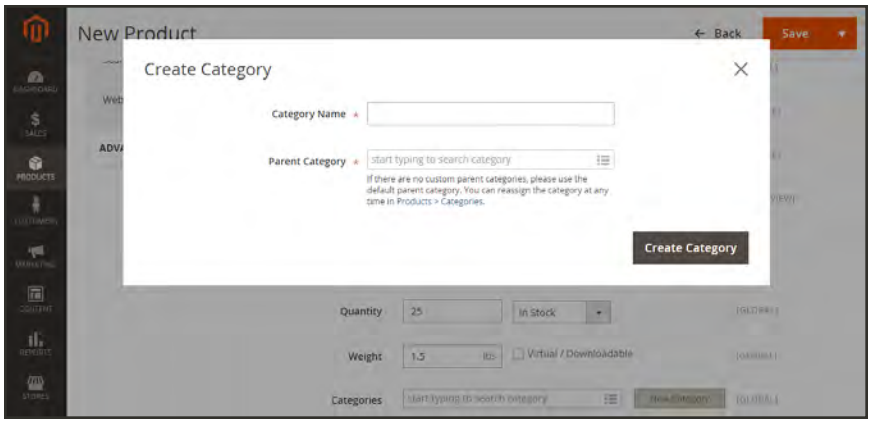
1. In the **Product Details** section. do the following:
   a. Enter the product **Name**.
   b. You can either use the default **SKU** that is based on the product name, or enter another.
   c. Enter the product **Price**.
2. Because the product is not yet ready to publish, set the **Product Online** switch to the "Off" position.
3. Tap **Save**, and continue with the next step.

   With the required fields complete, the product can be saved as needed.

Step 4: Complete the Remaining Product Details

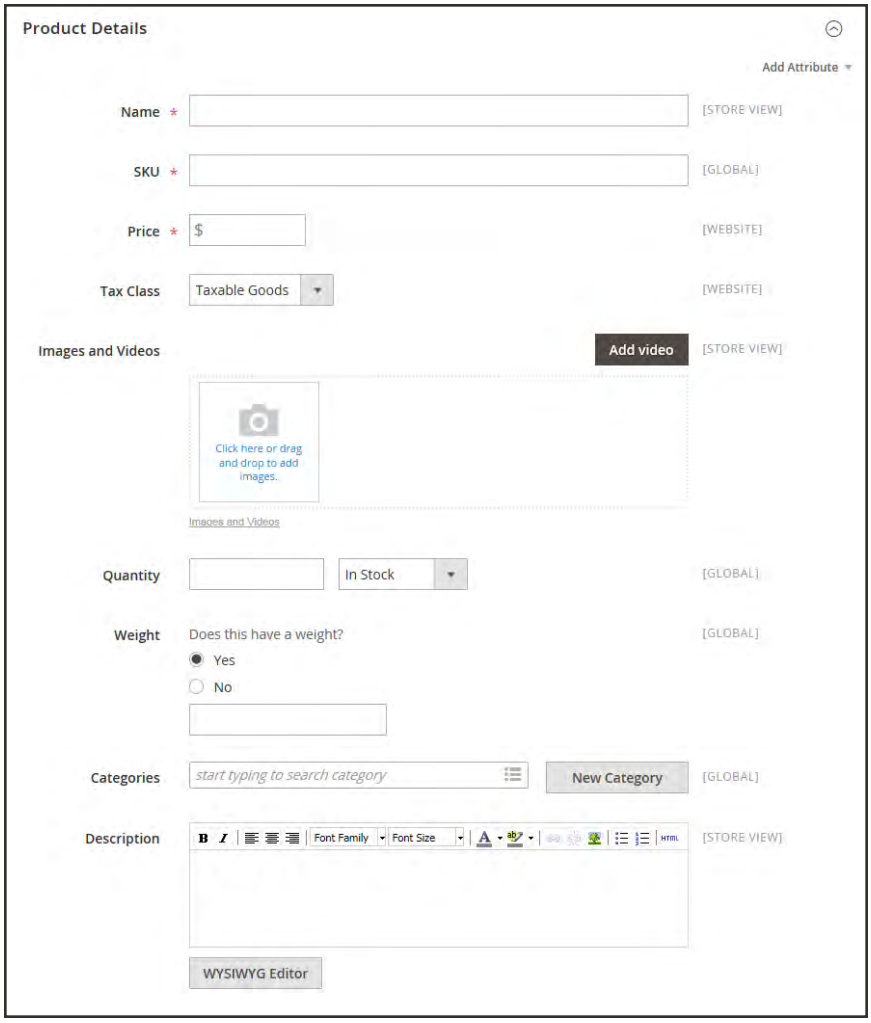
1. Set **Tax Class** to one of the following:
   - None
   - Taxable Goods
2. If you're ready to add a product image, do one of the following:
   - Drag an image from your desktop, and drop it on the **camera** tile in the Images and Videos box.
   - In the Images box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

   A placeholder appears until a product image is uploaded.
3. Enter the **Quantity** of the product that is currently in stock.
4. Enter the product **Weight**.
5. To assign the product to a **Category**, do one of the following:
   - Start typing to find a match. Then, choose the **Category**.
   - Tap **Show List** to see the category tree. Then, drill down and tap each category that you want to assign to the product.
   - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.



Create Category

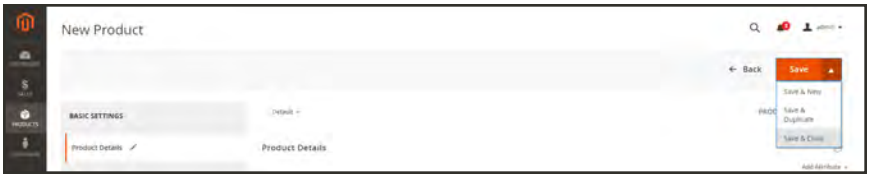
6. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, for additional control.



Product Details

Step 5: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Product Online** switch to the "On" position.
2. When complete, on the **Save** menu, choose **Save & Close**.



Save & Close

Step 6: View the Product in Your Store

In the upper-right corner on the **Admin** menu, choose **Customer View**.

Customer View

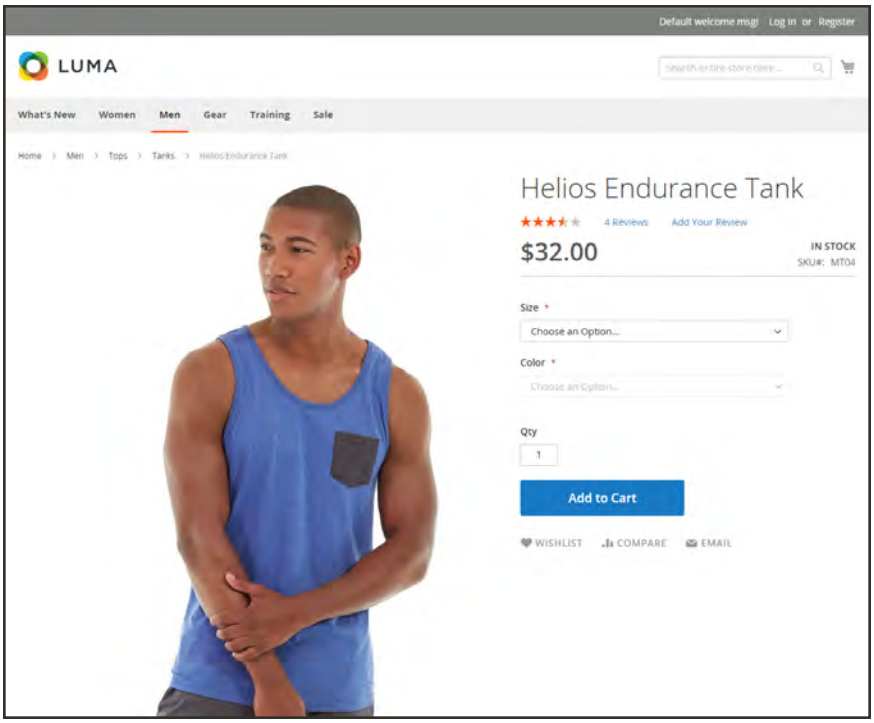
THINGS TO REMEMBER

- 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.

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.



Configurable Product

Process Overview:

Part I: Create Configurable Product

Step 1: Choose the Product Type

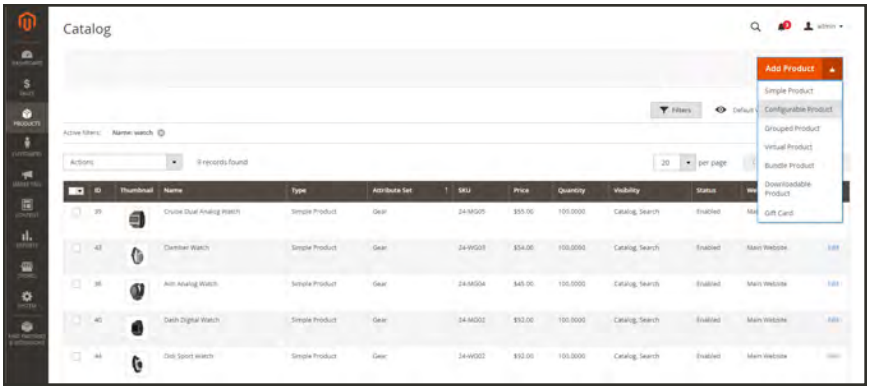
Step 3: Complete the Required Fields

Step 4: Complete the Remaining Product Details

Step 5: Save and Continue

Step 1: Choose the Product Type

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



Add Configurable Product

Step 2: Choose the Attribute Set

The attribute set determines the selection of fields that are used in the product. The field at the top of the page is initially set to the "Default" attribute set. For a configurable product, the attribute set must include at least one drop-down attribute. The attribute set used in this example has drop-down attributes for color and size.

To choose the attribute set that is used as a template 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.

Choose Template

Step 3: Complete the Required Fields

1. In the **Product Details** section, enter the product **Name**.
2. Either accept the default **SKU** that is based on the product name, or enter another value.
3. Enter the product **Price**.
4. If necessary, change the **Tax Class**. The default setting is "Taxable Goods."
5. Because the product is not yet ready to publish in your catalog, set the **Product Online** switch to the "Off" position.

Step 4: Complete the Remaining Product Details

1. (Optional) You can add an image that represents the configurable product as a whole, or wait until later when you set up the configurations. In this example, we use an image that shows the top in all three colors. An image uploaded here becomes the image of the "parent product."

   - Drag an image from your desktop, and drop it on the **camera** tile in the Images and Videos box.
   - In the box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

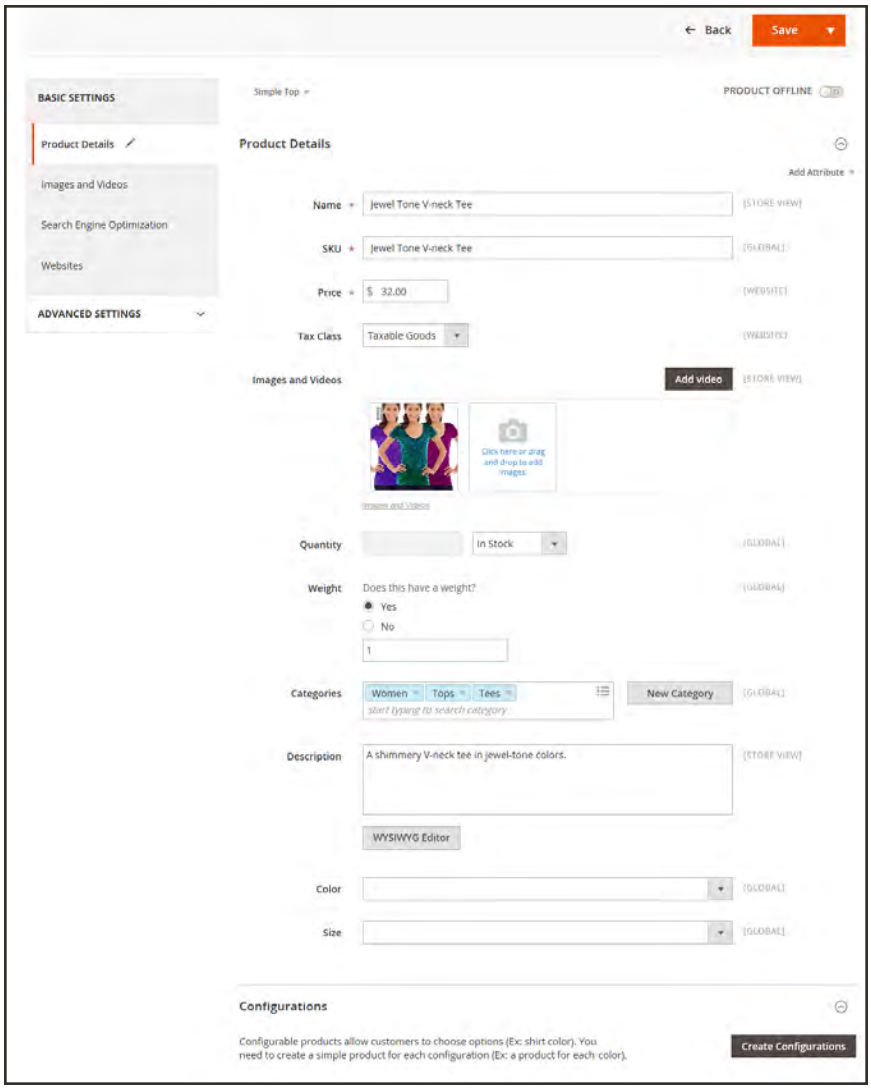
   A placeholder appears until an image is uploaded. If you prefer, you can later add video to the gallery.

2. The **Quantity** field is not available because it's determined by each product variation.

3. To assign the product to a **Category**, do one of the following:

   - Start typing to find a match. Then, choose the **Category**.
   - Tap the **Show List** icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
   - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.

4. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor** for additional control.



Product Details

Step 5: Save and Continue

This is a good time to save your work. In the next step, you'll set up the configurations for each variation of the product.

1. In the upper-right corner, tap **Save**.
2. Continue with Adding Configurations.

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

Progress Bar

Process Overview:

Part II: Add Configurations

Step 1: Choose the Attributes

Step 2: Enter the Attribute Values

Step 3: Configure the Images, Price, and Quantity

Step 4: Generate the Product Configurations

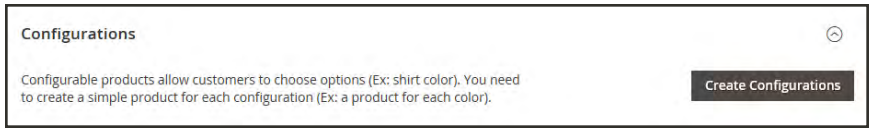
Step 5: Publish the Products

Step 6: Configure the Shopping Cart Thumbnails (Optional)

Step 7: View the Products in Your Store

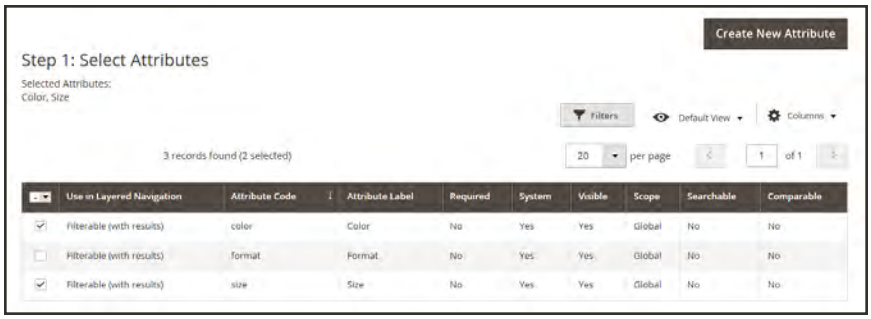
Step 1: Choose the Attributes

1. At the bottom of Product Details, expand the **Configurations** section. Tap **Create Configurations**.



Configurations

2. Mark the checkbox of each attribute that is to be used as a configuration.
3. If you need to add a new attribute, tap **Create New Attribute**. Complete the attribute properties, and tap **Save Attribute**. Then, mark the checkbox to select the attribute.
4. In the upper-right corner, tap **Next**.



Select Attributes

Step 2: Enter the Attribute Values

1. Mark the checkbox of each variation of the product.
2. To add a new value, click **Create New Value**. Then, enter the new value in the input box, and tap the **Enter** arrow.
3. Repeat these steps for each attribute that is included as a configuration.

   You can rearrange the list of attributes by dragging the box in the upper-left corner to a new position.
4. In the upper-right corner, tap **Next**.

Step 3: Configure the Images, Price, and Quantity

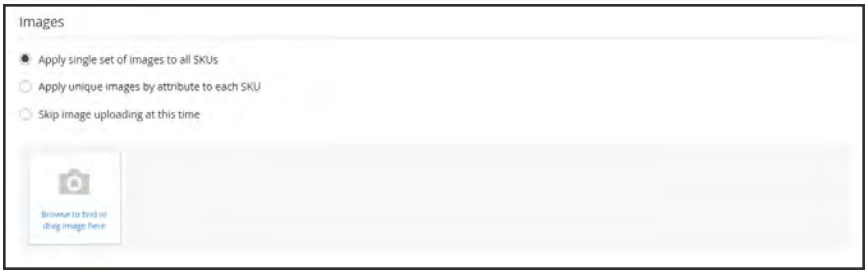
This step determines the images, pricing and quantity of each configuration. The available options are the same for each, and you can choose only one. You can apply the same setting to all SKUs, apply a unique setting to each SKU, or skip the settings for now.

1. Choose the configuration options that apply.

Configure the Images

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

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



Use Same Images for All SKUs

Method 2: Apply Unique Images for Each SKU

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

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

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

Unique Images per SKU

Configure the Prices

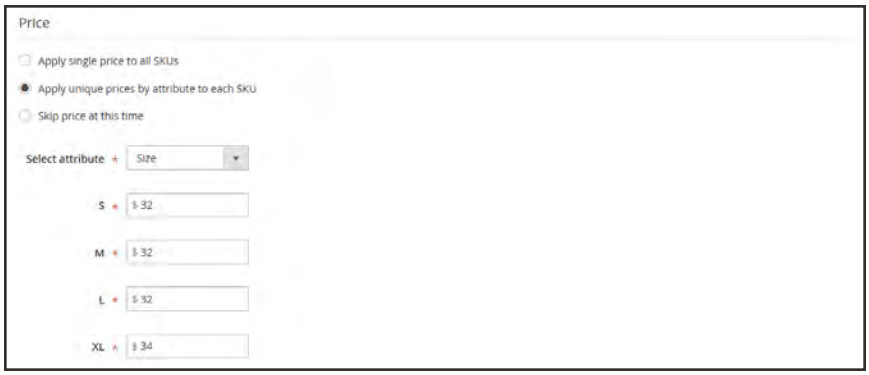
Method 1: Apply the Same Price to All SKUs

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

Same Price per SKU

Method 2: Apply a Different Price for Each SKU

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



Unique Price per SKU

Configure the Quantity

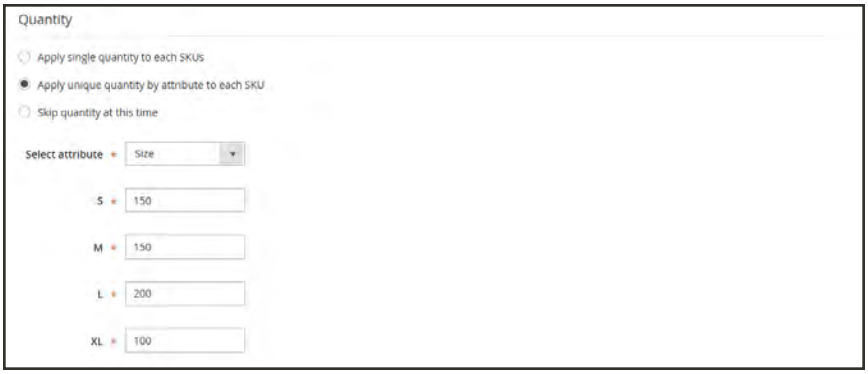
Method 1: Apply the Same Quantity to All SKUs

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

Same Quantity for All SKUs

Method 2: Apply Different Quantity by Attribute

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



Different Quantities per Attribute

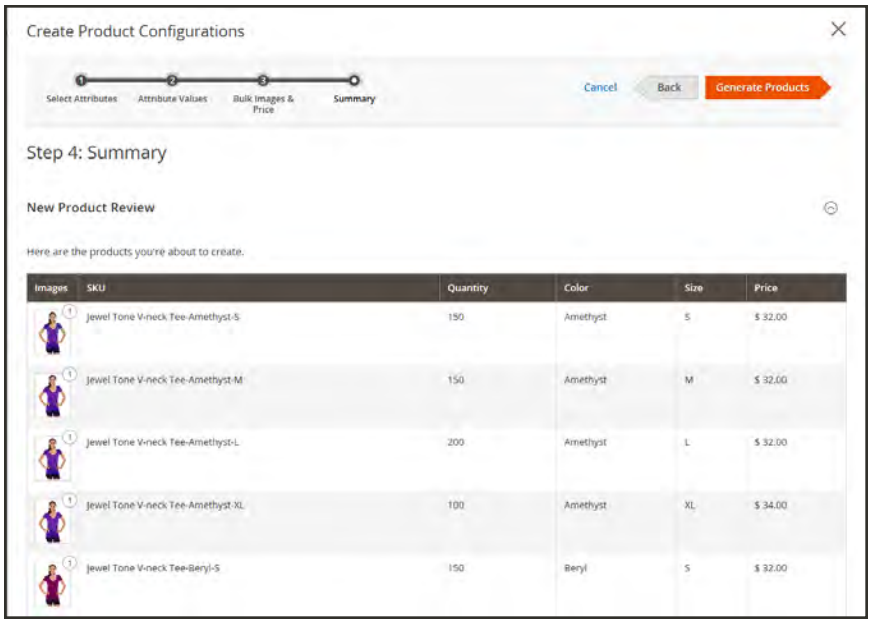
2. When complete, tap **Next** in the upper-right corner.

Step 4: Generate the Product Configurations

1. Wait a moment for the list of products to appear. When you are ready to add the products to your catalog, tap **Generate Products**.

   The product variations now appear at the bottom of Product Details in the Configuration section.

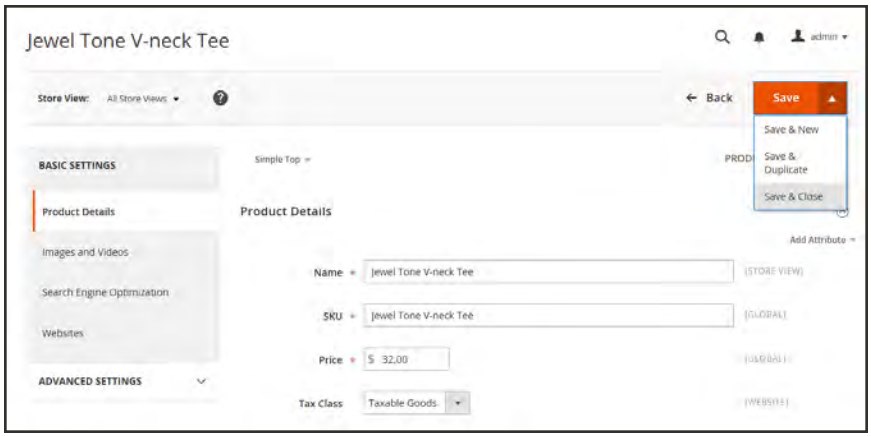
2. If you want to edit any of the settings, tap **Edit Configurations**.



Generate Products

Step 5: Publish the Product

1. If you are ready to publish the products in the catalog, set the **Product Online** switch to the "On" position. Otherwise, leave the switch in the "Off" position until the product is ready to publish.
2. When complete, on the **Save** menu, choose **Save & Close**.



Save & Close

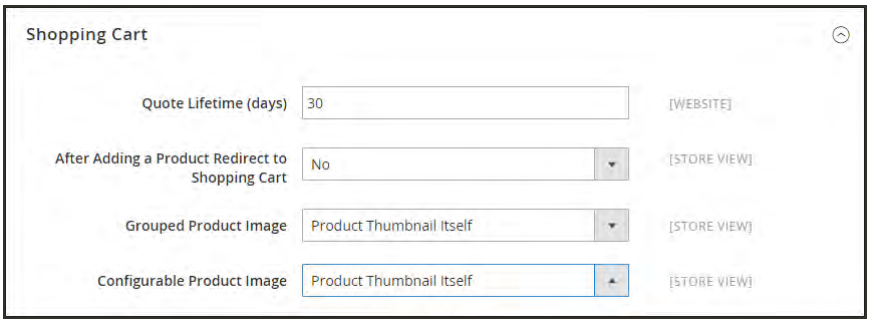
3. When prompted to refresh the cache, tap the **Cache Management** link in the system message, and refresh the invalid cache.

4. On the Admin sidebar, tap **Products**. Your new configurable product and its variations appears in the grid at the top of the list.

Step 6: Configure the Shopping Cart Thumbnails (Optional)

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

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



Shopping Cart - Configurable Product Image

Step 7: View the Product in Your Store

When the product is online, tap the **Admin** arrow in the upper-right corner, and choose **Customer View** to see how they look in your store.

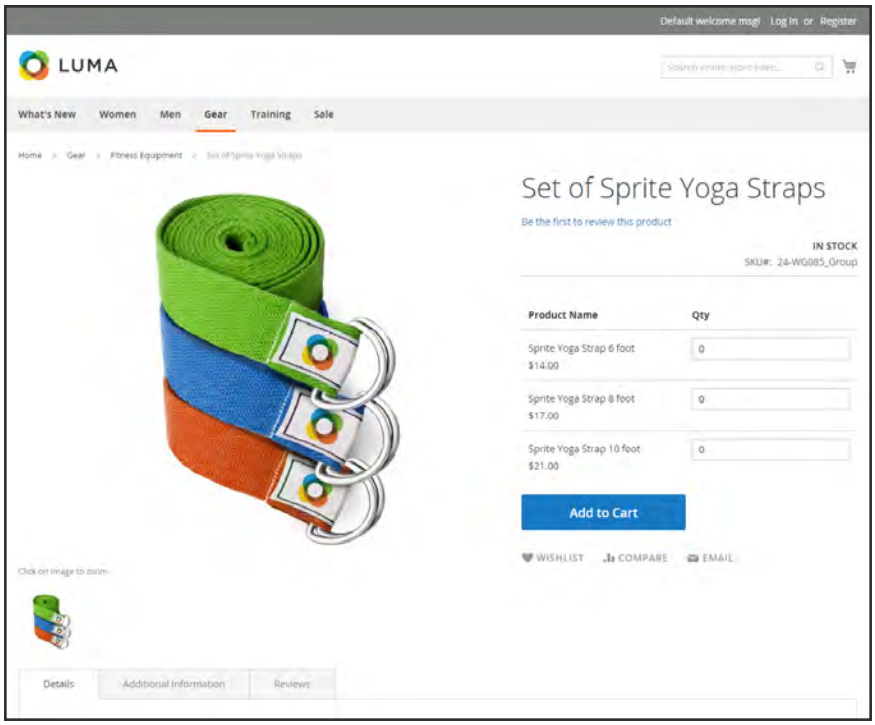
Customer View

THINGS TO REMEMBER

- A configurable product allows the shopper to choose options from drop-down lists. Each option is actually a separate, simple product.
- Each drop-down list values is based on an attribute of the “Dropdown” input type. The drop-down attributes must be included in the attribute set, which is then used as a template for the configurable product.
- The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the product variation.

Grouped Product

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



Grouped Product

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set (Optional)

Step 3: Complete the Required Fields

Step 4: Complete the Remaining Product Details

Step 5: Add the Grouped Products

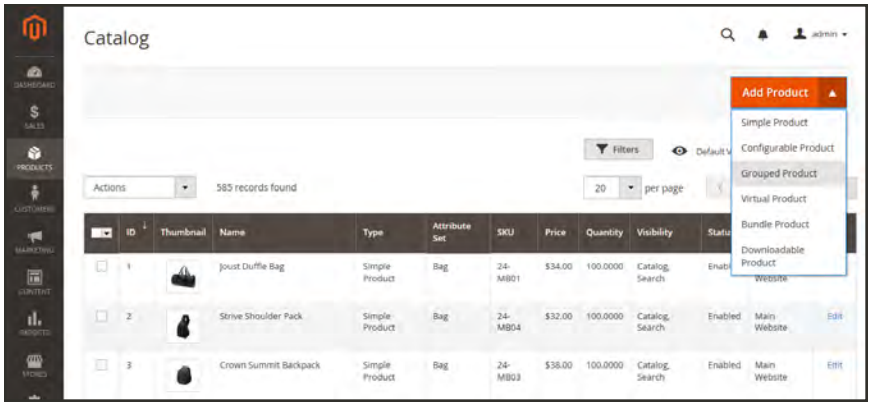
Step 6: Publish the Product

Step 7: Configure the Shopping Cart Thumbnails (Optional)

Step 8: View the Product in Your Store

Step 1: Choose the Product Type

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



Add Grouped Product

Step 2: Choose the Attribute Set (Optional)

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 Fields

1. In the **Product Details** section, do the following:
   a. Enter the product **Name**.
   b. Either accept the default **SKU** that is based on the product name, or enter another value.
2. Because the product is not yet ready to publish, set the **Product Online** switch to the "Off" position.

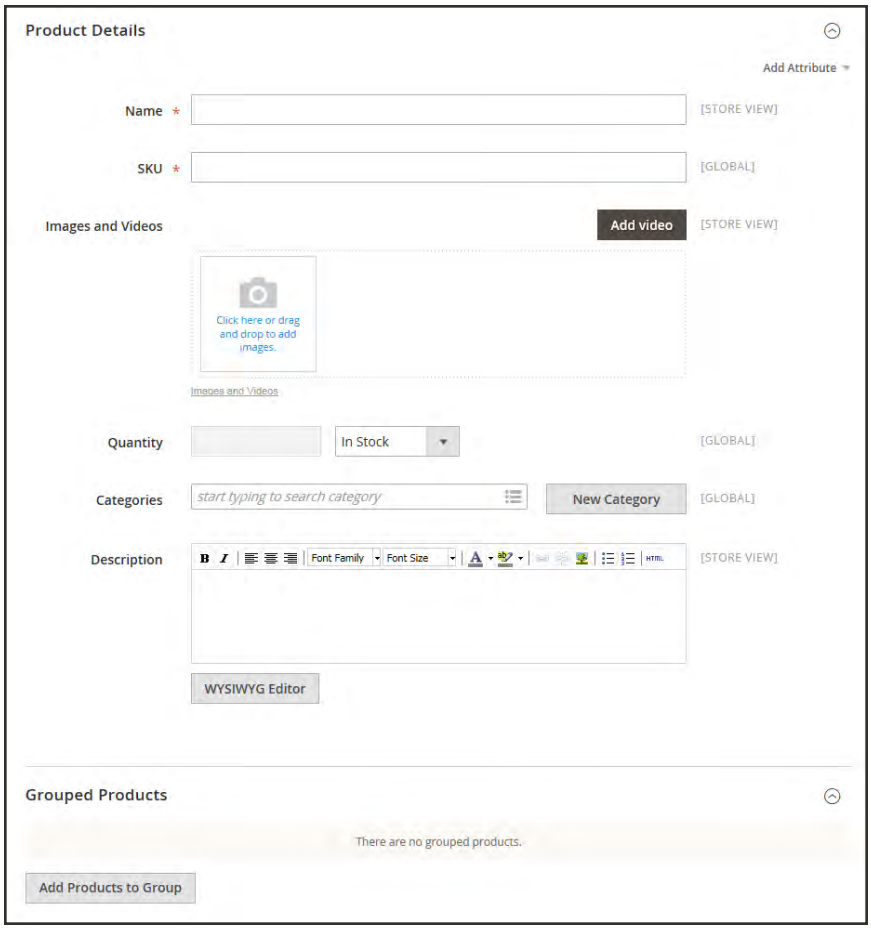
Step 4: Complete the Remaining Product Details

1. To add an image that represents the product group, do one of the following:
   - Drag an image from your desktop, and drop it on the **camera** tile in the Images and Videos box.
   - In the Images and Videos box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

   A placeholder appears until a product image is uploaded.
2. The **Quantity** is grayed out because it's derived from the individual products that make up the group.
3. To assign the product to a **Category**, do one of the following:
   - Start typing to find a match. Then, choose the **Category**.
   - Tap the **Show List** icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
   - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.

Choose Categories

4. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, to format the text. To learn more, see: Using the Editor.

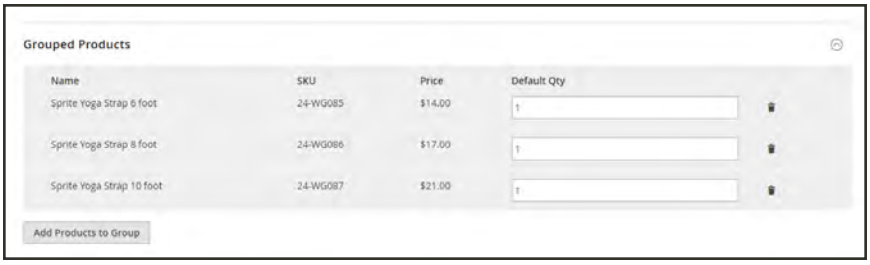


Product Details

Step 5: Add the Grouped Products

1. At the bottom of the page, expand the **Grouped Products** section. Then, tap **Add Products to Group**.
2. In the grid, use the filters at the top of the columns to find the products that you want to include in the group. Then, tap **Search**.
3. In the list, mark the checkbox of each item that you want to include in the group.

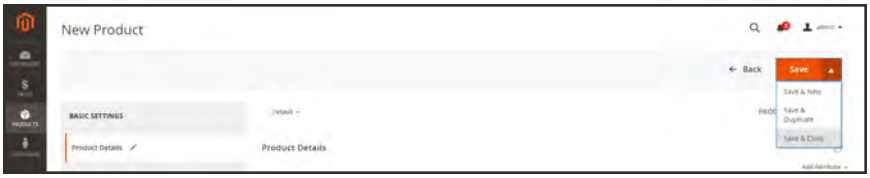
4. Tap **Add Selected Products** to add them to the grouped product. Then, do any of the following:
   - To specify a default quantity for any of the items, enter the number in the **Default Qty** field.
   - To remove any product from the list, tap the **Delete** icon.



Products Added

Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Product Online** switch to the "On" position.
2. When complete, on the **Save** menu, choose **Save & Close**.

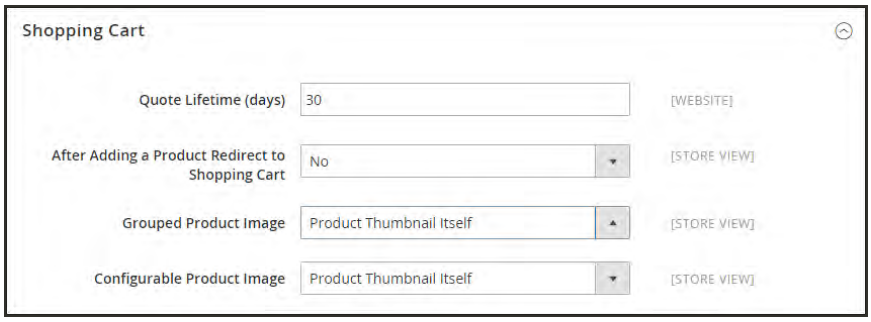


Save & Close

Step 7: Configure the Shopping Cart Thumbnails (Optional)

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

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



Shopping Cart

Step 8: View the Product in Your Store

On the Admin menu , choose **Customer View**.

Customer View

THINGS TO REMEMBER

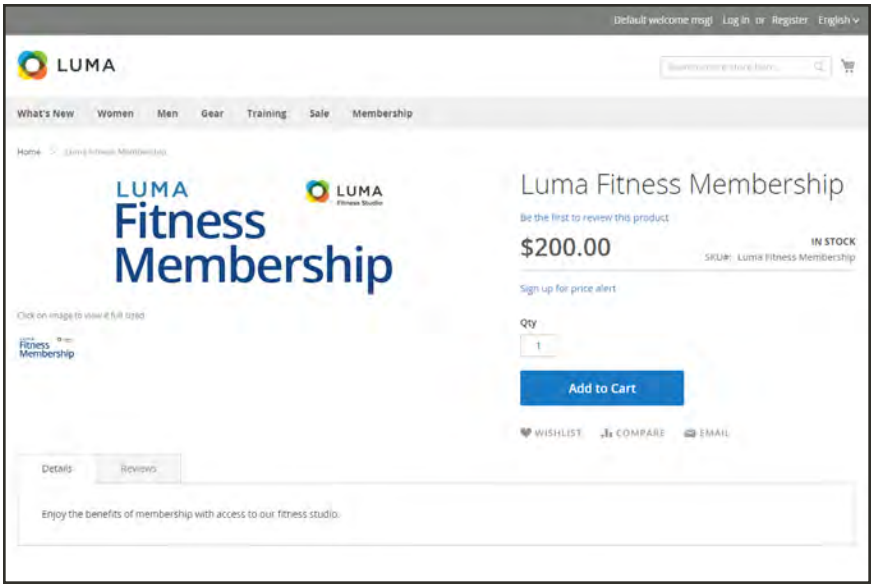
- A grouped product is essentially a collection of simple associated products.
- Simple and virtual products that are part of a grouped product cannot have custom options.
- Each item purchased appears individually in the shopping cart, rather than as part of the group.
- The thumbnail image in the shopping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

Virtual Product

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

- Grouped Product
- Bundle Product

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



Virtual Product

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set (Optional)

Step 3: Complete the Required Fields

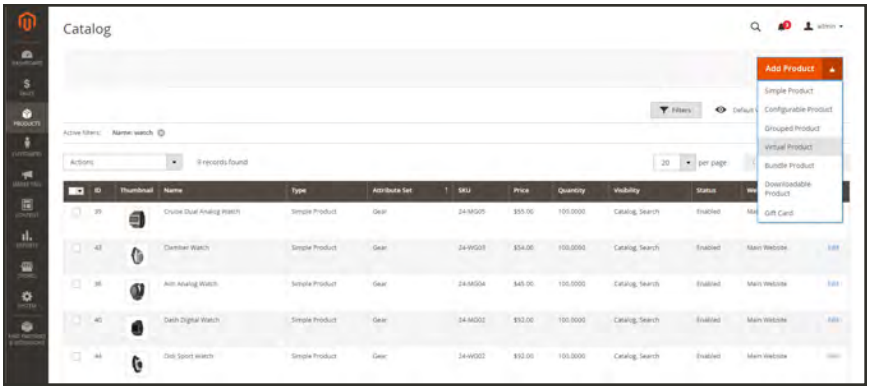
Step 4: Complete the Remaining Product Details

Step 5: Publish the Product

Step 6: View the Product in Your Store

Step 1: Choose the Product Type

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



Add Virtual Product

Step 2: Choose the Attribute Set (Optional)

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 Fields

1. In the **Product Details** section. do the following:
   a. Enter the product **Name**.
   b. Either accept the default **SKU** that is based on the product name, or enter another value.
   c. Enter the product **Price**.
2. Because the product is not yet ready to publish, set the **Product Online** switch to the "Off" position.
3. Tap **Save** and continue with the next step.

   With the required fields complete, the product can be saved as needed.

Step 4: Complete the Remaining Product Details

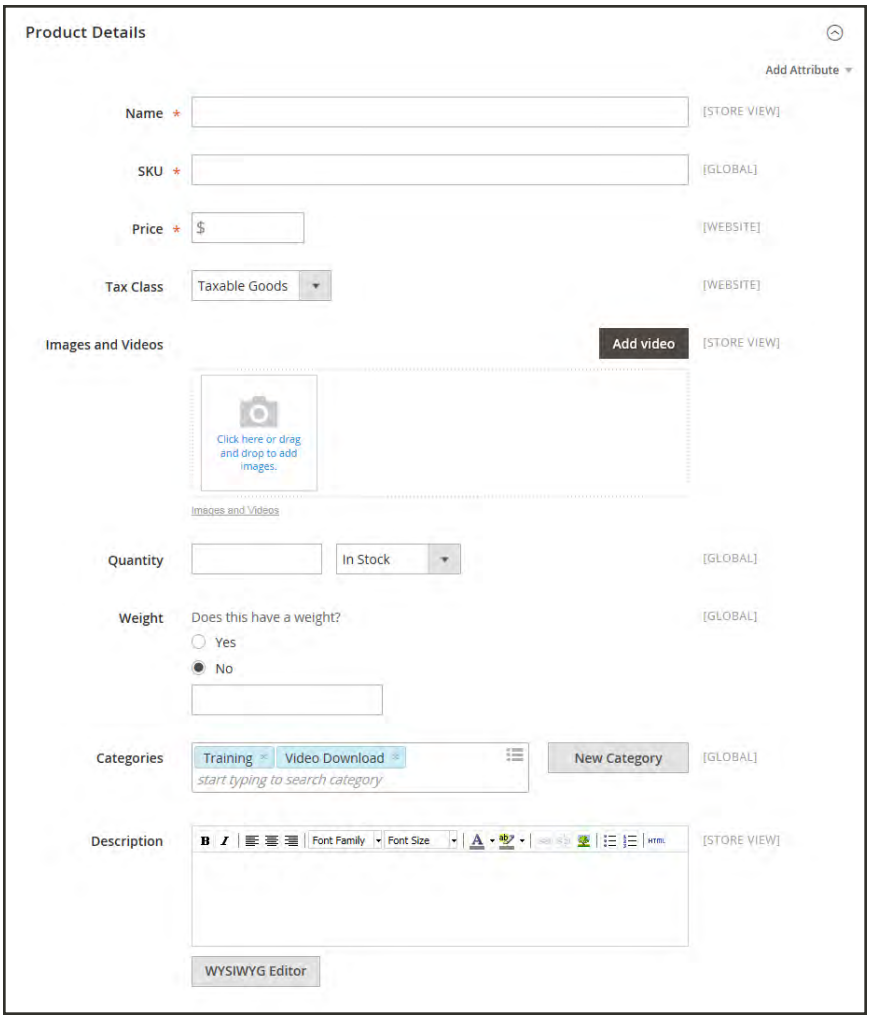
1. Set **Tax Class** to one of the following:
   - None
   - Taxable Goods

   To learn about requirements for the taxation of digital goods and services, see the white paper, Identification & Taxability of Digital Products on the Avalara site.
2. If you're ready to add Images, do one of the following:
   - Drag an image from your desktop, and drop it on the **camera** tile in the Images and Video box.
   - In the Images and Video box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

   A placeholder appears until a product image is uploaded.
3. If applicable, enter the **Quantity** of the product that is currently available.
4. To assign the product to a **Category**, do one of the following:
   - Start typing to find a match. Then, choose the **Category**.
   - Tap the Show List icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
   - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.

Choose Category

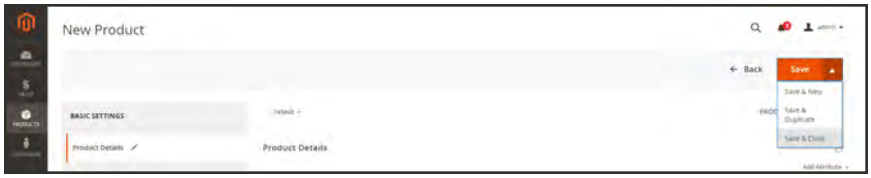
5. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, for additional control.



Product Details

Step 5: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Product Online** switch to the "On" position.
2. When complete, on the **Save** menu, choose **Save & Close**.



Save & Close

Step 6: View the Product in Your Store

On the **Admin** menu, choose **Customer View**.

Customer View

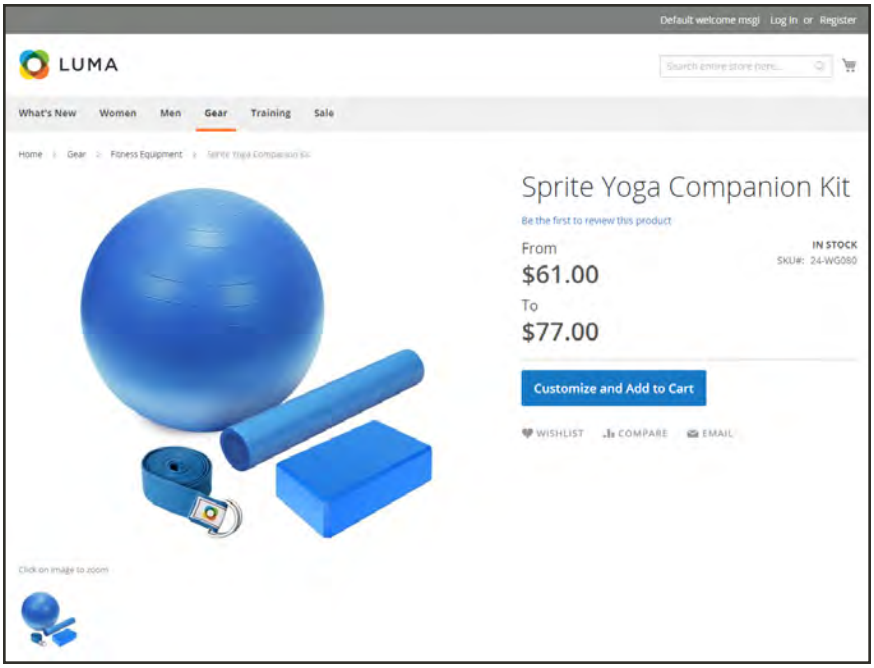
THINGS TO REMEMBER

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

Bundle Product

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

- Simple Product
- Virtual Product

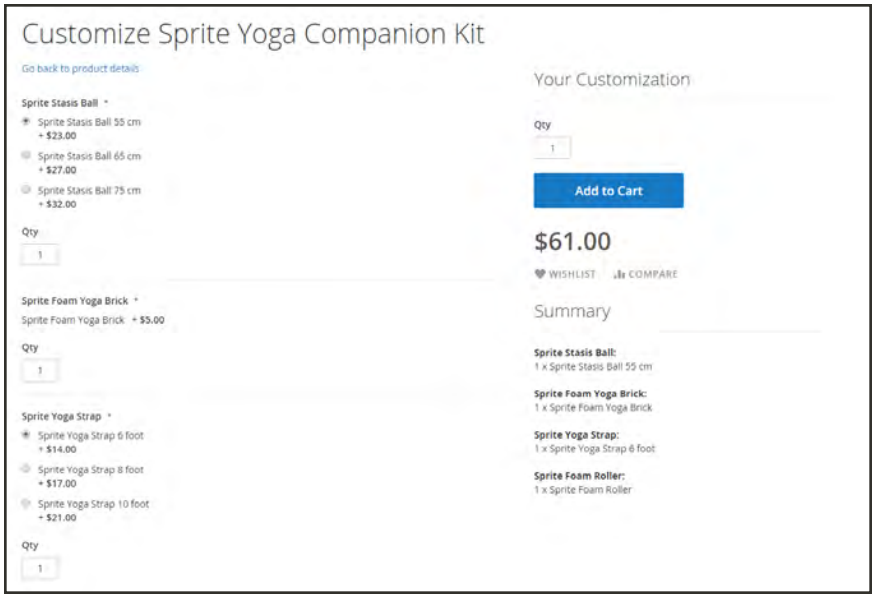


Bundle Product

Customizing the Bundle

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

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



Customize Bundle

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

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set (Optional)

Step 3: Complete the Required Fields

Step 4: Complete the Remaining Product Details

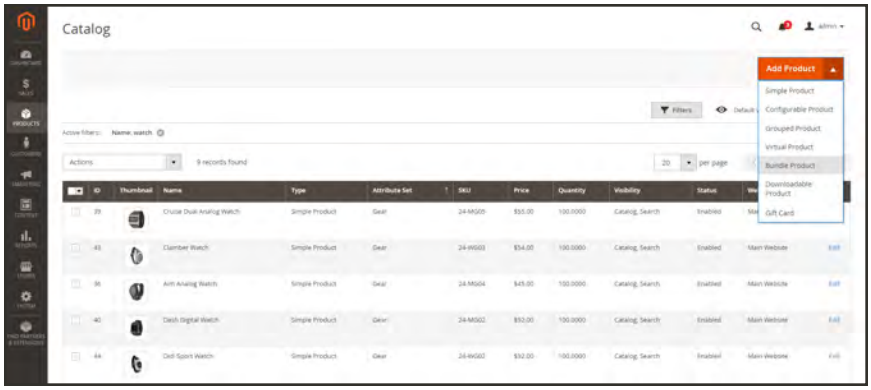
Step 5: Add the Bundle Items

Step 6: Publish the Product

Step 7: View the Product in Your Store

Step 1: Choose the Product Type

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



Add Bundle Product

Step 2: Choose the Attribute Set (Optional)

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

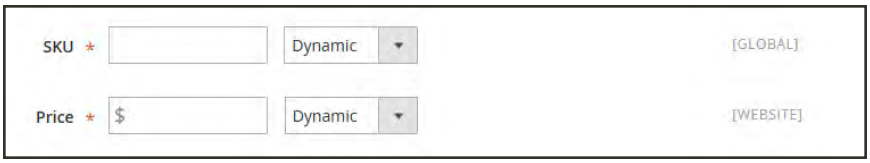
- In the **Search** box, enter the name of the attribute set,
- In the list, choose the attribute set that you want to use.

The form is updated to reflect the change.

Choose Template

Step 3: Complete the Required Fields

1. In the **Product Details** section. do the following:
   a. Enter the product **Name**.
   b. Either accept the default **SKU** that is based on the product name, or enter a different value. Then set the type of value to one of the following:
      - Dynamic
      - Fixed
   c. To set the product **Price**, do the following:
      - If you want the price to change according to the options selected, leave **Price** blank, and choose "Dynamic."
      - To have a set price for the bundle, choose "Fixed," and enter the **Price**.



Dynamic or Fixed SKU and Price

2. Because the product is not yet ready to publish, set the **Product Online** switch to the "Off" position.
3. Tap **Save** and continue with the next step.

   Now that the required fields are complete, the product can be saved whenever needed.

Step 4: Complete the Remaining Product Details

1. If the product is set to Fixed Pricing, set **Tax Class** to one of the following:
   - None
   - Taxable Goods
2. 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 in the Images and Videos box.
   - In the Images adn Videos box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

   A placeholder appears until a product image is uploaded.

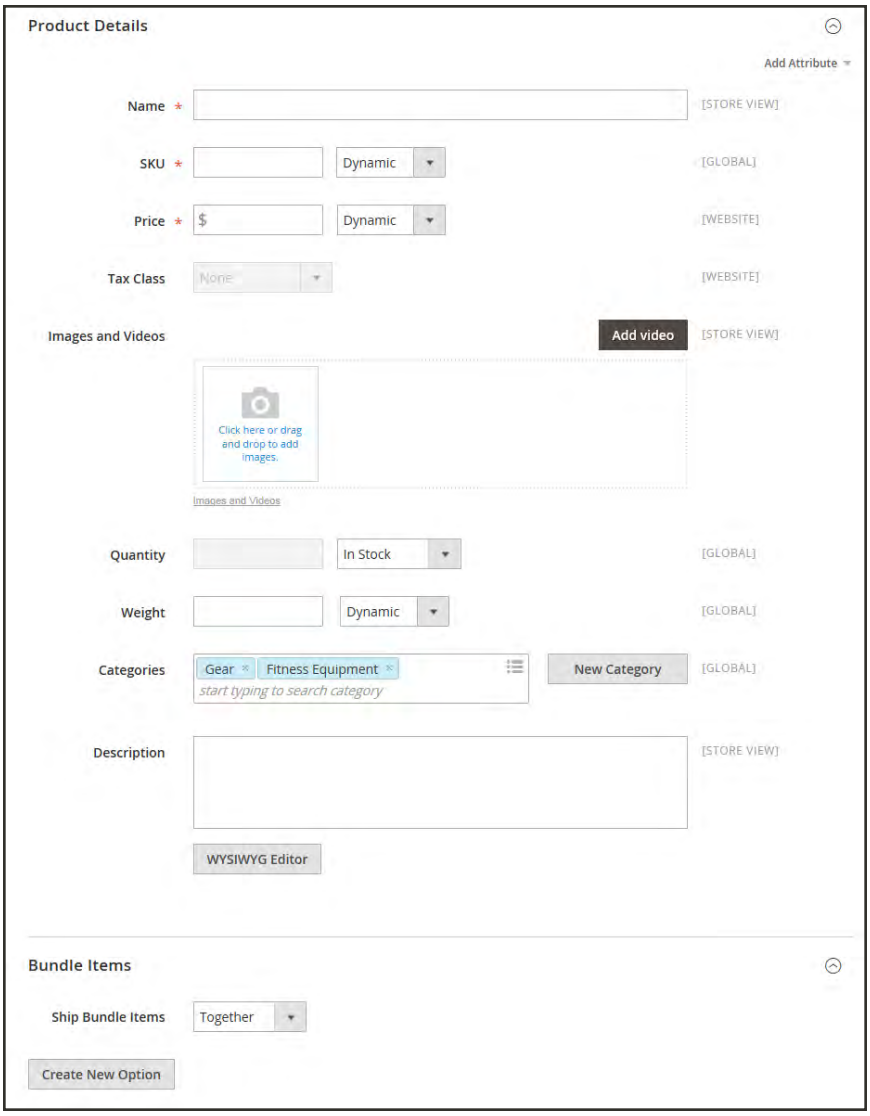
3. The **Quantity** field is grayed out because the value is determined by each item in the bundle.
4. To choose how **Weight** is determined for shipping, do one of the following:
   - If you want the weight to change according to the options included, choose “Dynamic.”
   - For a set product weight, choose “Fixed,” and enter the **Weight**.

Dynamic or Fixed Weight

5. To assign the product to a **Category**, do one of the following:
   - Start typing to find a match. Then, choose the **Category**.
   - Tap the **Show List** icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
   - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.

Categories

6. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, for additional control.



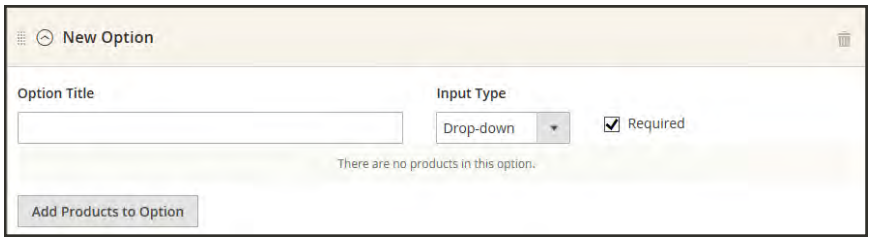
Bundle Details

Step 5: Add the Bundle Items

1. In the Bundle Items section, set **Ship Bundle Items** to one of the following:
   - Separately
   - Together
2. Tap **Create New Option**, Then, do the following:
   a. Enter an **Option Title** to be used field label.
   b. Set **Input Type** to one of the following:

- Drop-down
- Radio buttons
- Checkbox
- Multiple Select

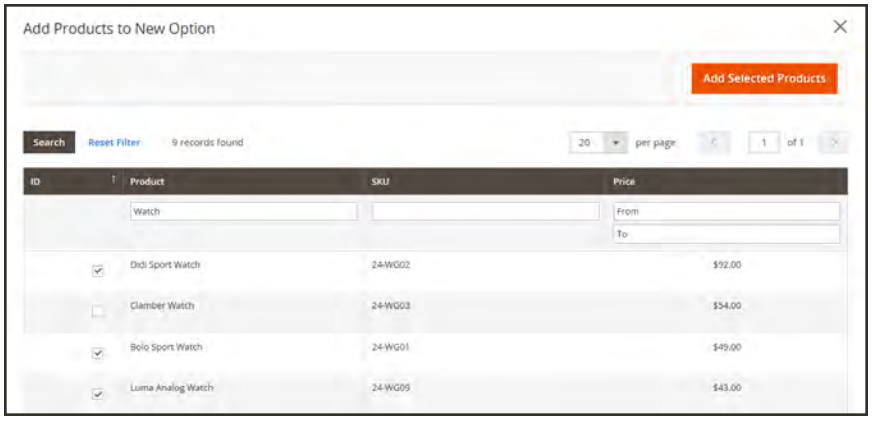
c. To make the field a required entry, mark the **Required** checkbox.



New Option

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**.



Add Selected Products

f. Choose one item 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.

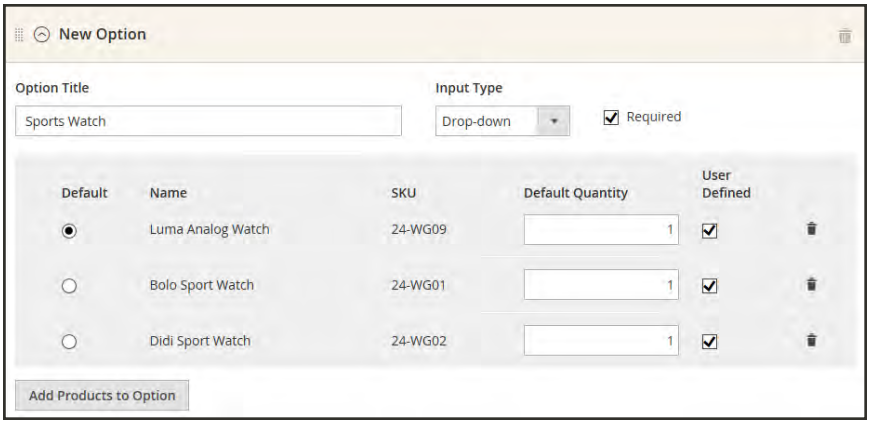
h. To prevent customers from changing the quantity of any item, clear the **User Defined** checkbox of any item that you do not want changed. By default, the quantity of all items can be changed.

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** icon.

5. Repeat these steps to add as many options as needed in the bundle.

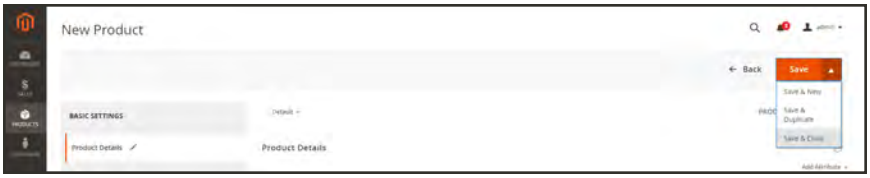
6. When complete, tap **Save**.



Option Items

Step 6: Publish the Product

1. If you are ready to publish the product in the catalog, set the **Product Online** switch to the "On" position.
2. On the **Save** menu, choose **Save & Close**.



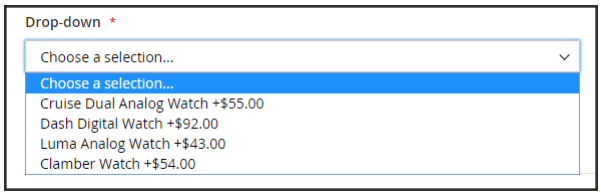
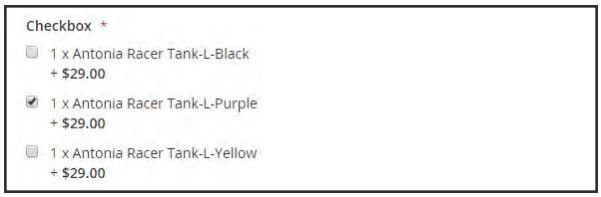
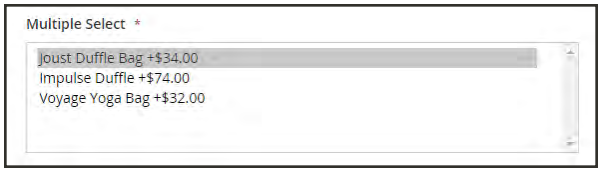
Save & Close

Step 7: View the Product in Your Store

On the **Admin** menu, choose **Customer View**.

Customer View

Input Controls

CONTROL	DESCRIPTION
Drop-down	Displays a drop-down list of options with the product name and price. Only one item can be selected. 
Radio Buttons	Displays a radio button for each option, followed by the product name and price. Only one item can be selected. 
Checkbox	Displays a checkbox for each option, followed by the product name and price. Multiple items can be selected. 
Multiple Select	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. 

Field Descriptions

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

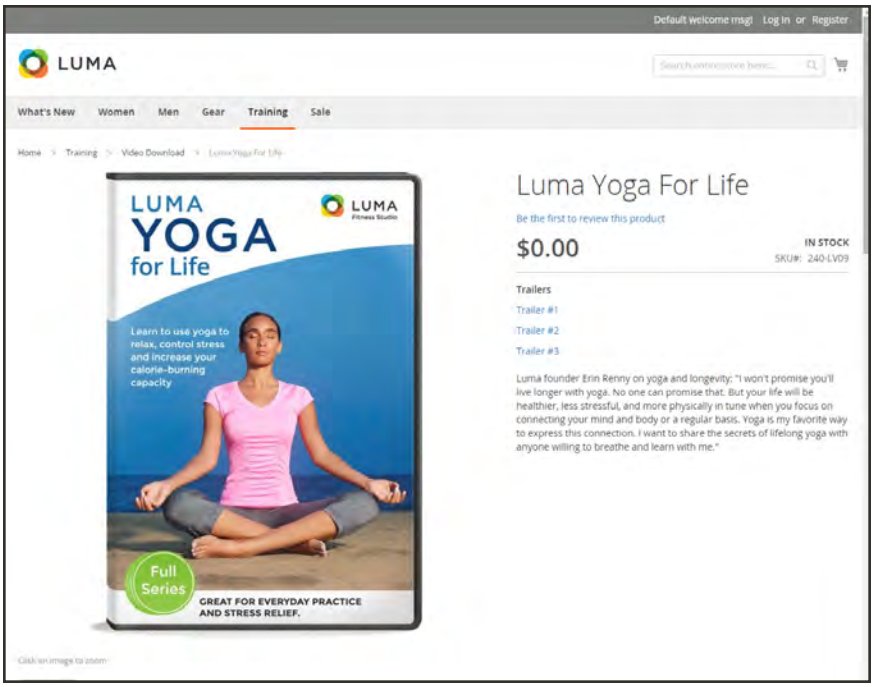
THINGS TO REMEMBER

- Customers can “build their own” bundle product.
- Bundle items can be simple or virtual products without custom options.
- The Price View can be set to a price range or to “As Low As.”
- SKU and Weight can be either “Fixed” or “Dynamic.”
- The Quantity can be a preset or user-defined value.
- Bundle items can be shipped together or separately.

Downloadable Product

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

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



Downloadable Product

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

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

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Required Fields

Step 4: Complete the Remaining Product Details

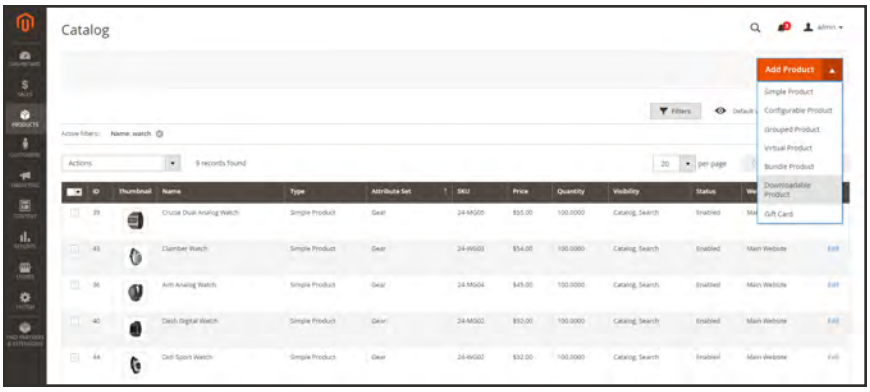
Step 5: Complete the Downloadable Information

Step 6: Publish the Product

Step 7: View the Product in Your Store

Step 1: Choose the Product Type

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



Add Downloadable Product

Step 2: Choose the Attribute Set (Optional)

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

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

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

The form is updated to reflect the change.

Choose Template

Step 3: Complete the Required Fields

1. In the **Product Details** section. do the following:
   a. Enter the product **Name**.
   b. Either accept the default **SKU** that is based on the product name, or enter another value.
   c. Enter the product **Price**.
2. Because the product is not yet ready to publish, set the **Product Online** switch to the "Off" position.
3. Tap **Save** and continue with the next step.

   With the required fields complete, the product can be saved as needed.

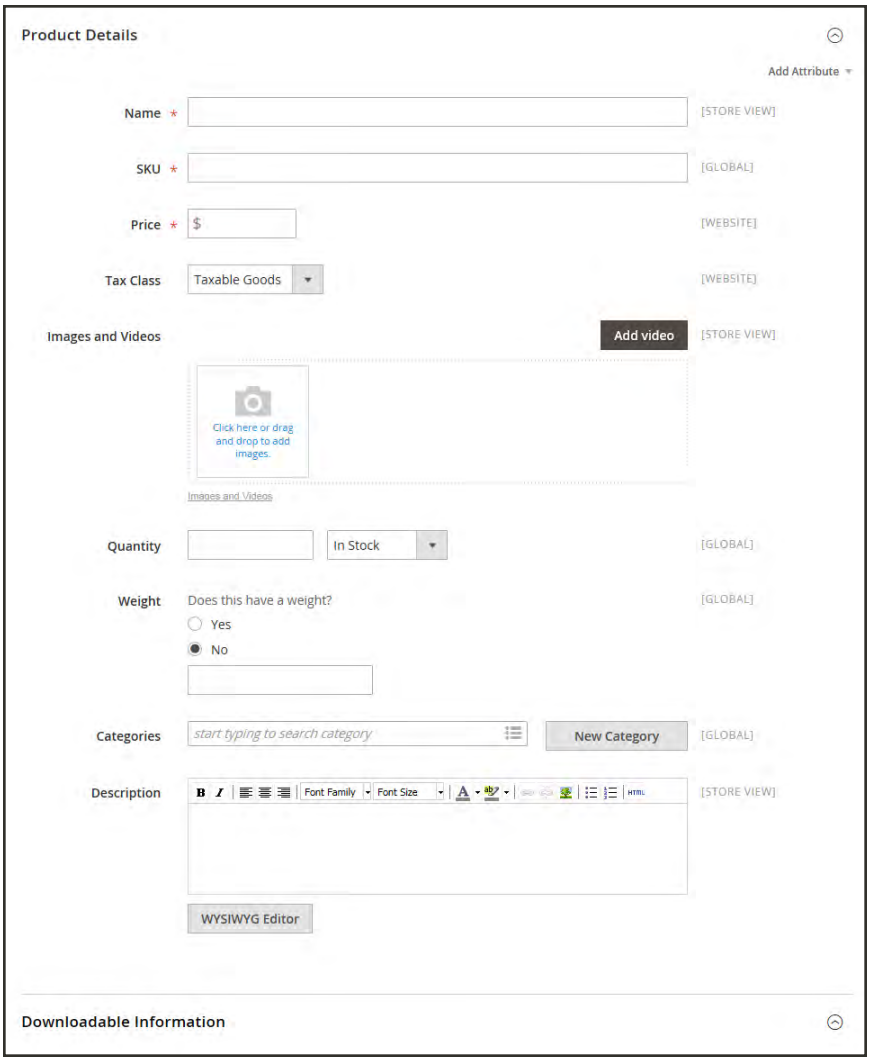
Step 4: Complete the Remaining Product Details

1. Set **Tax Class** to one of the following:
   - None
   - Taxable Goods

   To learn about requirements for the taxation of digital goods and services, see the white paper, Identification & Taxability of Digital Products on the Avalara site.
2. 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 in the Images and Videos box.
   - In the Images and Videos box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

   A placeholder appears until a product image is uploaded.

3. If applicable, enter the **Quantity** of the product that is currently available for download.
4. Skip the **Weight** field, and mark the **Virtual / Downloadable** checkbox, if necessary.



Product Details

5. To assign the product to a **Category**, do one of the following:
   - Start typing to find a match. Then, choose the **Category**.
   - Tap the Show List icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
   - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.

Choose Category

6. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, for additional control.

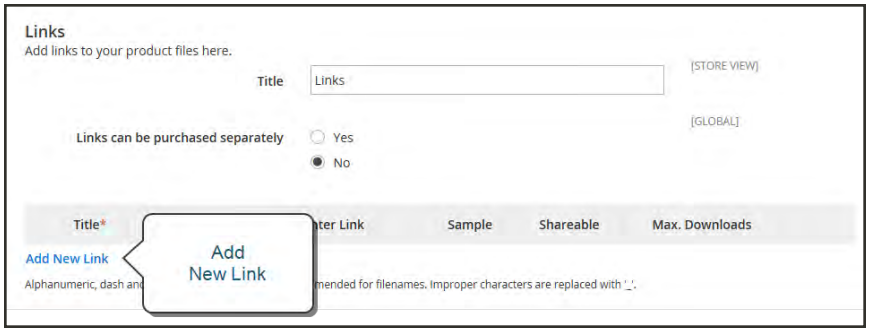
Step 5: Complete the Downloadable Information

The Downloadable Information is divided into two sections. The first section describes each download link, and thesecond section describes each sample file. The default value for many of these options can be set in the configuration.

Complete the Links

1. In the **Links** section, enter the **Title** that you want to use as a heading for the download links.
2. Set **Links can be purchased separately** to one of the following:

- To offer multiple download links, such as to sell individual songs on an album, choose "Yes."
- To offer a single download of this item, choose "No."



Links Title

3. Click **Add New Link**. Then, do the following:
   a. Enter the **Title** and **Price** of the download.
   b. Choose one of the following distribution methods:

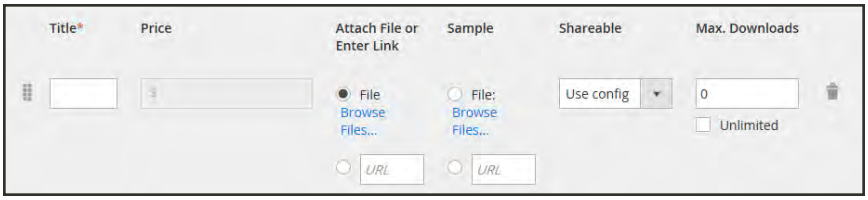
Attach File	Choose the **File** option. Then, browse to the file, and select it to upload.
Enter Link	Choose the **URL** option, Then, enter the full URL to the download file.

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.

d. Do one of the following:

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



Link Detail

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

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 New Link**.

Samples

3. Complete the link detail as follows:

   a. Enter the **Title** of the individual sample.

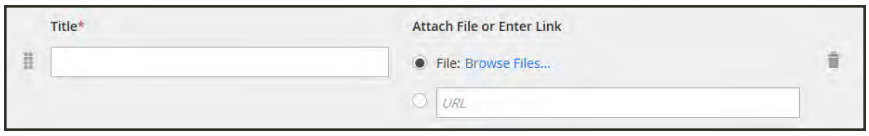
   b. Choose one of the following distribution methods:

Attach File	Choose the **File** option. Then, browse to the file, and select it to upload.
Enter Link	Choose the **URL** option, Then, enter the full URL to the sample file.

> Downloadable product file names can include letters and numbers. You can to use either a dash or underscore character to represent a space between words. Any invalid characters in the file name are replaced with an underscore.

c. To add another sample, tap **Add New Row**, and repeat these steps.

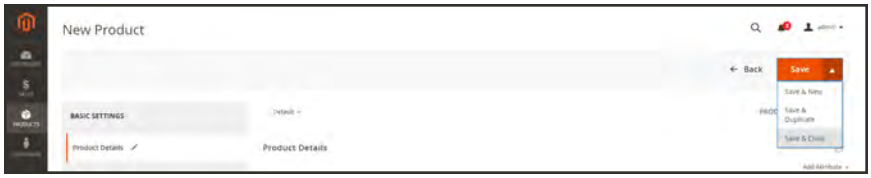
d. To change the order of the samples, tap the sort icon, and drag the sample to a new position.



Sample Detail

Step 6: Publish the Product

1. If you are ready to publish the downloadable product in your catalog, set the **Product Online** switch to the "On" position.
2. On the **Save** menu, choose **Save & Close**.



Save & Close

Step 7: View the Product in Your Store

On the **Admin** menu, choose **Customer View**.

Customer View

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

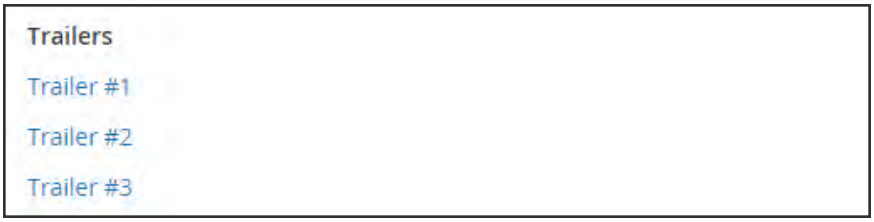
The downloadable configuration settings determine the default values and delivery options for downloadable products, and specify if guests can purchase downloads.

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:
   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:

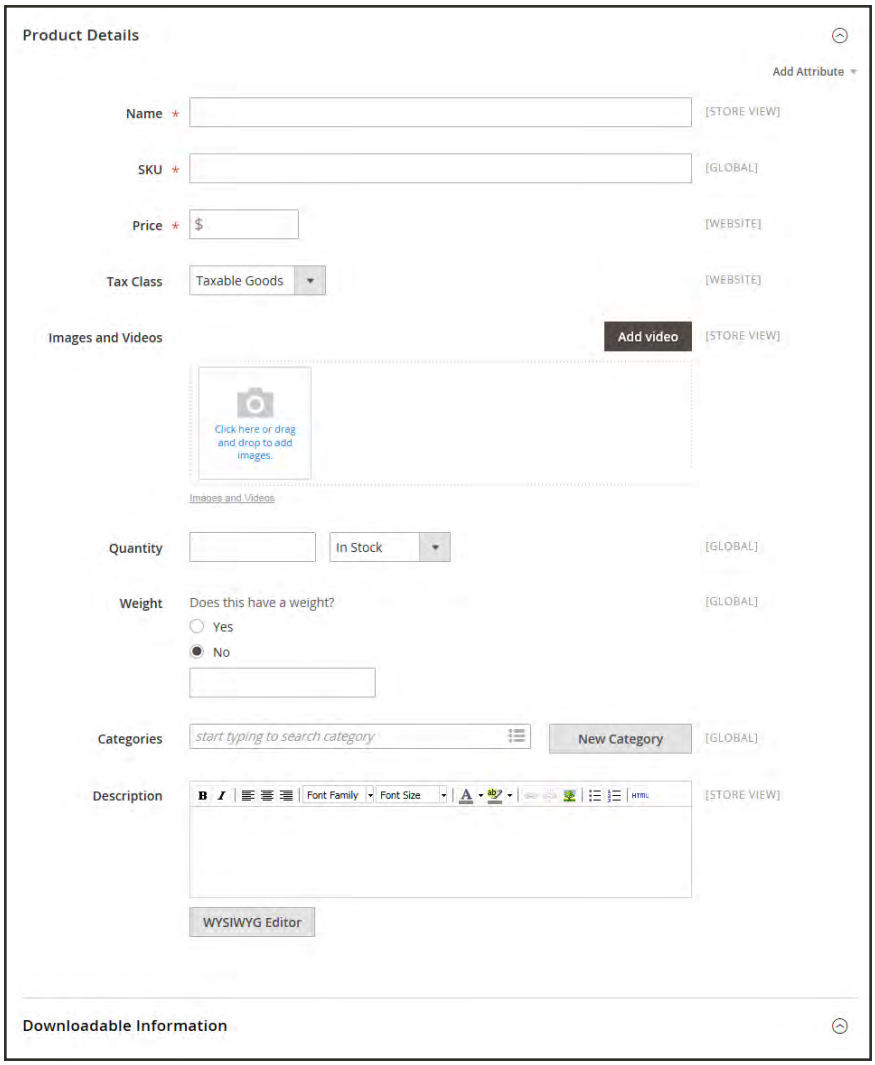
Yes	Allows customers to email the download link to others.
No	Prevents customers from sharing the download link with others by requiring customers to log in to their accounts to access download links.

   d. In the **Default Sample Title** field, enter the heading that you want to appear above the selection of samples.



Sample Title

   e. In the **Default Link Title** field, enter the default text that you want to use for download links.
   f. If you want the download link to open in a new browser window, set **Opens Links in New Window** to "Yes." This setting is used to keep the browser window to your store open.



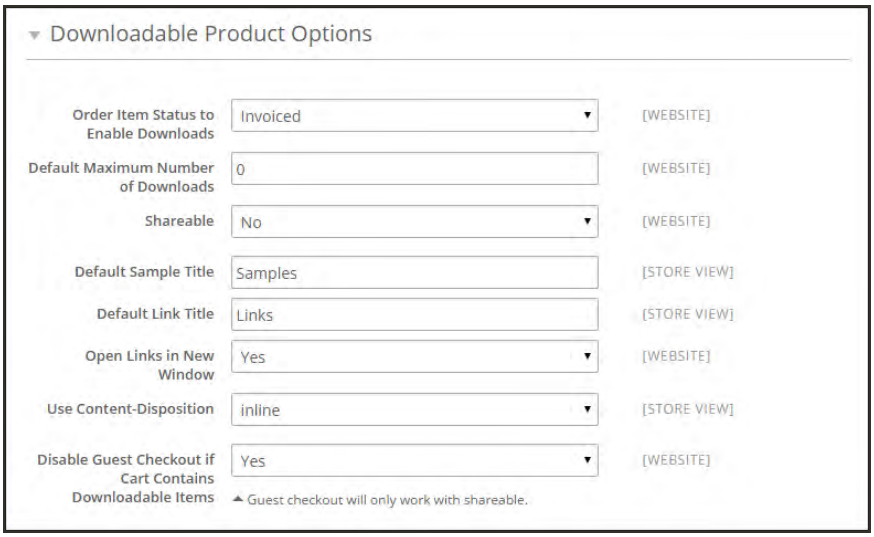
Product Details

g. To determine how downloadable content is delivered, set **Use Content Disposition** to one of the following:

Attachment	Delivers the download link by email as an attachment.
Inline	Delivers the download link as a link on a web page.

h. If you want to require that purchasers register for a customer account and log in before purchasing a download, set **Disable Guest Checkout if Cart Contains Downloadable Items** to "Yes."

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



Downloadable Product Options

Gift Cards

There are three kinds of gift card products: virtual gift cards sent by email, physical gift cards, which can be shipped to the recipient, and a combination of the two. Each gift card has a unique code, which can be redeemed by only one customer during checkout. A code pool must be established before gift cards can be sold.

Physical Gift Card

Virtual

A virtual gift card is sent to the recipient by email. The order requires an email address for the recipient. A shipping address is not necessary.

Physical

A physical gift card is shipped to recipient's address, which is required during the purchase of the gift card.

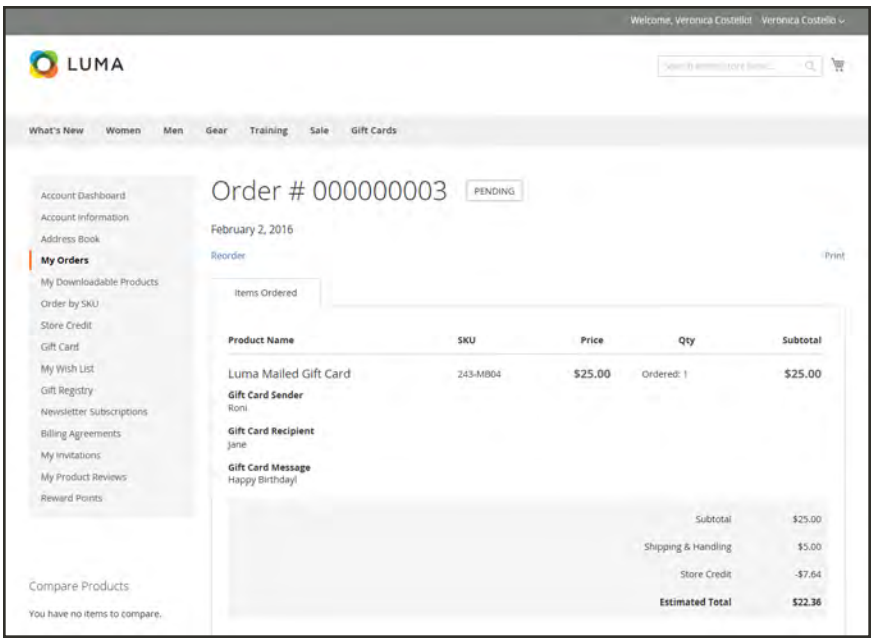
Combined

The gift card is shipped and emailed to the recipient. The recipient's email and shipping address is required to purchase the gift card.

Gift Card Workflow

Gift cards are redeemed in the shopping cart similar to the way a coupon is applied to an order. During checkout, the shopper enters the gift card code to apply an amount from the gift card to the purchase. Gift card holders who have customer accounts can check the status and remaining balance from their account dashboard. Single, as well as multiple gift cards can be used to pay for all, or part of a purchase.

The gift card code(s) applied to an order can be viewed by opening the order in the Admin, which makes it possible for you to retrieve the code to place it on a physical gift card, if necessary. If a gift card order is canceled or refunded, you must manually cancel the associated gift card account. You can either delete the account entirely, or deactivate it.



Gift Card Detail in Cart

Scenario

A customer shopping in the demo Luma store purchases either a virtual or physical gift card.

Virtual Gift Card	A Luma virtual gift card is emailed with an optional message to your special someone. It can be redeemed on any of the Luma family of websites and will never expire. Give the gift of purchase power!
Physical Gift Card	A Luma gift card is packaged in a custom art mailer, and sent at no charge to your special someone. It can be redeemed in store, by phone, or on any of the Luma family of websites. It will never expire. Give the gift of purchase power!

1. **Customer determines the gift card value.** The customer determines the value of the gift card from the product page. Depending on the configuration, there is either a fixed price field, a list of price options, or both. All amounts appear in the currency that is used in the store.

2. **Customer completes the gift card information.** For a physical gift card, the customer enters the Sender Name and Recipient Name. For virtual or combined gift cards, the customer also enters the Sender Email and Recipient Email. If the customer is logged in, the Sender Name (and Sender Email, if applicable) is entered automatically from their account. Depending on the configuration, the customer might also enter a message to the recipient.

3. **Customer completes checkout.** The gift card appears as a line item in the cart with detail that shows the name of the sender and recipient, and message, if applicable. The amount associated with the gift card is converted to the base currency of the store when it is added to the cart.

4. **Customer receives confirmation of the order.** The gift card purchaser can click the link in the confirmation to track the order from their account dashboard.

5. **Recipient receives the gift card.** For virtual or combined gift cards, the recipient receives an email with the gift card code, name of the sender, and message, if applicable. If multiple gift cards are purchased in a single order, and the type is either virtual or combined, all corresponding gift card codes are sent to the recipient in a single email.

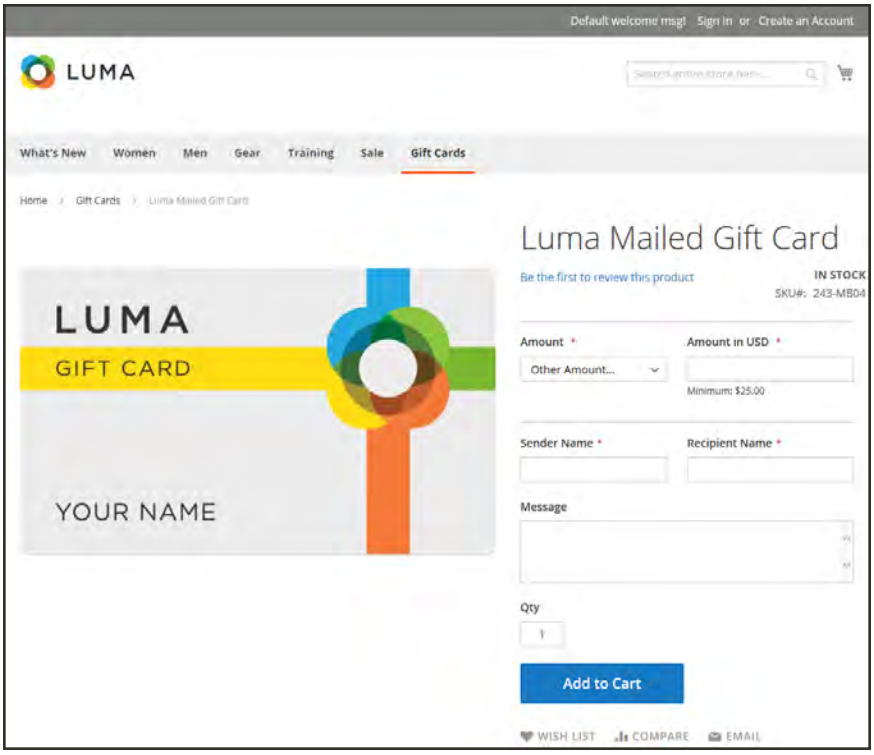
   Physical gift cards can be shipped directly to the recipient, or to the customer, who can then personally deliver the gift card to the recipient.

6. **Recipient applies gift card to purchase.** The gift card purchases an item in your store, and applies the gift card code during checkout. Each time a gift card is applied during checkout, the amount appears in the order totals block, and is subtracted from the grand total. The full balance of each gift card is subtracted from the shopping cart total.

   If multiple gift cards are used to pay for a purchaes, the amounts are applied in ascending order, starting with the card with the smallest remaining balance, until the customer runs out of cards, or until the grand total is zero. When the grand total reaches zero, the last gift card account applied to the cart receives a partial deduction. Any cards that have not been applied to the cart do not receive a deduction. The amounts are deducted from the gift card accounts only after the order is placed.

Creating a Gift Card

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



Gift Card Product Page

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Basic Product Details

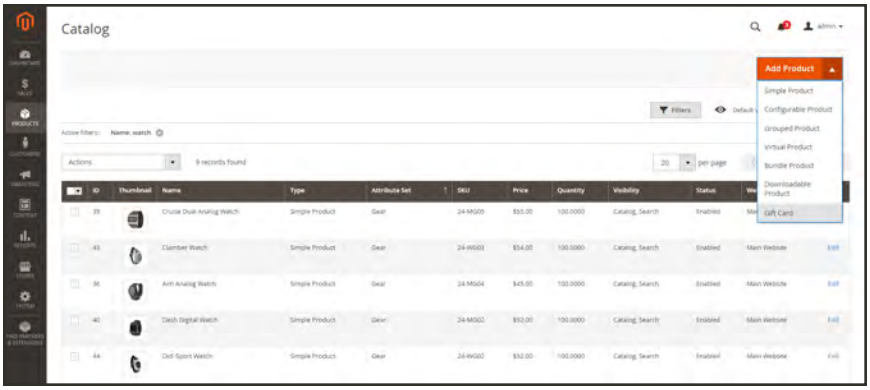
Step 4: Set Up Gift Card Pricing

Step 5: Complete the Gift Card Information

Step 6: Complete the Remaining Fields

Step 1: Choose the Product Type

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



Add Gift Card

Step 2: Choose the Attribute Set (Optional)

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.

Step 3: Complete the Basic Product Details

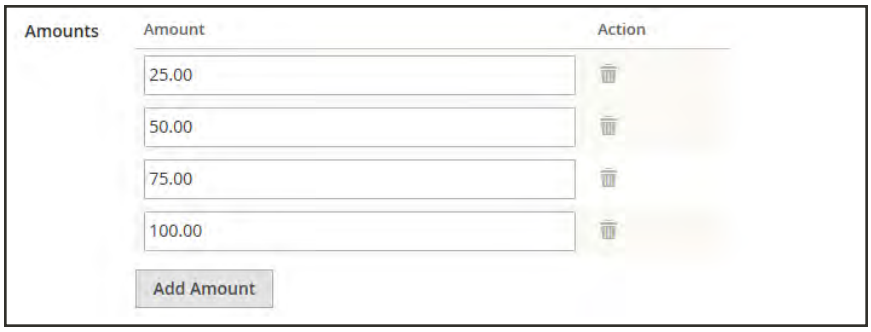
Under Product Details, do the following:

1. Enter a **Name** for the gift card. You can indicate the type of gift card in the name. For example, "Luma Mailed Gift Card."
2. Enter a **SKU** for the product. By default, the product Name is used as the 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.

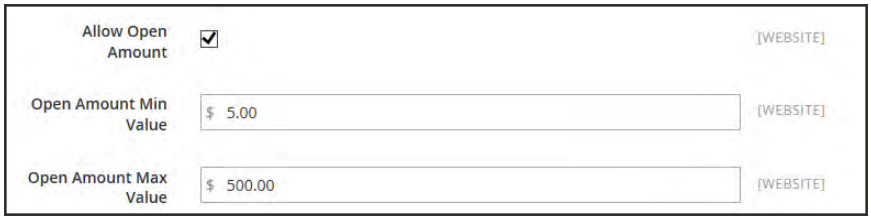
Step 4: Set Up the Gift Card Pricing

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.



Fixed Amounts

2. To give customers the ability to set the value of the gift card, do the following:
3. Mark the **Allow Open Amount** checkbox.
4. To define the range of minimum and maximum acceptable values, enter the **Open Amount Min Value** and **Open Amount Max Value**.
5. You can create gift card that offers customers either fixed pricing, or open amount pricing, or both.



Open Amount

Step 5: Complete the Gift Card Information

1. Scroll down to the Gift Card Information section. Because the settings in this section are determined by the system configuration, you must first clear the **Use Config Settings** checkbox to change a field value.
2. Clear the Use Config Settings checkbox of any of the following fields that you want to change:

Treat Balance as Store Credit	Determines if the gift card holder can redeem the balance as store credit.
Lifetime (days)	Determines the number of days after purchase until the gift card expires. If you do not want to set a limit for the lifetime of the card, leave this field blank.
Allow Message	Determines if the purchaser of the gift card can enter a message for to the recipient. A gift message can be included for both virtual (emailed) and physical (shipped) gift cards.
Email Template	Determines the email template that is used for the notification sent to the recipient of a gift card.

Step 5: Complete the Remaining Fields

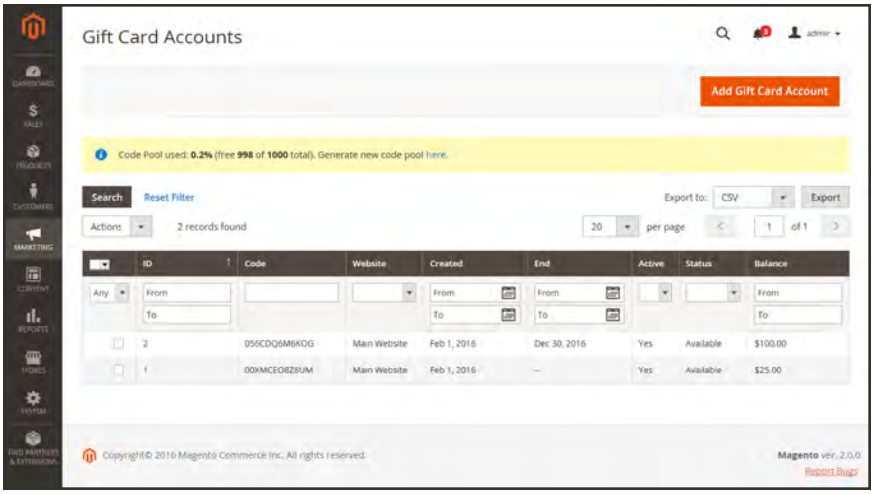
1. Complete the remaining fields in the following sections as you would for a simple or virtual product:
   - Images and Videos
   - Search Engine Optimization
   - Websites
2. When complete, tap **Save**.

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.

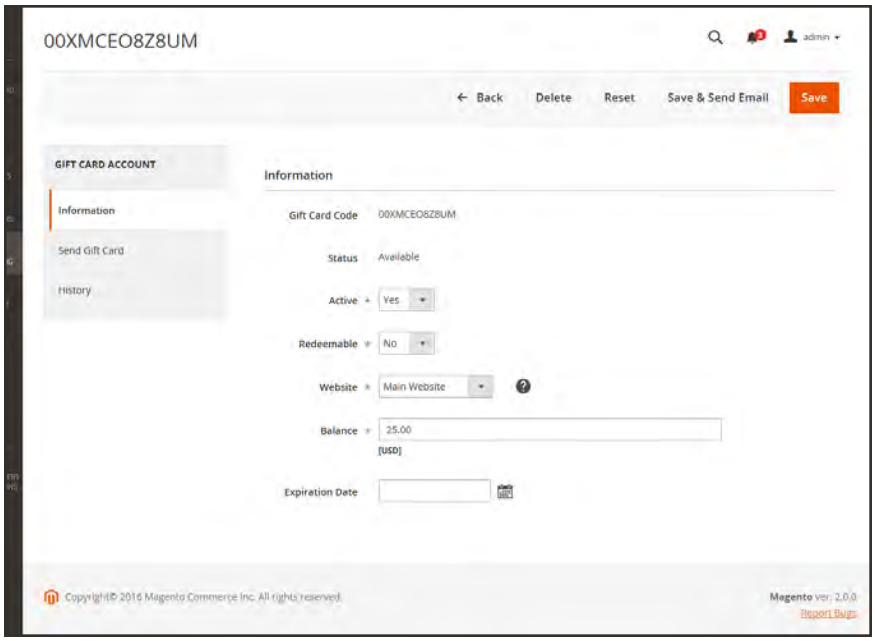


Gift Card Accounts

To examine an existing gift card account:

1. To find the number of the gift card account that you want to examine, 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. Find the gift card account in the list, and open in edit mode.

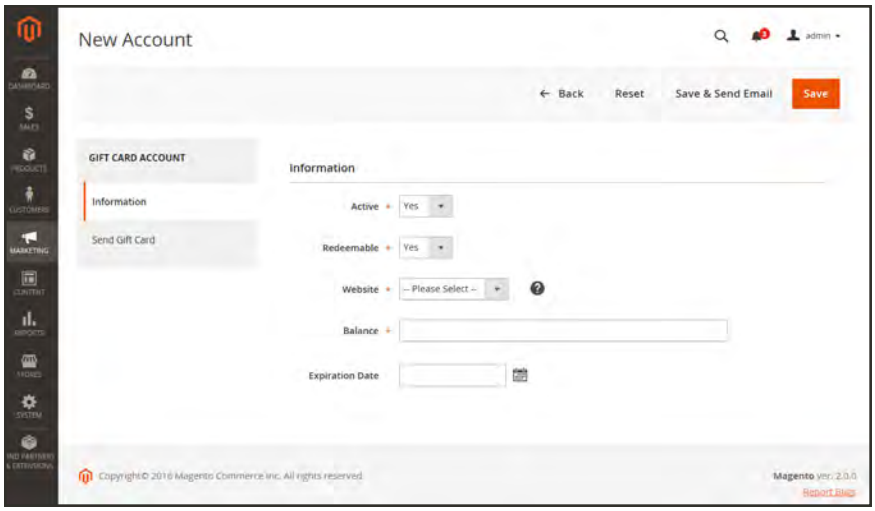
   The Gift Card Code appears at the top of the Information section.



Gift Card Account Information

To create a gift card account:

1. On the Admin sidebar, tap **Marketing**.
2. In the upper-right corner, click the **Add Gift Card Account** button. Then, do the following:



New Account

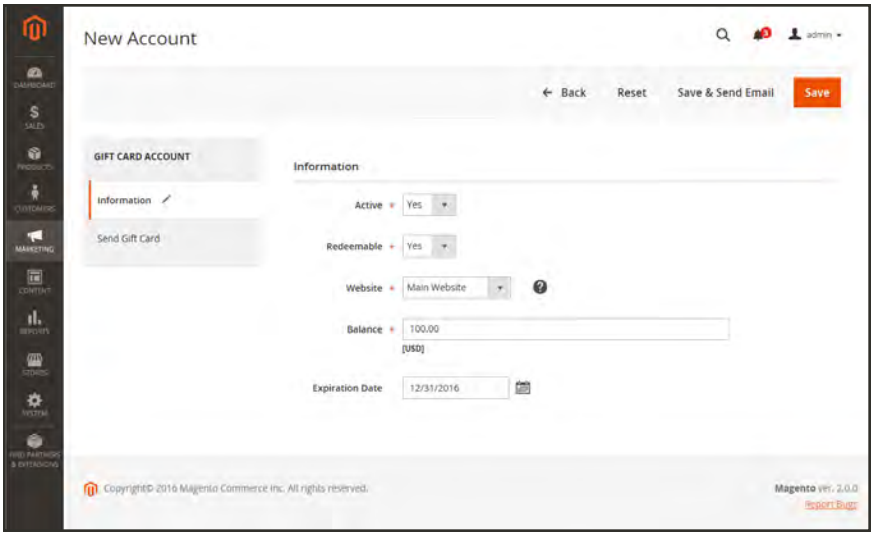
3. In the **Information** section, make sure that **Active** is set to "Yes." Then, do the following:

   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.



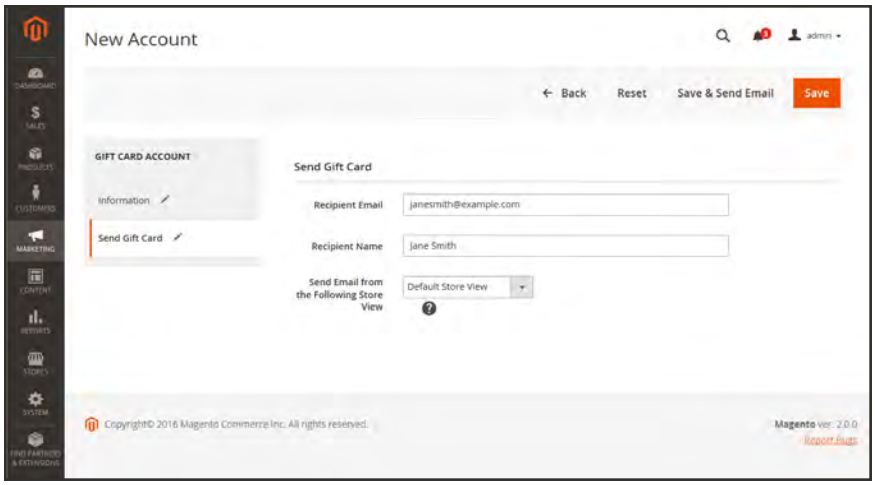
Gift Card Information

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:

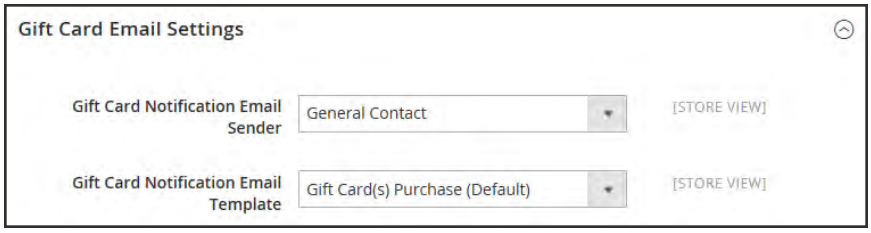
- If you are not ready to send the gift card, tap **Save**.
- Tap **Save & Send Email** to save the changes and send the gift card by email to the recipient.

Configuring Gift Card Accounts

Use the System Configuration Gift Card settings to establish the default settings for all gift cards sold through your store, and to generate 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 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 in the current pool available.

Step 1: Configure Email Notifications

1. On the Admin sidebar 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.



Gift Card Email Settings

4. Expand the **Email Sent from Gift Card Account Management** section. Then, do the following:
   a. Set **Gift Card Email Sender** to the store identity to appear as the sender of the gift cards.
   b. Set **Gift Card Template** to the template you want to use for the gift card.

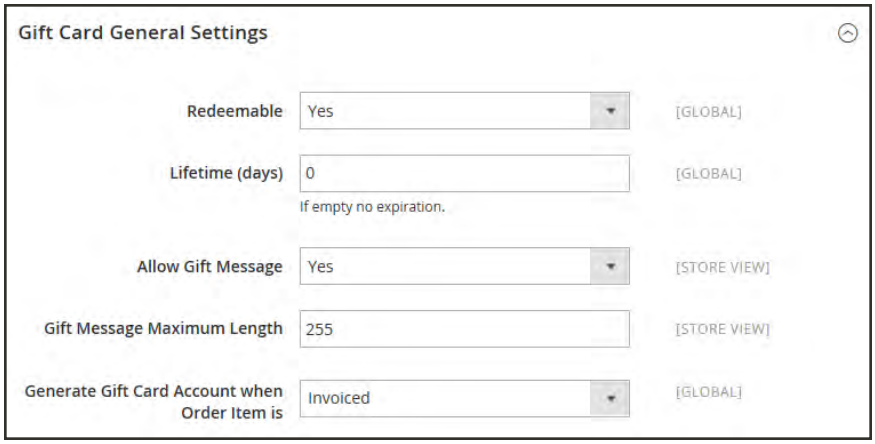
Step 2: Complete the General Settings

1. Expand the **Gift Card General Settings** section.
2. To allow the customer to redeem the value on the card for cash, set **Redeemable** to "Yes."
3. In the **Lifetime (days)** field, enter the number of days before the card expires. Leave the field blank if there is no expiration date.

   > Depending on your location, it may be illegal for gift cards to expire. Check your local laws before setting a lifetime for your gift cards.

4. If you want the customer to have the option to enter a message to accompany the gift card, set **Allow Gift Message** to "Yes." Then in the **Gift Message Maximum Length** field, enter the number of characters available for the message.
5. Set **Generate Gift Card Account when Orders Item is** to one of the following:

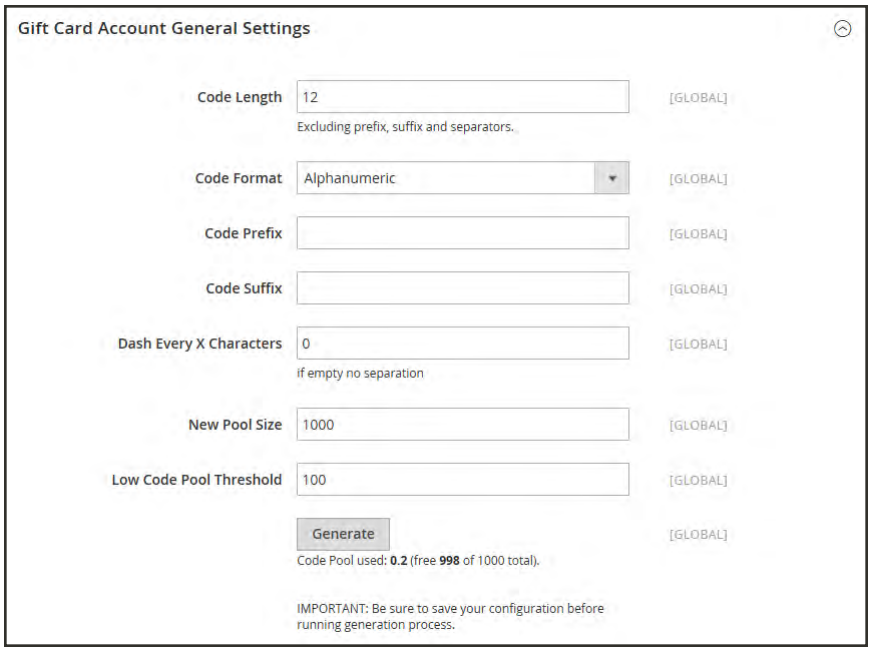
Ordered	The gift card account is created when the order is placed.
Invoiced	The gift card account is created after payment is captured and the order is invoiced.



Gift Card General Settings

Step 3: Establish the Gift Card Code Pool

6. Expand the **Gift Card Account General Settings** section. Then, do the following:



Gift Card Account General Settings

a. To customize the code, complete the following according to your preference:

- Code Length
- Code Format
- Code Prefix
- Code Suffix
- Dash Every X Characters

b. To determine the number of codes to generate, enter the **New Pool Size**.

c. To specify when you receive notification to restock the code pool, enter the **Low Code Pool Threshold**.

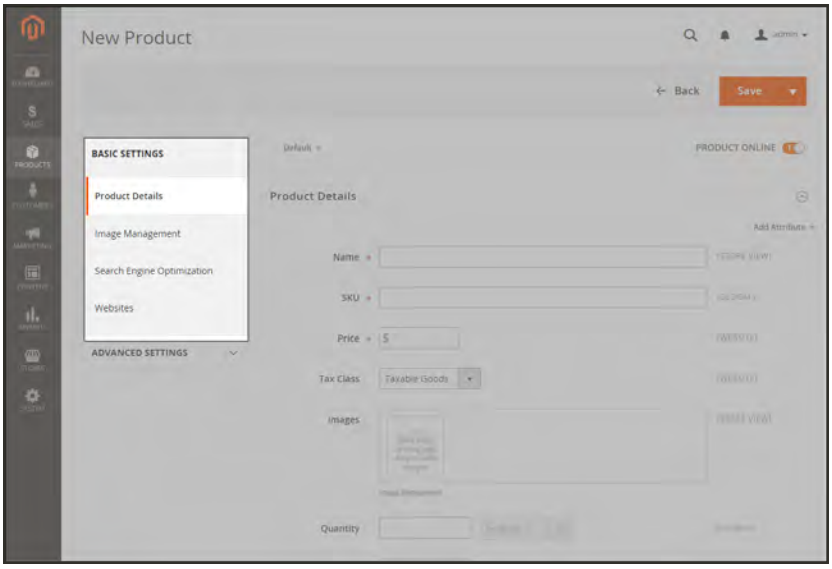
7. Before you generate the code pool, tap **Save Config**. Then, tap **Generate**.

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

CHAPTER 12:

Basic Settings

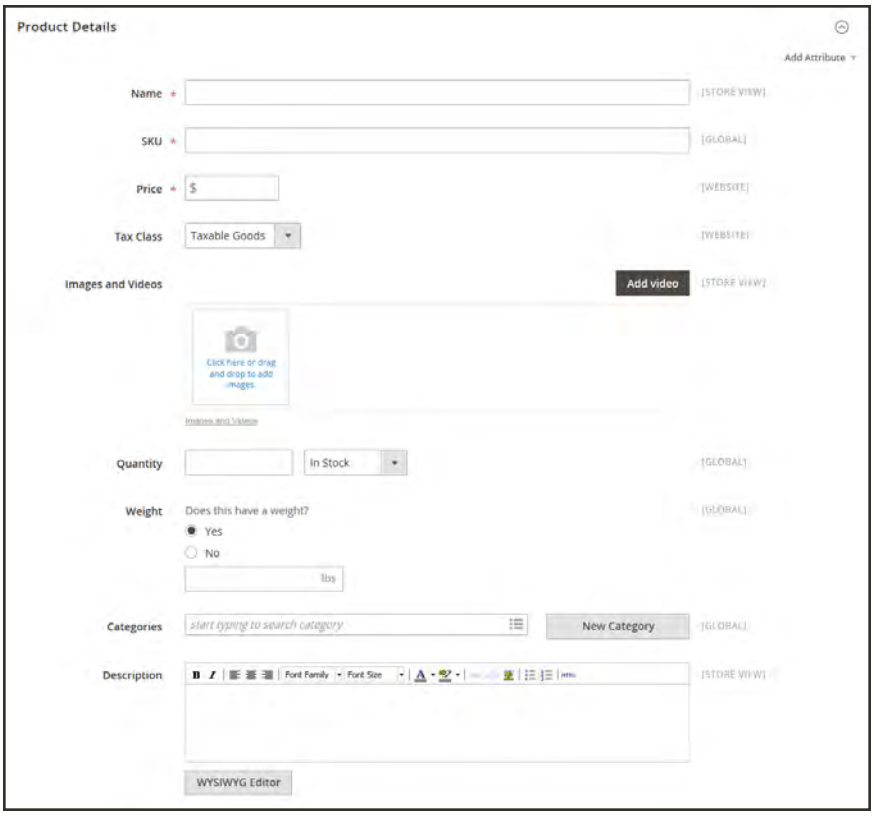
The Basic Settings section has a limited number of fields, and is designed to help you create products quickly.



Basic Settings

Product Details

The Product Details section provides basic information about the product, and includes workspace controls that give you the ability to add attributes and categories as you work on the product.



Product Details

Expand/Collapse

The Product Details section can be collapsed or expanded by clicking either the expand ⌄ or collapse ⌃ button to the right.

Configurations

The Configurations section can be used to generate product variations of the product, based on the value of a specific attribute. Configurations of a simple product can be used with a configurable product as drop-down options.

Configurations

Add Attribute

The Add Attribute control gives you the ability to add existing attributes, or create new ones. Any attribute that is added appears at the bottom of the Product Details section.

Add Attribute

Category Controls

To assign the product to existing categories, simply drill down through the category tree and choose the categories where you want the product to appear. To create a new category, tap the New Category button.

WYSIWYG Editor

The editor can be used to format the product description, and insert images into the text from media storage. The Show / Hide Editor button is used to toggle between two modes:

- What You See Is What You Get" (WYSIWYG) Mode
- Code View Mode

To learn more, see: Using the Editor.

WYSIWYG Editor

Field Descriptions (Default Template)

FIELD	SCOPE	DESCRIPTION
Name	Store View	(Required) The name of the product, as you want it to appear in the catalog.
SKU	Global	(Required) The Stock Keeping Unit is a unique identifier for each individual product or service provided. A default SKU is auto-generated, based on the product name.
Price	Website	(Required) The retail price of the product.
Tax Class	Website	The tax class that is associated with the product.
Images	Store View	Displays the images that are currently uploaded for the product.
Quantity	Global	The number of items currently in stock.
Weight	Global	The weight is used for shipping calculations, and is entered as a decimal using the standard unit of measurement for your locale. In the U.S., weight is measured in pounds and ounces, whereas countries on the metric system use grams and kilograms.
Categories	Global	Indicates the categories assigned to the product.
New Category		Assigns an additional category to the product.
Description	Store View	The main product description that appears on the product page. The product description is initially entered as plain text. The WYSIWYG Editor can be used to format the text with HTML tags, if permitted by the `description` attribute properties . Do not paste text directly from a word processor, because it might include print control codes that do not render correctly online. If using a word processor to compose the text, first save the description as a .txt file to strip out any control codes before copying and pasting it into the product description field.

Field Descriptions (Default Template) (cont.)

FIELD	SCOPE	DESCRIPTION
WYSIWYG Editor		Launches the editor in a pop-up window.

Images and Video

Using high-quality images of consistent proportion gives your product 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, it's a good idea to establish a naming convention for your image files, and organize them so you can find the originals if you ever need them.

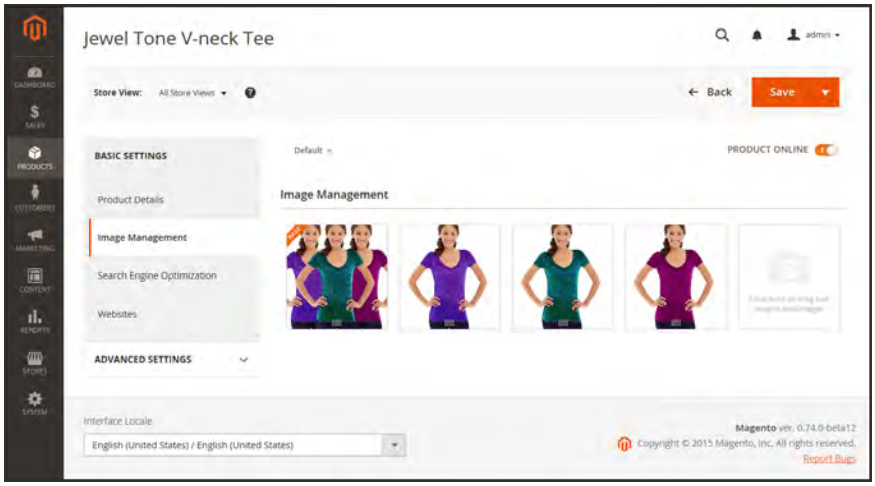


Image Management

A single product image might appear in several different sizes throughout the catalog. The size of the image container on the page is defined in the CSS, but how the image is used is determined by its role. 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 on the product page, 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 image as needed for each role. 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.

From the Product Detail section, you can perform basic image management tasks such as uploading multiple images, rearranging the order of the images, and controlling how each image is used. For additional control over individual images you can open the image in "detail view."

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.

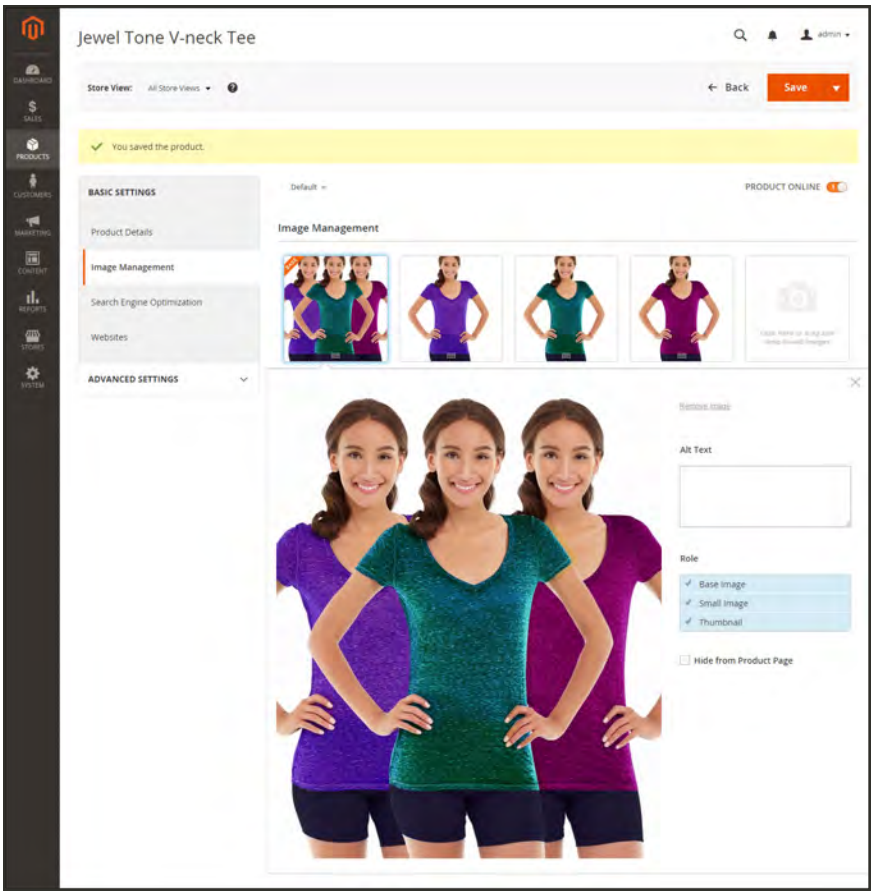


Image Detail

To perform basic image management:

1. Open the product in edit mode. Then, do any of the following:

Upload an Image

- Drag an image from your desktop, and drop it on the **camera** tile in the Images box.
- In the Images box, tap the **camera** tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

Drag and Drop Image

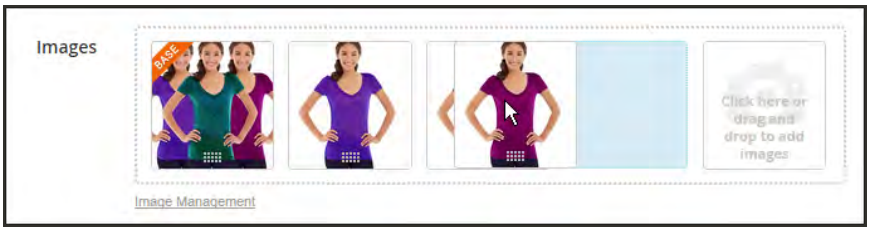
Assign the Base Image

An orange banner appears in the upper-left corner of the current base image.To use a different image as the base, move the mouse over the image that you want to use, and tap **Make Base**.

Make Base

Rearrange Images

To change the order of images in the gallery, tap the **Sort** icon at the bottom of the image tile. Then, drag the image to a different position in the Images box.



Change Order

Delete an Image

To remove an image from the gallery, tap the **Delete** icon in the upper-right corner of the image tile.

Remove Image

2. Tap **Save**

To view image detail:

1. To open an image in detail view:
   - Tap the **Image Management** link below the image tiles.
   - In the panel on the left under Basic Settings, tap **Image Management**.

   Then, do any of the following:

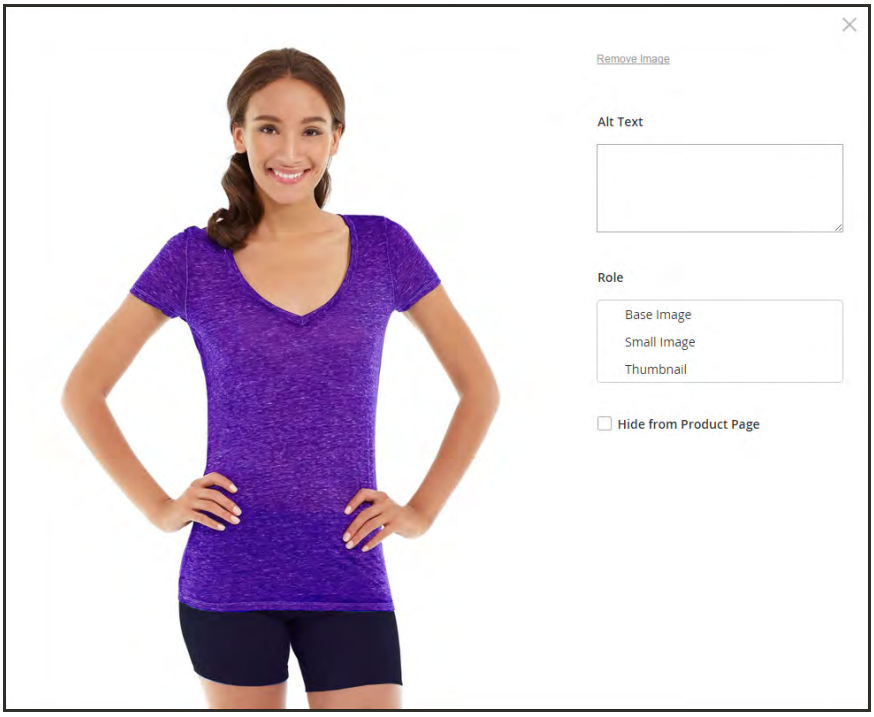


Image Detail

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

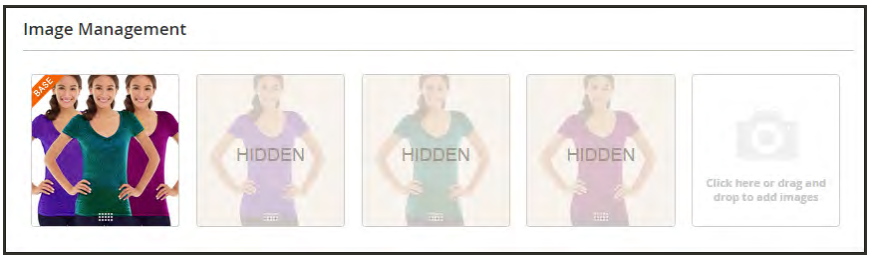
By default, all three roles are assigned to the first image that is uploaded to the product. To reassign a role to another image, do the following:

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.

The assigned role appears with a checkmark in selected mode, and the previous image is no longer assigned to the role.

Hide Images

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



Hidden Images

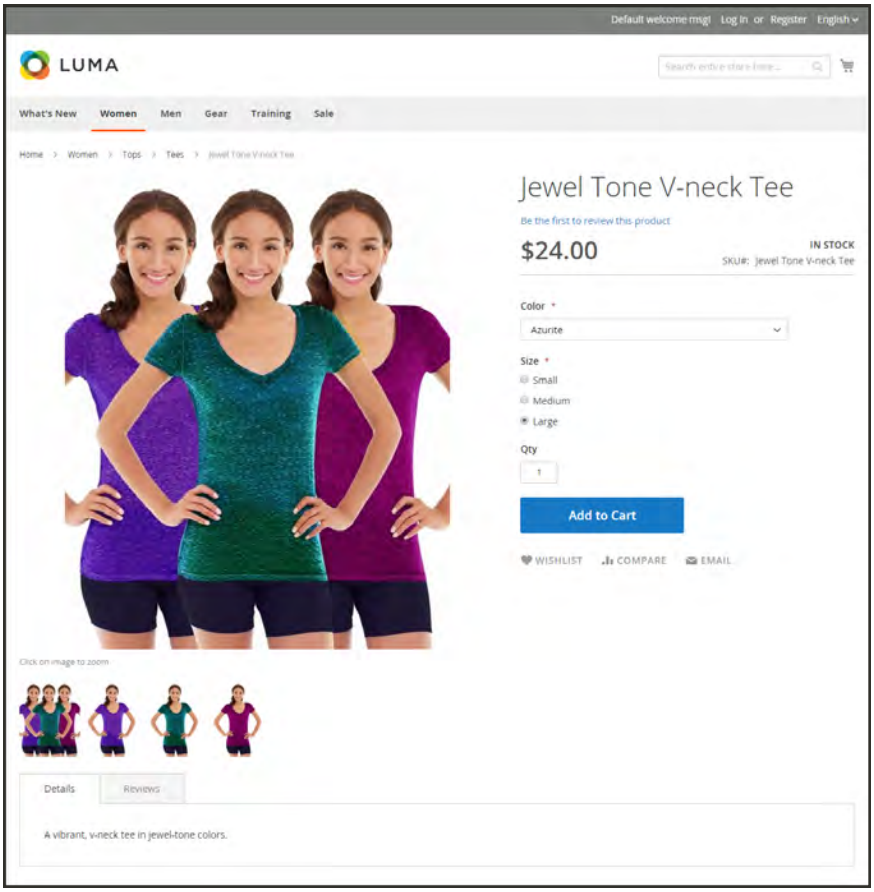
2. To close Detail View, click the **Close** box in the upper-right corner.
3. When complete, tap **Save**

Image Roles

IMAGE ROLE	DESCRIPTION
Thumbnail	Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels
Small Image	The small image is used for the product images in listings on category and search results pages, and to display the product images needed for sections such as for Up-sells, Cross-sells, and the New Products List. Example size: 470 x 470 pixels
Base Image	The base image is the main image on the product detail page. Image zoom is activated if you upload an image that is larger image than the image container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)

Media Gallery

The media gallery on the product page displays multiple images of the product. Each thumbnail can show a different view or variation of the product. Click a thumbnail to browse through the gallery, Although the position of the gallery varies by theme, the default position is just below the main image on the product page.



Media Gallery

Image Zoom

Customers can view a magnified portion of the image on mouseover, if the image is large enough to create the zoom effect. When zoom is activated, you can click the main image and move the cursor around to magnify different parts of the image. The magnified selection appears to the right of the image.

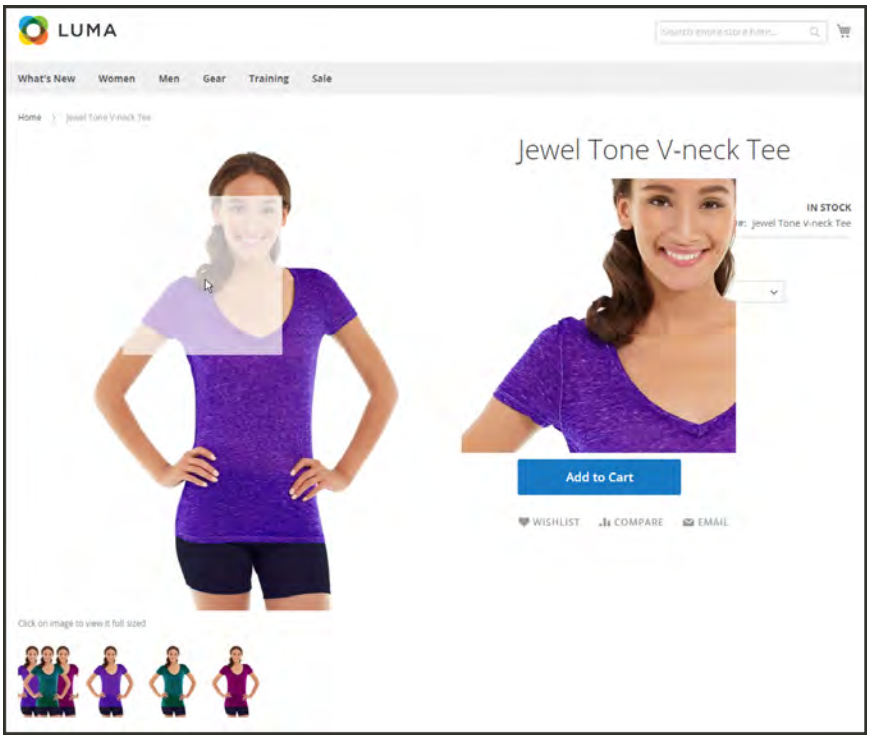


Image Zoom

Light Boxes and Sliders

There are many third-party light boxes and sliders that you can use instead of the default thumbnail gallery. You will find a variety of extensions in the “Images and Media” cateogory of Magento Connect.

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.

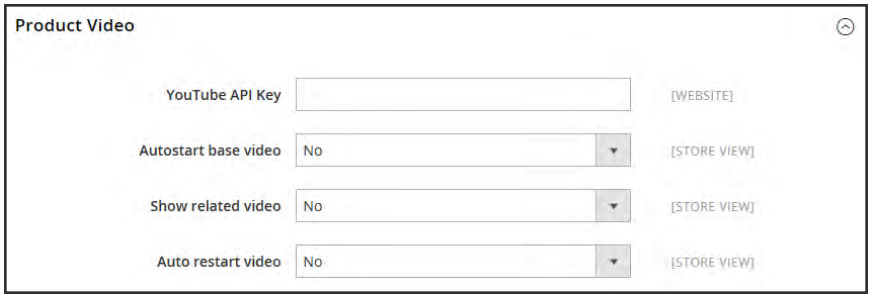
Step 1: Get Your YouTube API Key

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**.



Product Video

4. When complete, click **Save Config**.
5. When prompted, refresh the cache.

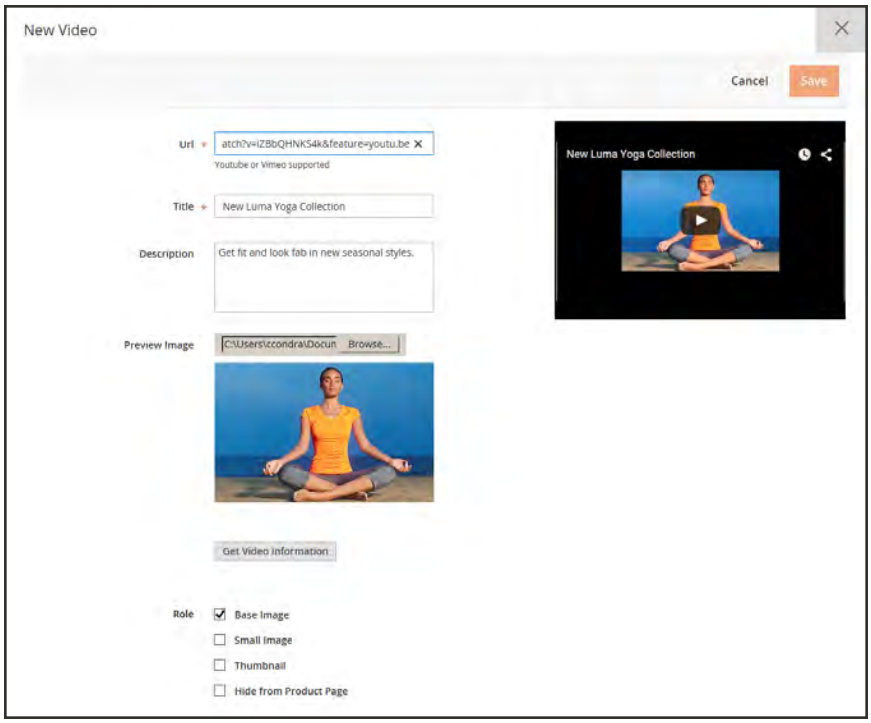
Step 3: Link to the Video

1. Open a product it edit mode. Then in the Images and Video section, tap **Add Video**.

   If you haven't yet entered your YouTube API key, click **OK** to continue. You won't be able to link to a YouTube video, but you can go through the process.

Add Video

2. Enter the **URL** of the YouTube or Video 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

FIELD	DESCRIPTION
URL	The URL of the associated video.
Title	The video title.
Description	The video description.
Preview Image	An uploaded image that is used as a preview of the video in your store.
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

Placeholders

Magento uses temporary images as placeholders until the permanent product images become available. A different placeholder can be uploaded for each role. The initial placeholder image is the Magento logo, which you can replace with an image of your choice.

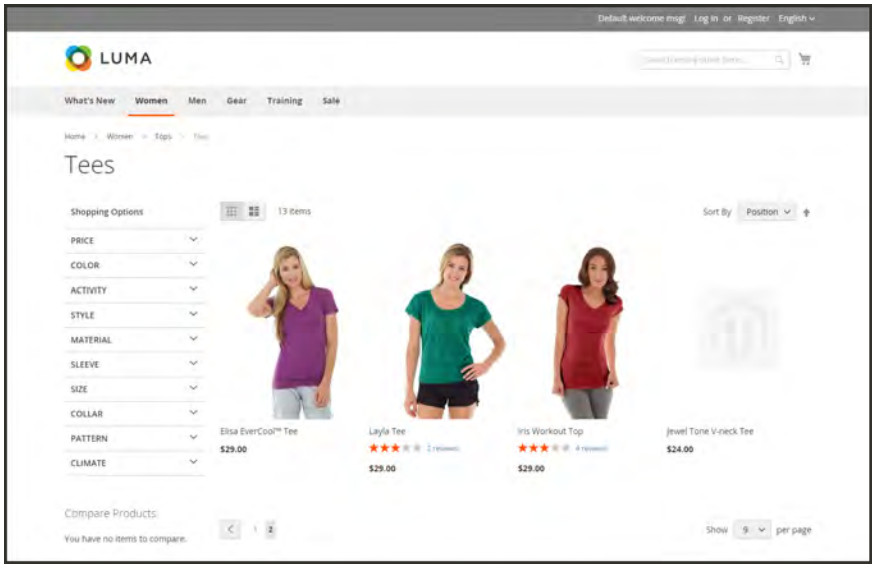


Image Placeholder

To upload placeholder images:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, and choose **Catalog**.
3. Expand the **Product Image Placeholders** section.
4. For each image role, tap **Choose File**. Find the image on your computer and upload the file. You can use the same image for all three roles, or upload a different placeholder image for each role.

Product Image Placeholders

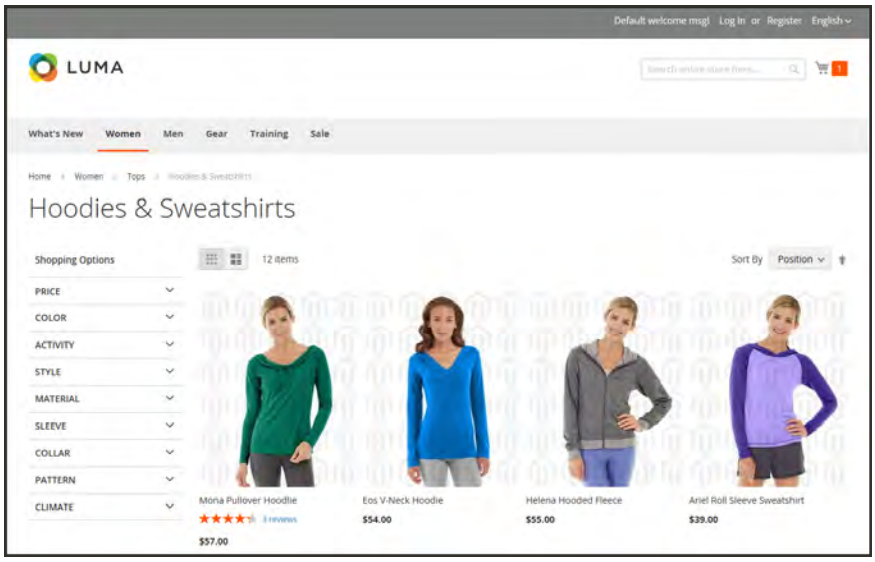
5. When complete, tap **Save**.

Watermarks

If you go to the expense of creating your own original product images, there is not much you can do to prevent unscrupulous competitors from stealing them with the click of a mouse. However, you can make them a less attractive target by placing a watermark on each image to identify them as your property. A watermark file can be either a .jpg (jpeg), .gif, or .png image. Both ,gif and .png formats support transparent layers, which can be used to give the watermark a transparent background.

The watermark used for the “small” image in the following example is a .png file with a black logo and transparent background, with the following settings:

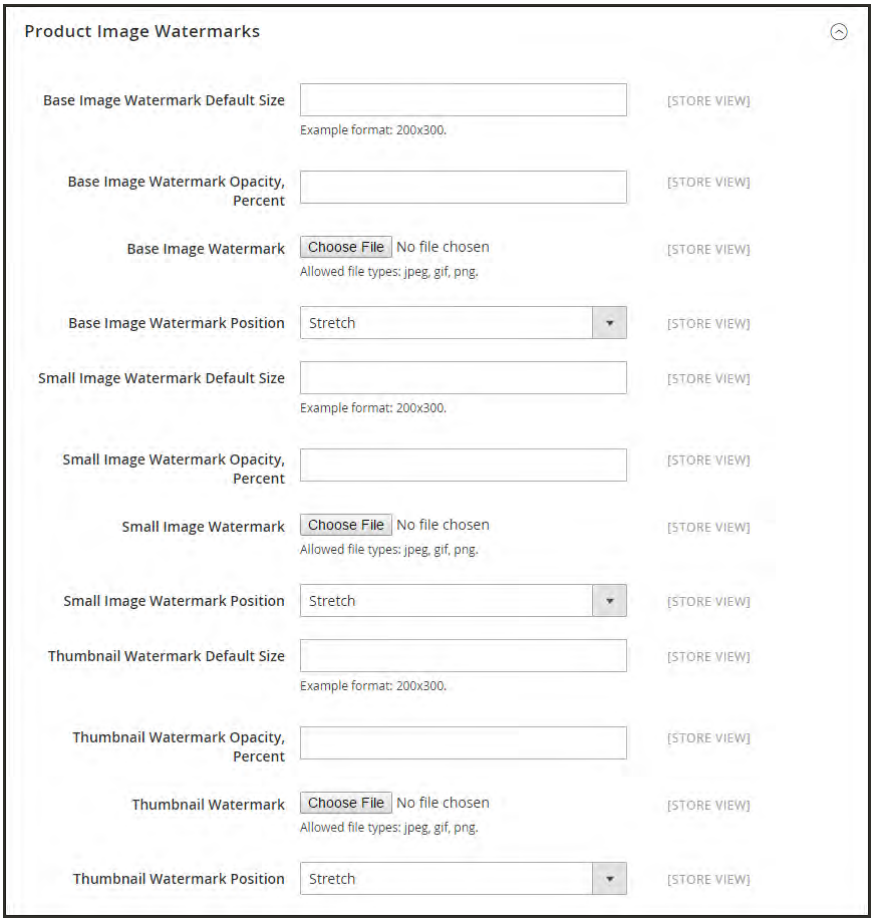
Size:	50x50
Opacity:	5
Position:	Tile



Tiled Watermark

To place watermarks on product images:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under General, choose **Design**.
3. Expand the **Product Image Watermarks** section. Then, complete the following steps for the Base, Small, and Thumbnail images:
   a. Enter the **Watermark Default Size**, in pixels. For example: 200 x 200
   b. Enter the **Watermark Opacity, Percent**, as a percentage. For example: 40
   c. Tap **Choose File**, and choose the image file to upload.
   d. Set **Watermark Position** to your preference.



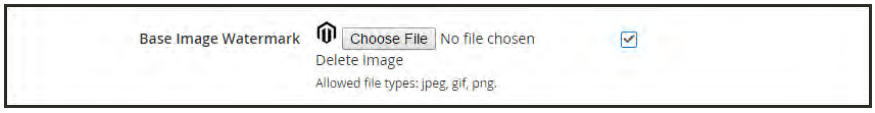
Product Image Watermarks

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

Refresh Cache

To delete a watermark:

1. Do one of the following:
   - Under the watermark thumbnail, tap **Delete Image**.
   - Mark the checkbox to the right of the watermark thumbnail.



Delete Watermark

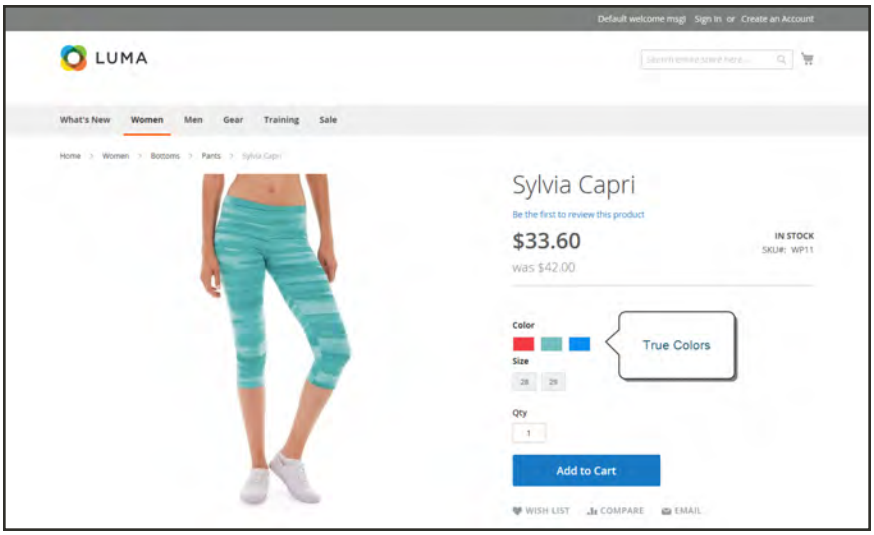
2. Tap **Save Config**.
3. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.

   If the watermark image persists in the storefront, return to Cache Management and tap **Flush Magento Cache**.

Swatches

Customers have high expectations when it comes to color, and it is crucial for product descriptions to accurately represent each available color, pattern, or texture. 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.

- Visual Swatch
- Text Swatch
- Dropdown



Swatches on Product Page

Creating Swatches

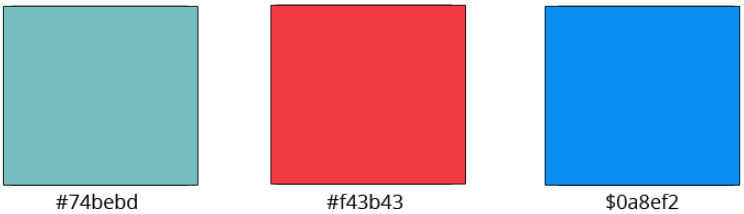
In the following examples, the Sylvia Capris are available in specific values of red, green, and blue. Because the swatches were taken from the product image, each is an accurate representation of the true color. The `color` attribute is used to manage the information for all product colors and swatches.

Step 1: Prepare the Swatches

Use either of the following methods to prepare swatches for your products.

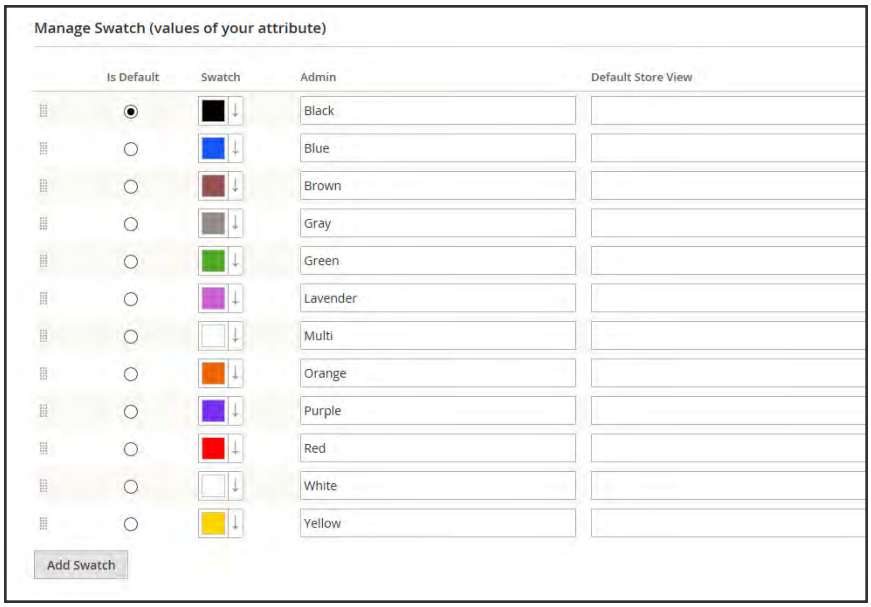
Method 1: Add a Color Swatch

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** to add a new definition to the bottom of the list. Then, do the following:



Manage Swatch Values

a. On the swatch menu, select **Choose a color**.

Choose a Color

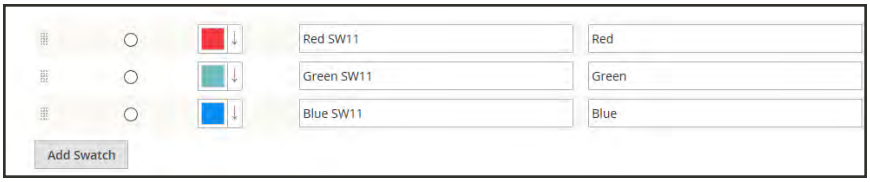
b. In the color picker, place your cursor in the **#** field, and press the **Backspace** key to delete the current value. Then, enter the six numbers that represent the hexadecimal value of the new color..

c. To save the swatch, tap the Color Wheel button in the lower-right corner of the color picker.

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.

e. Under **Is Default**, select the swatch that you want to use as the default option.

f. To change the order, d



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.

SwatchImages

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** to add a new definition to the bottom of the list. Then, do the following:

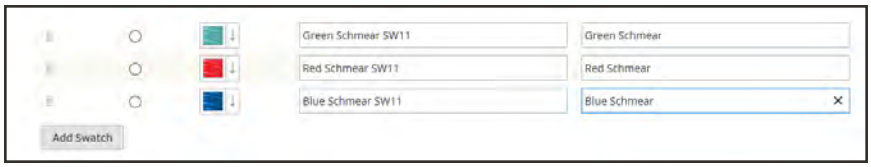
   a. On the swatch menu, choose **Upload a file**.

Upload a File

   b. Navigate to the swatch file that you prepared and choose the file for 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.



Upload a File

6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.

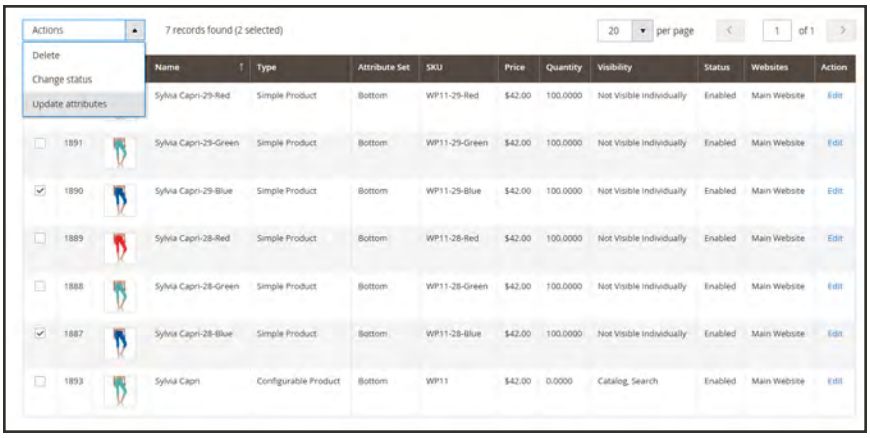
7. The last step is to open each product in Edit mode, and update the Color attribute with the correct swatch. To update multiple products at the same time, follow the steps below.

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.

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.”



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

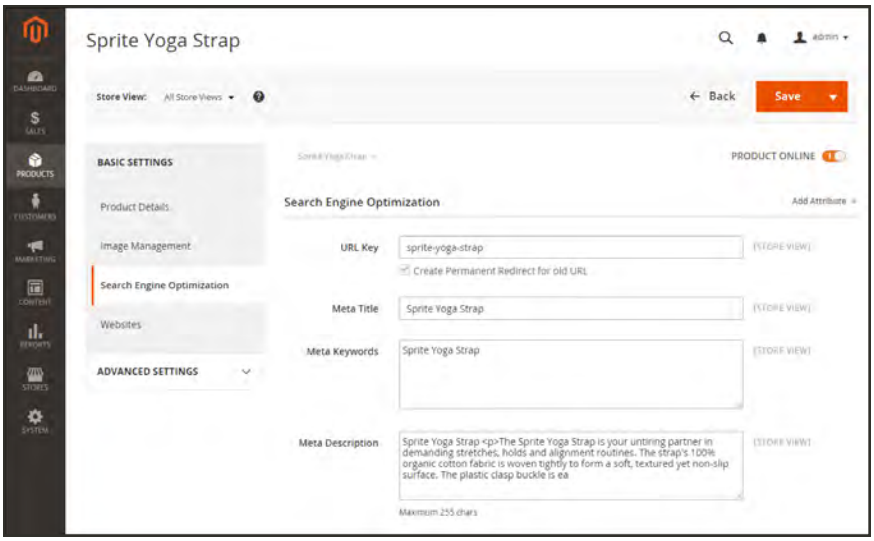
5. Choose the swatch that applies to the selected products, and tap **Save**. Then when prompted, refresh the cache.

Swatch in Storefront

Search Engine Optimization

The Search Engine Optimization page includes the primary fields 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.

The default value for each meta data field is auto-generated based on the configuration setting. Each field contains a placeholder that is replaced by an actual value. To learn more, see: Product Fields Auto-Generation.



Search Engine Optimization

Field Descriptions

FIELD	SCOPE	DESCRIPTION
URL Key	Store View	Determines the online address of the product.The URL key is added to the base URL of the store, and appears in the address bar of a browser. Magento initially creates a default, “search engine friendly” URL, that is based on the product name. 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.
Meta Title	Store View	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**[1]). The meta title should be unique to the page, and less than 70 characters in length. Auto-generated value: {{name}}
Meta Keywords	Store View	Relevant keywords for the product. Consider using keywords that customers might use to find the product. Auto-generated value: {{name}}
Meta Description	Store View	The meta description provides a brief overview of the page for search results listings. An ideal length is between 150-160 characters in length, with a maximum of 255 characters. Although not visible to the customer, some search engines include the meta description on the search results page. Auto-generated value: {{name}} {{description}}

[1] Search Engine Results Page

Gift Options

Gift Options can be set at the product level to allow a gift message, printed card, and gift wrapping to be applied 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.

   In the panel on the left under **Basic Settings**, choose **Gift Options**. Then, do the following:

   a. To override the default setting, clear the **Use Config Settings** checkbox.

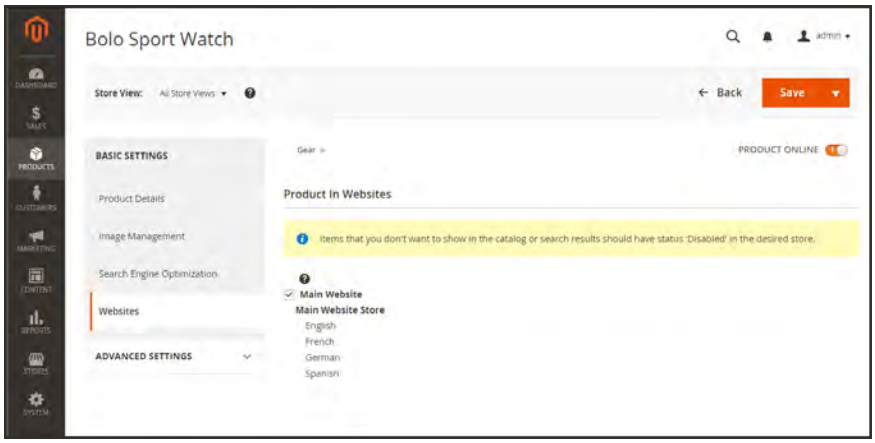
   b. Set **Allow Gift Message** and **Allow Gift Wrapping** as needed for the product.

   c. To charge a different amount for gift wrapping than is specified in the configuration, enter a **Price for Gift Wrapping** that applies only to this product. If left blank, the price specified in the configuration is used.

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

Websites

The Websites page shows the current scope of the product within the store hierarchy. In the following screenshot, the marked checkbox indicates the website, store, and views where the product is available. To assign a product to a specific store view, use the Store View control in the upper-right corner of the page.



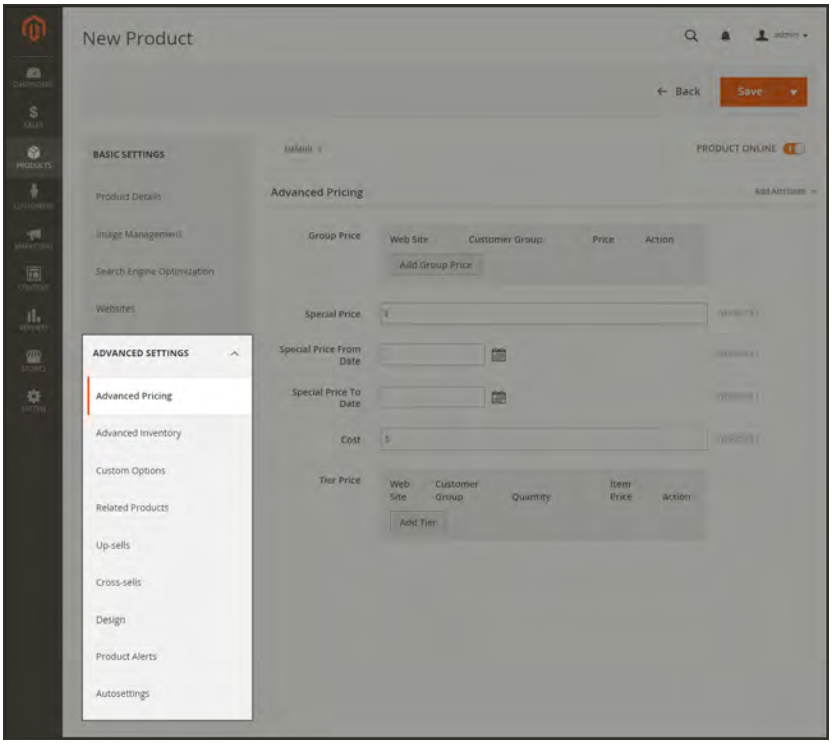
Websites

Notes

CHAPTER 13:

Advanced Settings

The Advanced Settings section includes some advanced tools, and other tools that are used less frequently.

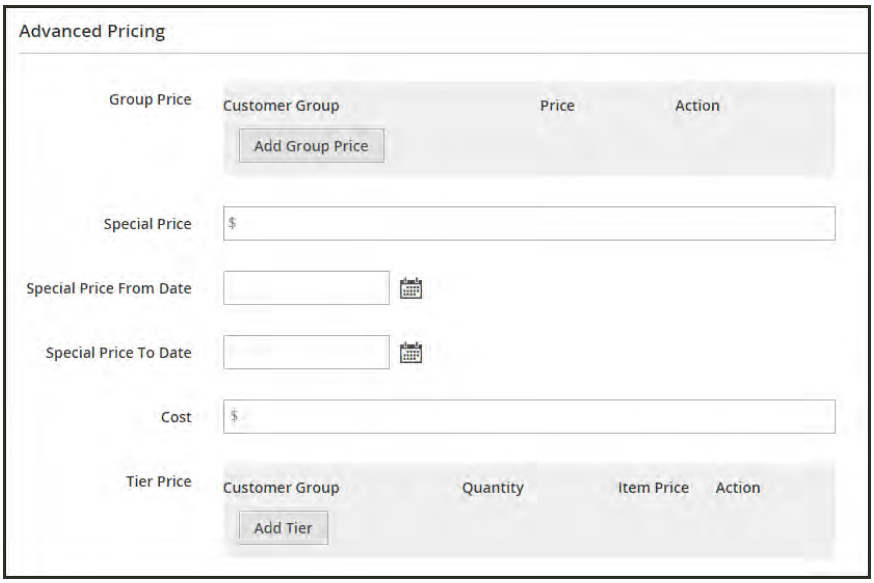


Advanced Settings

Advanced Pricing

The Advanced Pricing settings are used to define the conditions for special pricing based on customer group and website, and for quantity discount tier pricing. Topics in this section:

- Group Price
- Special Price
- Tier Price



Advanced Pricing

Field Descriptions

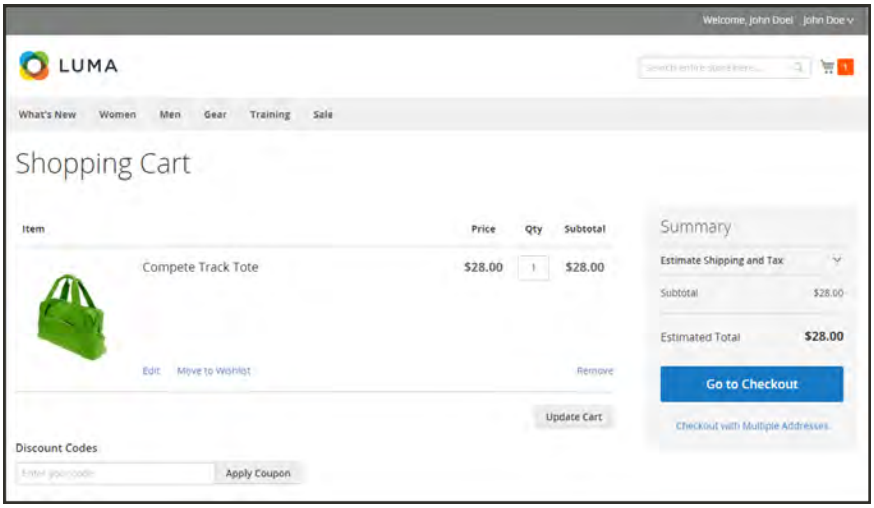
FIELD	DESCRIPTION	
Group Price	Sets up promotional prices for specific customer groups within the selected website. Options:	
	Web Site	Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.
	Customer Group	(Required) Identifies the customer group that qualifies to receive the group price.
	Price	(Required) Specifies the product price for members of the customer group, within the specific website.

Field Descriptions (cont.)

FIELD	DESCRIPTION	
	Actions	Deletes the current Group Price rule.
Add Group Price	Inserts an additional row for a new Group Price rule	
Special Price	Offers a discounted price during the time period defined by the From/To dates. In the storefront when a special price is available, the retail price is crossed out and the special price appears below in large, bold text.	
Special Price From Date	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.	
Special Price To Date	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.	
Cost	The actual cost of the item.	
Tier Price	Offers a quantity discount to members of a specific customer group and website. Options:	
	Web Site	Identifies a specific website where the tier price rule applies.
	Customer Group	Identifies a specific customer group that qualifies to receive the tier price discount.
	Quantity	(Required) The quantity that must be purchased to receive the tier price.
	Item Price	(Required) The discounted product price for the quantity purchased.
	Actions	Deletes the current tier price rule.
Add Tier	Inserts an additional row for a new tier price rule definition.	

Group Price

You can extend a discounted price to members of a specific customer group, if they shop while logged in to their accounts. The discounted price appears in the shopping cart instead of the regular price.



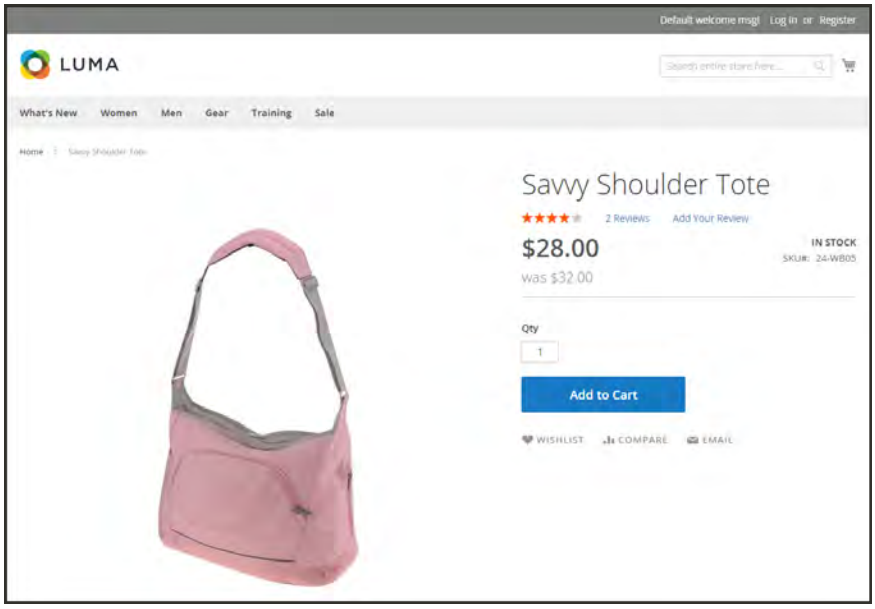
Group Price Applied in Shopping Cart

To set up a group price:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**.
3. In the Group Price section, tap **Add Group Price**. Then, do the following:
   a. Set **Customer Group** to the group that is to receive the discounted price.
   b. Enter the discounted **Price**.
4. To add another group price tap **Add Group Price** and repeat the previous steps.
5. When complete, tap **Save**.

Special Price

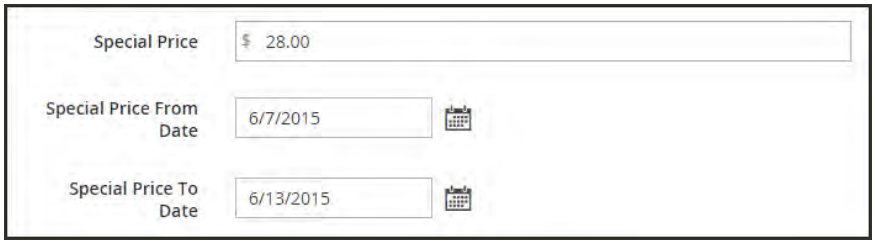
To offer a special price, enter the discounted price and the dates when the special price is in effect. The special price appears instead of the regular price, followed by “was (previous price).”



Special Price

To apply a special price:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**.
3. Enter the amount of the **Special Price**.
4. Complete the **Special Price From Date** and **Special Price To Date** to define the period of time that the special price is in effect. To pick the dates, tap the **Calendar** button to the right of each field.



Special Pricing Settings

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

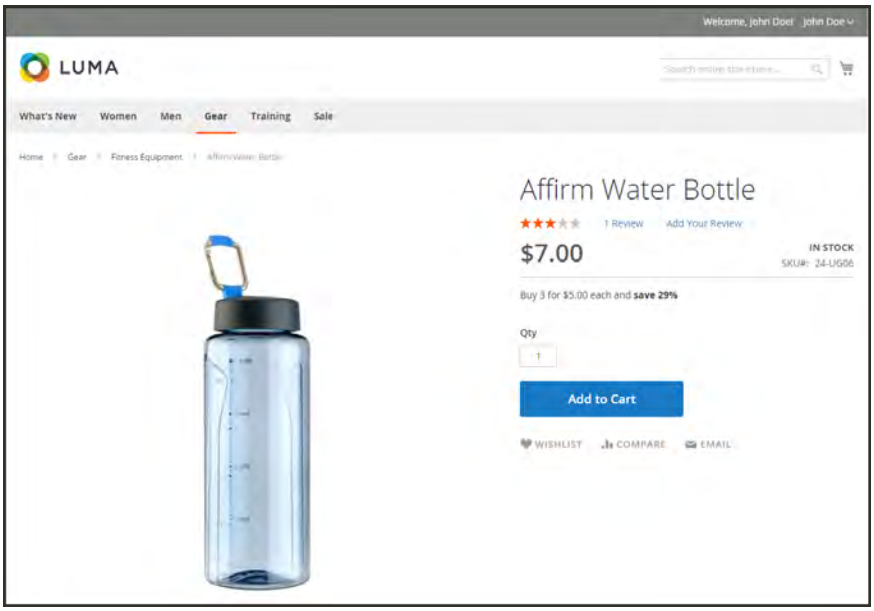
Tier Price

Tier pricing lets you offer a quantity discount from the catalog list and product detail pages. The discount can be applied to a specific store view or customer group.

Tier Price "As Low as"

- On the catalog page, the product price includes the words, "As Low As," followed by the lowest tier price.
- The product page calculates the quantity discount and displays a message such as:

> Buy 3 for $5.00 each and save 29%



Tier Price on Product Page

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. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**.
3. In the Tier Price section, tap **Add Tier**. Then, do the following:

Tier Pricing

   a. If your store has multiple websites, choose the **Website** where the tier pricing applies.
   b. Choose the **Customer Group** to which the tier pricing applies.
   c. In the **Qty** field, enter the quantity that must be ordered to receive the tier price.
   d. In the **Price** field, enter the adjusted price of the item.

   To apply the same tier to more than one group, create a separate tier for each group, but with the same Qty and Price information.

4. To add another group price, tap **Add Tier** and repeat the previous steps.
5. When complete, tap **Save**.

Minimum Advertised Price

Merchants are sometimes prohibited from displaying a price that is lower than the manufacturer's suggested retail price (MSRP). Magento's Minimum Advertised Price (MAP) gives you the ability to remain in compliance with the manufacturer's requirements while offering your customers a better price. Because requirements differ from one manufacturer to another, you can configure your store to prevent the display of your actual price on pages where it is not allowed to appear according to the terms of the manufacturer.

MAP Logic

For products with prices that depend on a selected options, (such as custom options, or simple products with their own SKUs and stock management), the following logic is used:

- MAP is applied to the main price. The prices of options, bundle items, and associated products (which add or subtract from the main price) appear normally.
- If a product does not have a main price, and its price is derived from the associated product prices (such as in a grouped product), the MAP settings of the associated products are applied.
- If a product in the cart has the Manufacturer's Suggested Retail Price (MSRP) specified, the price is not crossed-out.

For other price settings, the following MAP logic is used:

- If tier pricing is set, the tier price appears according to the Display Actual Price setting.
- If a special price is set, it is considered to be the actual price for MAP.

In the order management and customer management tools, as well as in the reports sections of the Admin, only the actual price appears.

Using MAP with Product Types

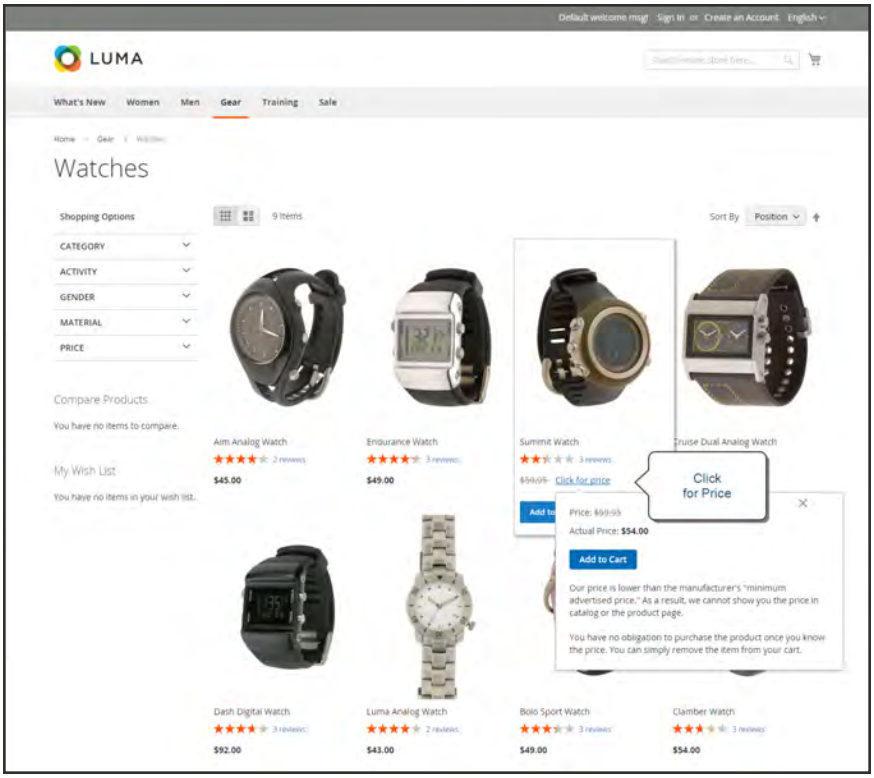
PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Custom option prices appear normally.
Grouped	The prices of associated simple products do not automatically appear on catalog list and product pages, but are included only according to the Display Actual Price setting.
Configurable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Option prices appear normally.
Bundle (with fixed price)	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. 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

PRICE SETTING	DESCRIPTION
Tier Price	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 is shown according to the Display Actual Price setting.
Special Price	If the Special price is specified, the special price is displayed according to the Display Actual Price setting.

Configuring MAP

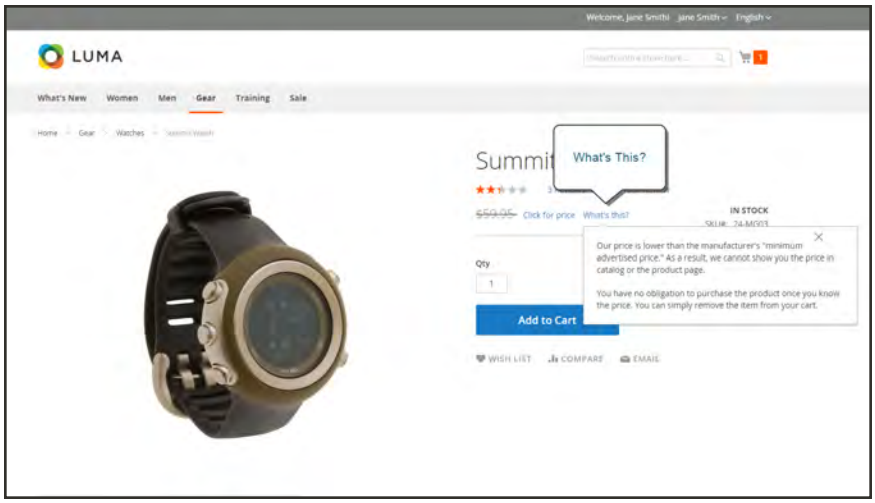
Your store's MAP settings can be applied to all products in your catalog, or configured for only specific products. When Minimum Advertised Price is enabled globally, all product prices in the storefront are hidden from view. There are a variety of configuration options that you can use to remain in compliance with the terms of your agreement with the manufacturer, while still offering your customers a better price.



Actual Price Appears "On Gesture"

On the global level, you can enable or disable MAP, apply it to all products, define how the actual price is displayed, and edit the text of the related messages and information tips that appear in the store.

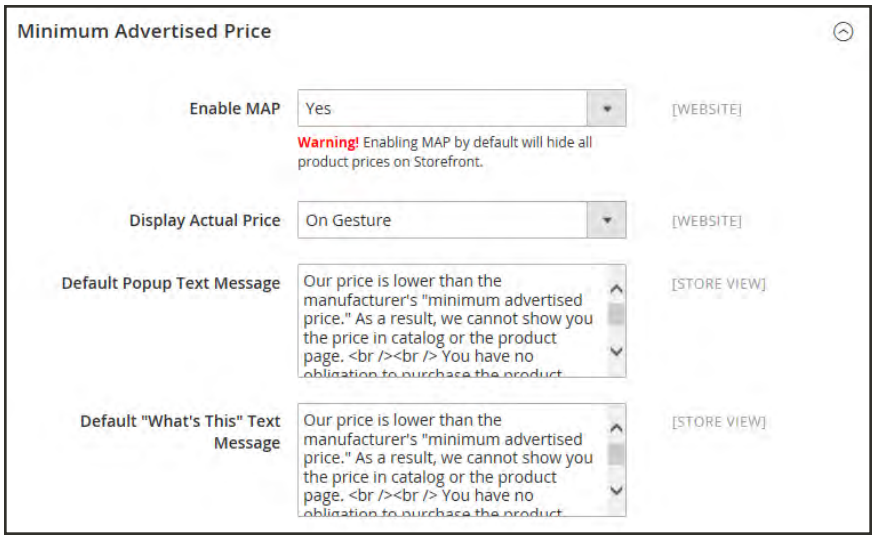
When MAP is enabled, the product-level MAP settings become available. You can apply MAP to an individual product by entering the MSRP, and choosing how you want the actual price to appear in the store. Product-level MAP settings override the global MAP settings.



What's This?

To configure MAP:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If applicable, in the upper-right corner, set **Store View** to the view where the configuration applies.
3. In the panel on the left under **Sales**, choose **Sales**.
4. Expand the **Minimum Advertised Price** section.
5. If necessary, set **Enable MAP** to "Yes." Then, do the following:



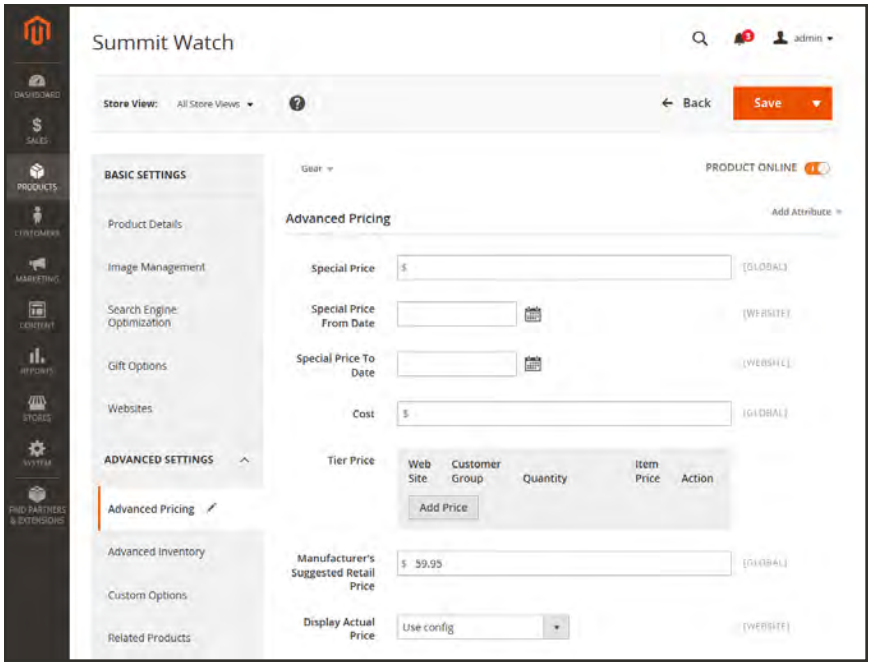
Minimum Advertised Price

Method 1: Configure MAP for All Products:

1. To determine when and where you want the actual price to be visible to customers, 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 for the **Default Popup Text Message**.
3. Enter any additional explanation in the **Default "What's This" Text Message** field.
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:

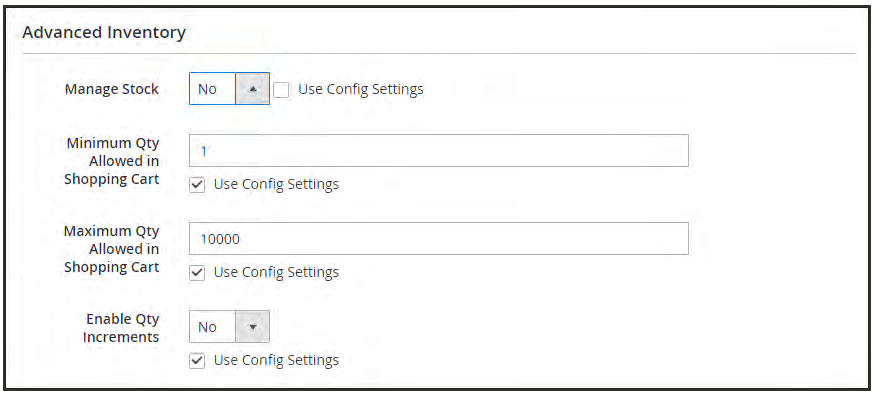
Use config	(Default) Applies the MAP configuration setting.
On Gesture	Displays the actual product price in a popup when the customer clicks the "Click for price" or "What's this?" link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product 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.

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

Advanced 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 (Short Form)

Method 1: Without Stock Management

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Inventory**.
3. Set **Manage Stock** to "No." If necessary, clear the **Use Config Settings** checkbox to make the field available.
4. Enter the **Minimum Qty Allowed in Shopping Cart**.
5. Enter the **Maximum Qty Allowed in Shopping Cart**.
6. If you want to sell by quantity increment, do the following:
   a. Set **Enable Qty Increments** to "Yes."
   b. In the **Qty Increments** field, enter the number of products that must be purchased in an incremental step. For example, if you enter 6, the customer must purchase the product in quantities of 6, 12, 18, and so on.
7. When complete, tap **Save**.

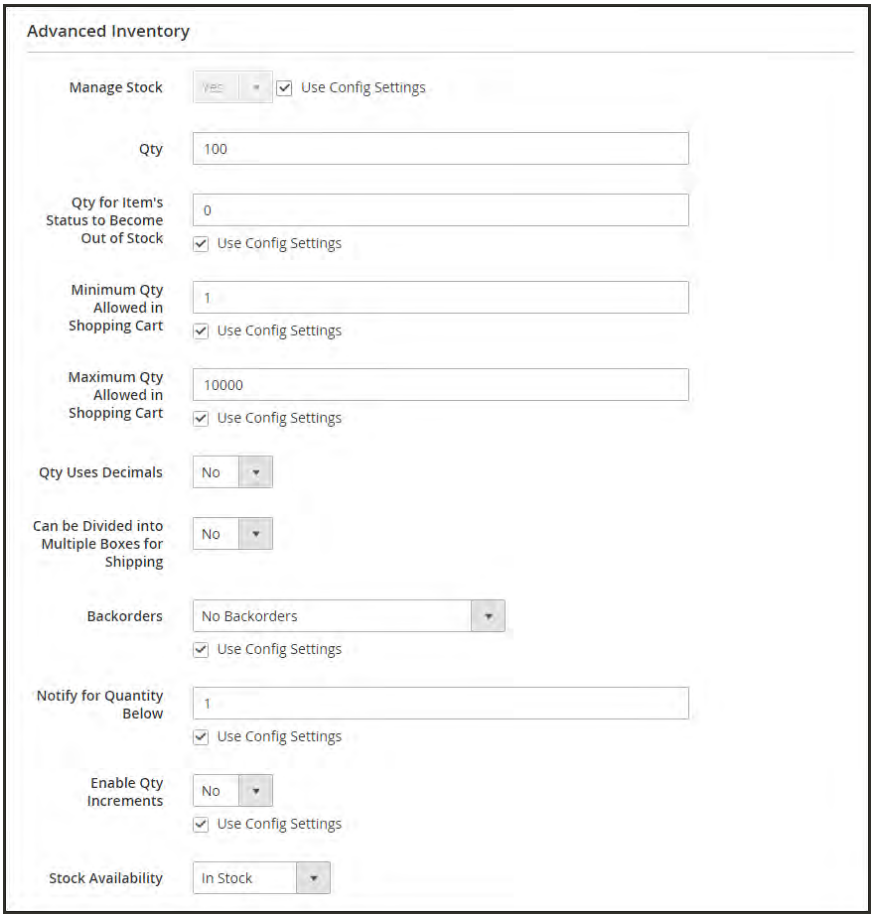
Field Descriptions

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

Method 2: With Stock Management

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Inventory**.
3. Set **Manage Stock** to "Yes." If necessary, clear the **Use Config Settings** checkbox to make the field available. Then, do the following:
   a. Enter the **Qty** currently in stock.
   b. Enter the **Qty for Item's Status to Become Out of Stock**.
   c. Enter the **Minimum Qty Allowed in Shopping Cart**.
   d. Enter the **Maximum Qty Allowed in Shopping Cart**.
4. If the quantity is a decimal value, do the following:
   a. Set **Qty Uses Decimals** to "Yes."
   b. If the quantity purchased **Can be Divided into Multiple Boxes for Shipping**, select "Yes."

5. Set **Backorders** to one of the following:
   - No Backorders
   - Allow Qty Below 0
   - Allow Qty Below 0 and Notify Customer
6. In the **Notify for Quantity Below** field, enter the stock level that triggers a Quantity Below notification.
7. To sell the product in quantity increments, do the following:
   a. Set **Enable Qty Increments** to "Yes."
   b. In the **Qty Increments** field, enter the number of products that must be purchased in an incremental step. For example, if you enter 6, the customer must purchase the product in quantities of 6, 12, 18, and so on.
8. If the product is currently in stock, set **Stock Availability** to "In Stock."
9. When complete, tap **Save**.



Advanced Inventory (Long Form)

Field Descriptions

FIELD	SCOPE	DESCRIPTION
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.
Qty for Item's Status to Become Out of Stock	Global	Determines the stock level at which a product is considered to be out of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Qty Uses Decimals	Global	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.
Can be Divided into Multiple Boxes for Shipping	Global	Determines if parts of the product can be shipped separately. Options: Yes / No

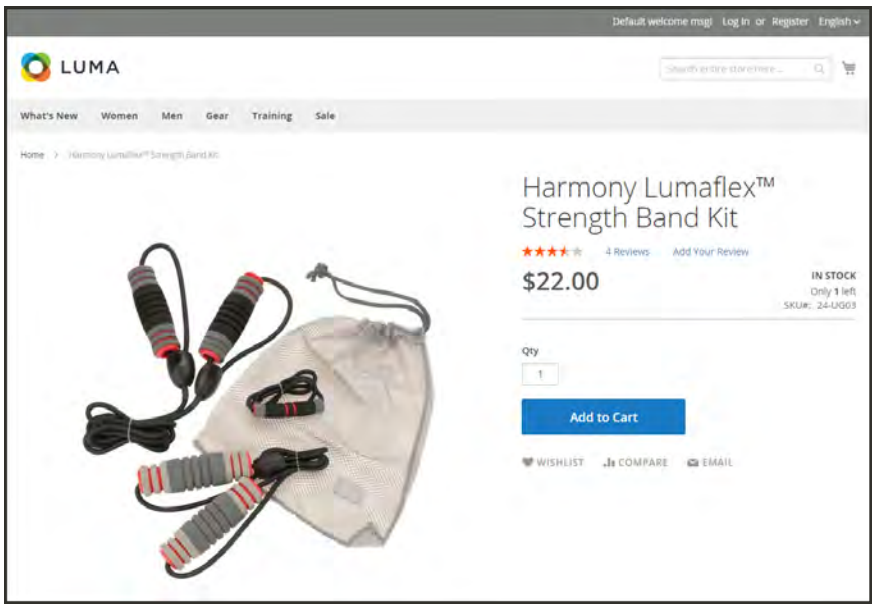
Field Descriptions (cont.)

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

Stock Options

Your catalog can be configured to display the availability of each item as “In Stock” or “Out of Stock,” The configuration setting applies to the catalog as a whole, and the message changes according to the stock status of the product. There are several display variations possible, including how “out of stock” products are managed in the catalog and in product listings.

The out of stock threshold indicates when a product needs to be reordered, and can be set to any number greater than zero. Another way you can use the stock availability threshold is to manage products that are in high demand. If you want to capture new customers, rather than sell to high-quantity buyers, you can set a maximum quantity to prevent a single buyer from taking out your entire inventory.



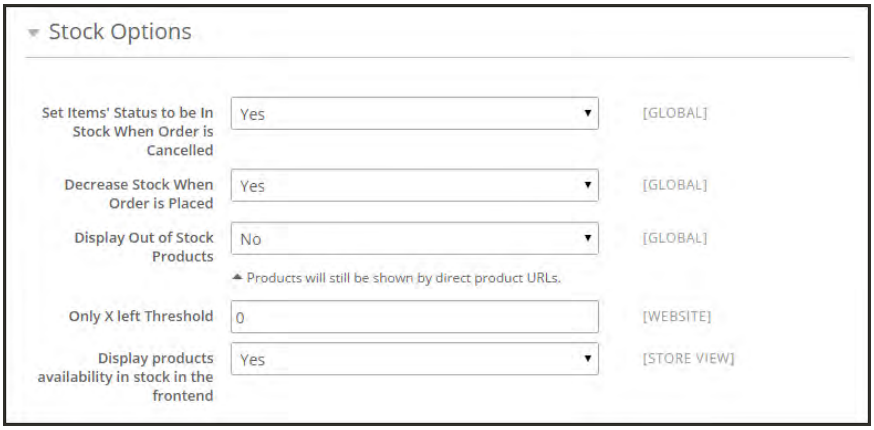
In Stock, Only 1 Left

To configure stock options:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Inventory**.
3. Expand the **Stock Options** section, and do the following:
   a. To return items to stock if an order is cancelled, **Set Items Status to be in Stock When Order in Cancelled** 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 in the frontend** to "Yes."



Stock Options

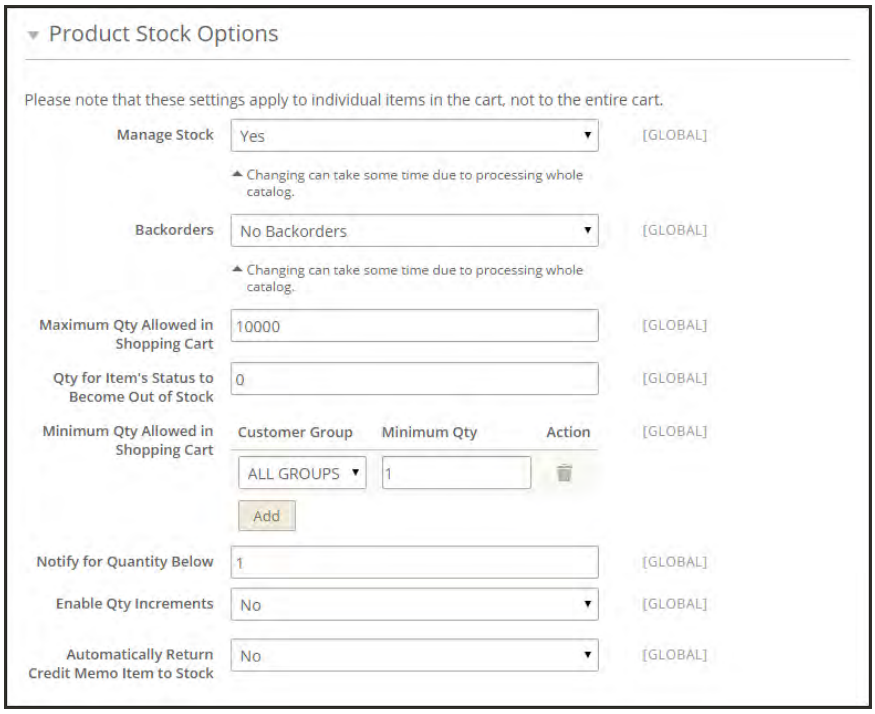
4. When complete, tap **Save Config**.

Product Stock Options

The Product Stock Options configuration determines the default product inventory settings at the product level. The configuration applies to individual products, rather than to the contents of the cart as a whole.

To configure the default inventory settings:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Inventory**.
3. Expand the **Product Stock Options** section, and do the following:
   a. To activate inventory control for your catalog, set **Manage Stock** to "Yes."



Product Stock Options

b. Set **Backorders** to one of the following:

No Backorders	To not accept backorders when product is out of stock.
Allow Qty Below 0	To accept backorders when the quantity falls below zero.
Allow Qty Below 0 and Notify Customer	To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.

c. Enter the **Maximum Qty Allowed in Shopping Cart**.

d. Enter the **Qty for Item's Status to Become Out of Stock.**

e. Enter the **Minimum Qty Allowed in Shopping Cart**.

f. In the **Notify for Quantity Below** field, enter the stock level that triggers notification that the item is out of stock.

g. To activate quantity increments for the product, set **Enable Qty Increments** to "Yes." Then in the **Qty Increments** field, enter the number of the items that must be purchased to meet the requirement. For example, an item that is sold in increments of 6 can be purchased in quantities of 6, 12, 18, and so on.

h. When a credit memo is issued for the item, set **Automatically Return Credit Memo Item to Stock** to "Yes" if you want to return the item to inventory by default.

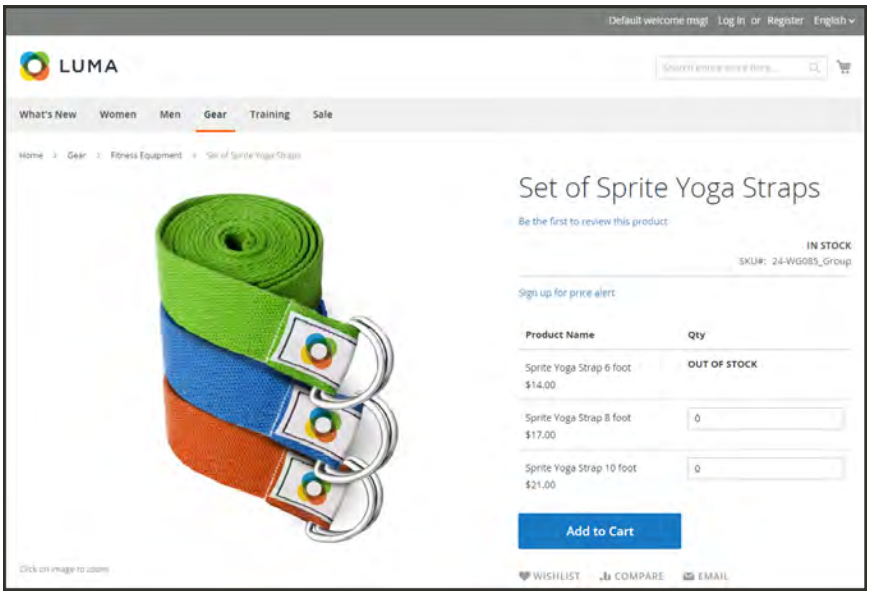
4. When complete, tap **Save Config**.

Stock Message Scenarios

You can use a combination of configuration settings to control stock availability messages on product pages and in listings of products on catalog pages.

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.



Grouped Product with "Out of Stock" Message

Example 1: Show Availability Message

Scenario 1: This combination of settings causes the availability message to appear on the product page, according to the stock availability of each product.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
Product Inventory		
Manage Stock	Yes	
Stock Availability	In Stock Out of Stock	"Availability: In Stock" "Availability: Out of Stock"

Scenario 2: When stock is not managed for a product, this combination of settings can be used to display the availability message on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
Product Inventory		
Manage Stock	No	"Availability: In Stock"

Example 2: Hide Availability Message

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

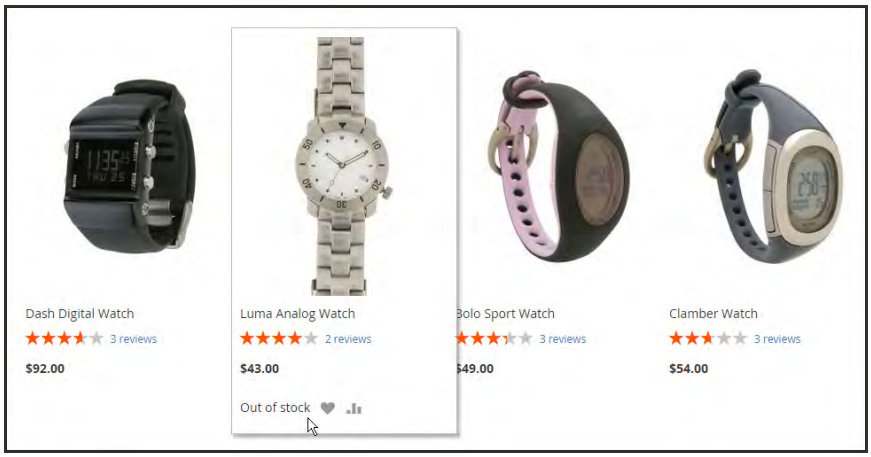
STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
Product Inventory		
Manage Stock	Yes	
Stock Availability	In Stock Out of Stock	None None

Scenario 2: When stock is not managed for a product, this combination of configuration and product settings prevents the availability message from appearing on the product page.

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
Product Inventory		
Manage Stock	No	None

Catalog Page Stock Messages

The following display options are possible for the category and search results lists, depending on the product availability and configuration settings.



"Out of Stock" Message on Category Page

Example 1: Show Product with "Out of Stock Message"

This combination of configuration settings includes out of stock products in the category and search results lists, and displays an "out of stock" message.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	
Display product availability in stock in the frontend	Yes	"Out of stock"
Display Out of Stock Products	Yes	
Display product availability in stock in the frontend	No	None

Example 2: Show Product without "Out of Stock Message"

This combination of configuration settings includes out of stock products in the category and search results lists, but does not display a message.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	None
Display product availability in stock in the frontend	No	

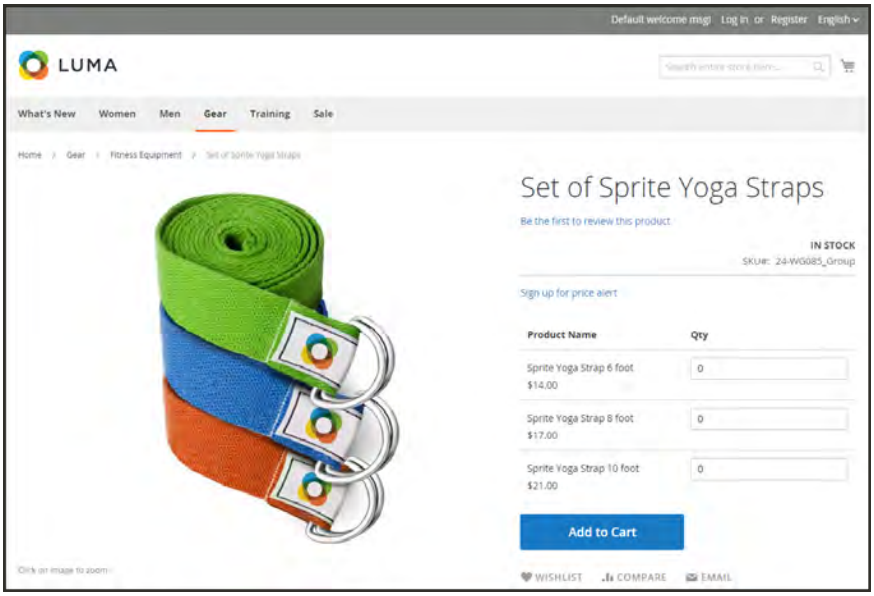
Example 3: Hide Product Until Back in Stock

This configuration setting omits out of stock products entirely from the category and search results lists, until they are back in stock.

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	No	None

Product Alerts

Customers can subscribe to two types of alerts by email: price change alerts and in-stock alerts. For each type of alert, you can determine if customers are able to subscribe, select the email template that is used, and identify the sender of the email.



Sign Up for Price Alert

When price change alerts are enabled, a “Sign up for price alert” link appears on every product page. Customers can click the link to subscribe to alerts related to the product. Guests are prompted to open an account with your store. Whenever the price changes, or the product goes on special, everyone who has signed up to be notified receives an email alert.

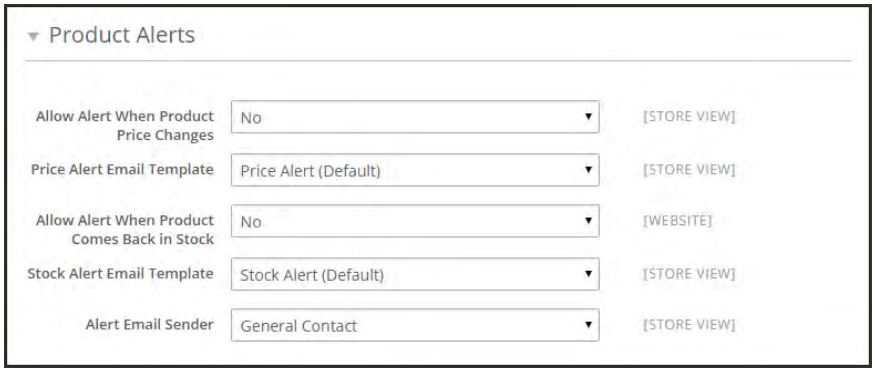
The in-stock alert creates a link called “Sign up to get notified when this product is back in stock” for every product that is out of stock. Customers can click the link to subscribe to the alert. When the product is back in stock, customers receive email notification that the product is available. Products with alerts have a Product Alerts tab in the Product Information panel that lists the customers who have subscribed to an alert.

To set up product alerts:

1. On the Admin sidebar, tap**Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Click to expand the **Product Alerts** section, and do the following:
   a. To offer price change alerts to your customers, set **Allow Alert When Product Price Changes** to "Yes."
   b. Set **Price Alert Email Template** to the template that you want to use for the price alert notifications.
   c. To offer alerts when out-of-stock products become available again, set **Allow Alert When Product Comes Back in Stock** to "Yes."

   > The "Sign up to get notified when this product is back in stock" message appears only when Inventory Stock Options - Display Out of Stock Products is set to "Yes."

   d. Set **Stock Alert Email Template** to the template that you want to use for product stock alerts.
   e. Set **Alert Email Sender** to the store contact that you want to appear as the sender of the email alert.

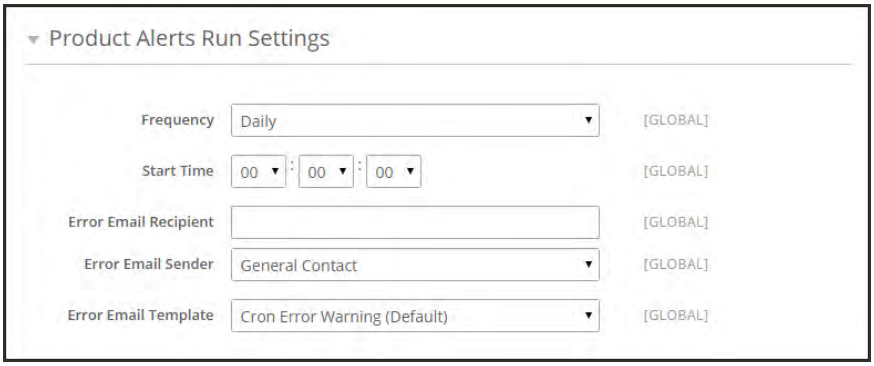


Product Alerts

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

Product Alert Run Settings

These settings enable you to select how often Magento checks for changes that require alerts to be sent. Additionally, you can select the recipient, sender, and template for emails that are sent if the sending of alerts fails.



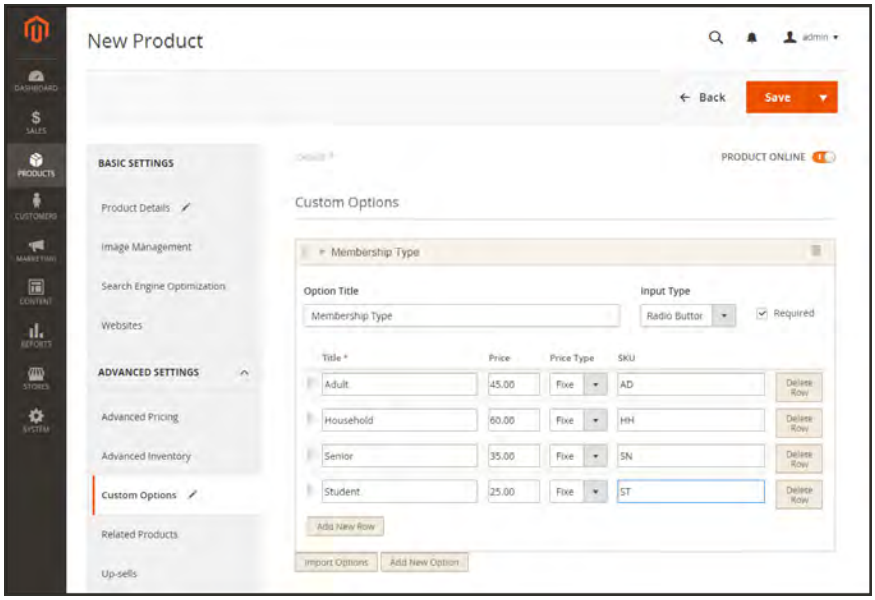
Product Alert Run Settings

To set up product alerts:

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

Custom Options

Adding custom 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. Custom options are a good solution if your inventory needs are simple. However, because custom options are 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 then import the options to the other products.



Custom Options

To create custom options:

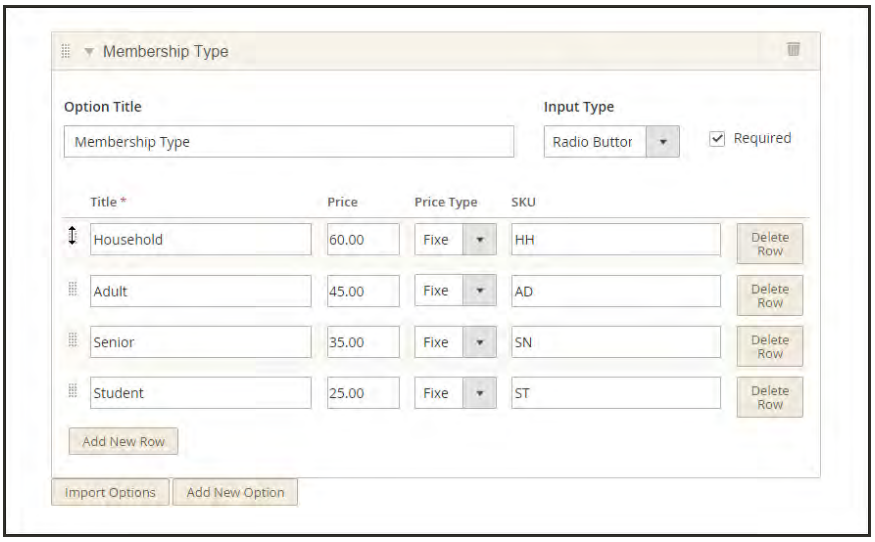
1. Open the product in edit mode.
1. In the panel on the left under **Advanced Settings**, choose **Custom Options**.
2. In the upper-right corner, tap **Add New Options**. Then, do the following:
   a. In the **Option Title** field, enter a name for the option.
   b. Set the **Input Type** for data entry.
   c. If the option is not required to purchase the product, clear the **Required** checkbox.
3. 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 **Sort Order** icon , and drag the option to a new position in the list.



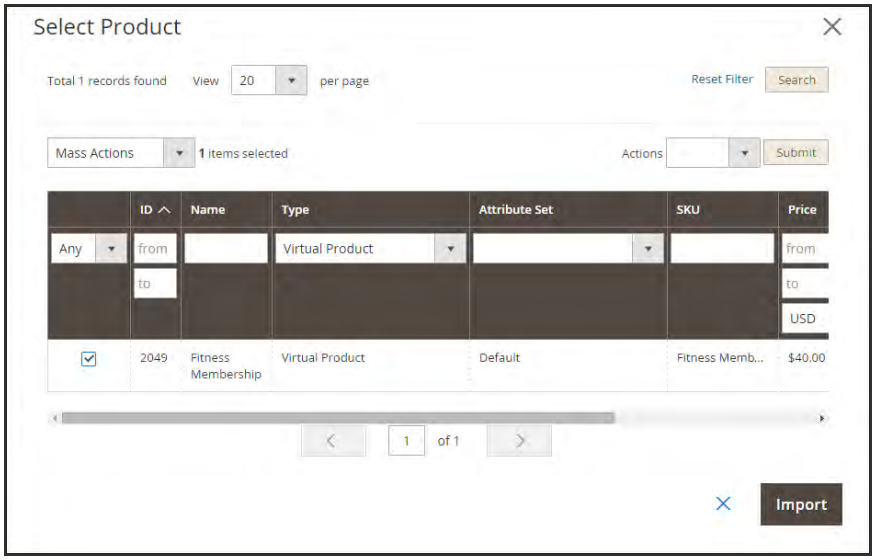
Change Order of Options

f. Repeat this step for each option to be added.

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

To import custom options:

1. In the Custom Options section, tap **Import Options**.
2. In the list, mark the checkbox of the product with the options that you want to import.
3. Tap **Import**.



Importing Custom Options

4. When complete, you can continue to add more custom options, or tap **Save and Close**.

Input Controls

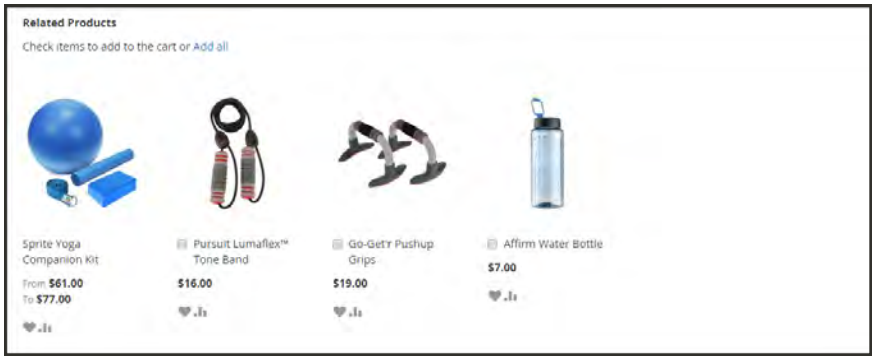
INPUT TYPE	DESCRIPTION
TEXT	
Field	A single line input field for text.
Area	A multiple-line input box for paragraphs of text. You can use the WYSIWYG Editor to format the text with HTML tags, or type HTML directly into the text area.
FILE	
File	A file to be uploaded by the customer.
SELECT	

Input Controls (cont.)

INPUT TYPE	DESCRIPTION
Drop-down	A drop-down list of options. Only one item can be selected at a time.
Radio Buttons	A set of options that allows only one to be selected at a time.
Checkbox	A checkbox is a variation of a yes/no option. If the product has more than one checkbox, multiple selections can be made at the same time.
Multiple Select	A drop-down list of options that accepts multiple selections. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.
DATE	
Date	An input field for a date value. The date can be typed directly into the field, selected from a listm or calendar. The method of input used and format of the date is determined by the Date & Time Custom Options configuration.
Date & Time	An input field for date and time values.
Time	An input field for a time value.

Related Products

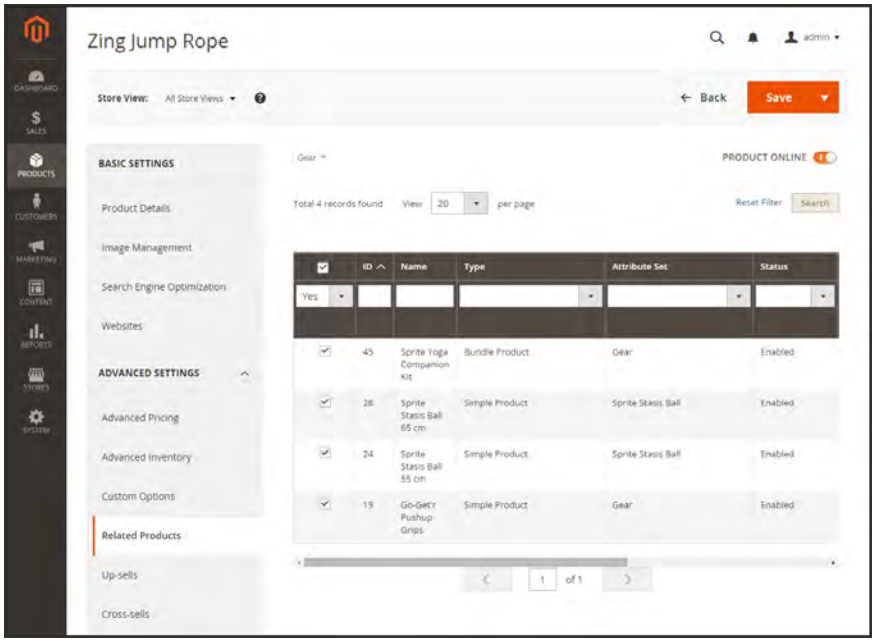
Related products are meant to be purchased in addition to the item the customer is viewing. The customer can place the item in the shopping cart by simply clicking the checkbox. The placement of the Related Products block varies according to theme and page layout. In the example below, it appears at the bottom of the Product View page. With a 2 column layout, the Related Product block often appears in the right sidebar.



Related Products

To set up related products:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Related Products**.

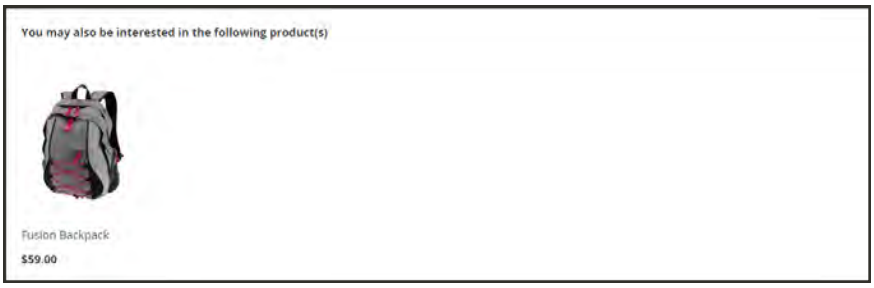


Related Products

3. In the upper-left corner, tap **Reset Filter** to list all the available products, or use the search filters at the top of each column to find specific products.
4. In the list, mark the checkbox in the first column of any product you want to feature as a related product.
5. When complete, tap **Save**.

Up-sells

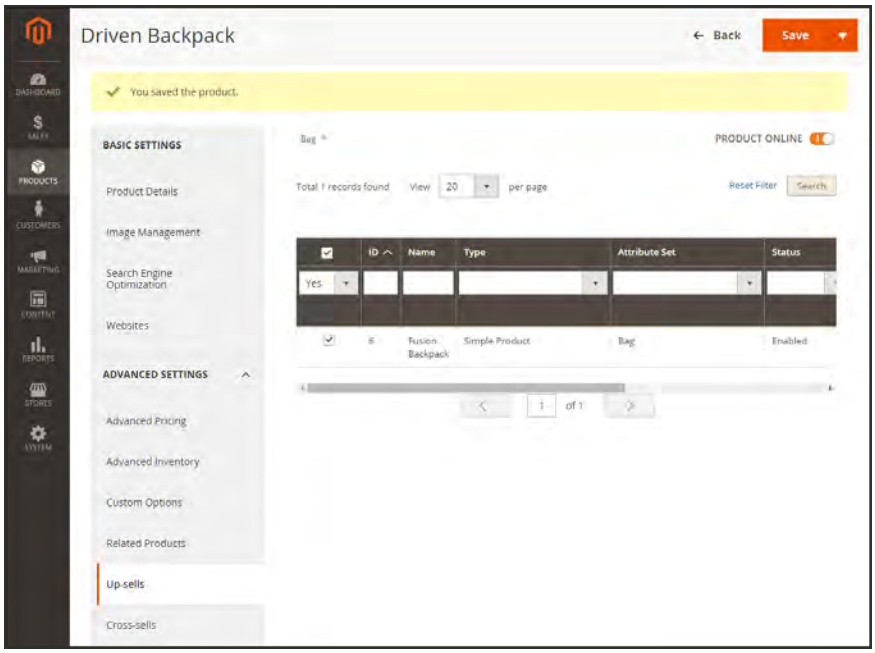
Up-sell products are items that your customer might prefer instead of the product currently considered. An item offered as an up-sell might be of a higher quality, more popular, or have better profit margin. Up-sell products appear on the product page under a heading such as, "You may also be interested in the following product(s)."



Upsell

To select up-sell products:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Up-sells**.

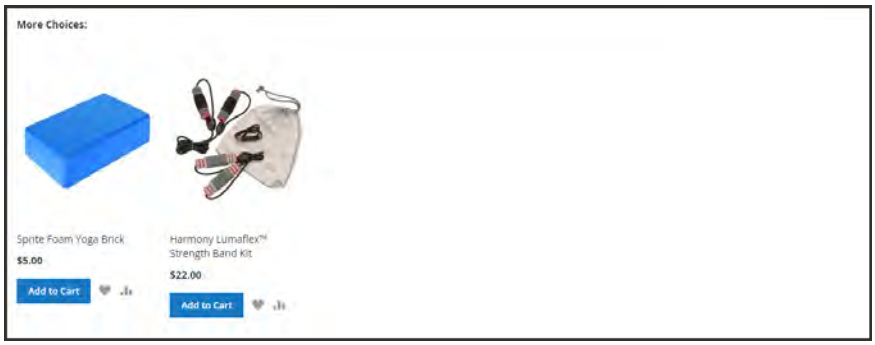


Upsell Product

3. Tap **Reset Filter** to list all the available products, or use the search filters at the top of each column to find specific products.
4. In the list, mark the checkbox in the first column of each product you want to feature as an up-sell.
5. When complete, tap **Save**.

Cross-sells

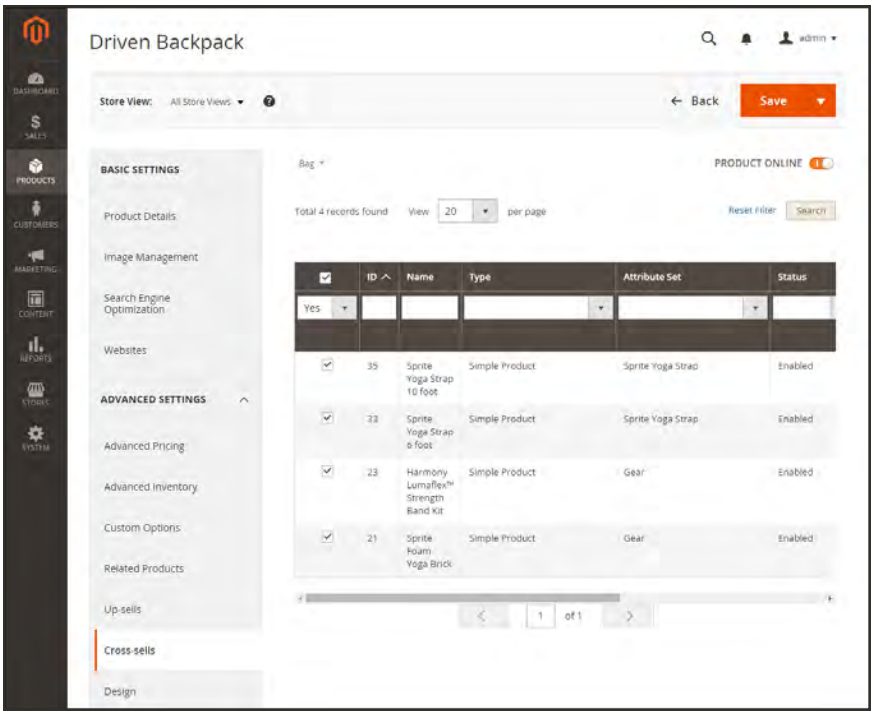
Cross-sell items are similar to impulse purchases positioned next to the cash register in the checkout line. Products offered as a cross-sell appear on the shopping cart page, just before the customer begins the checkout process.



Cross-sells in Shopping Cart

To set up cross-sell products:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Cross-sells**.

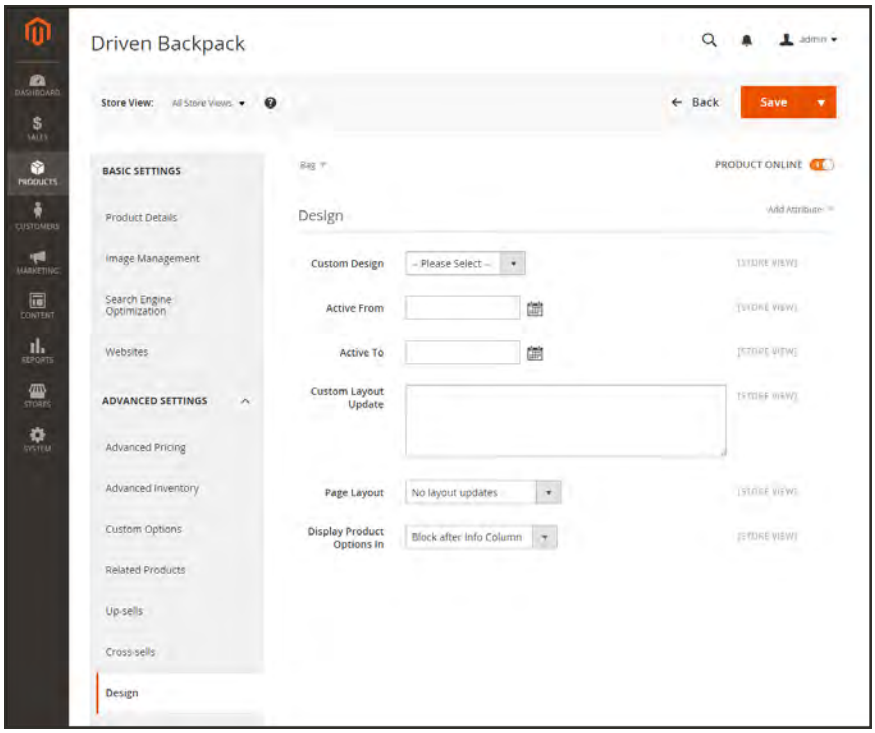


Cross-sell Products

3. Tap **Reset Filter** to list all the available products, or use the search filters at the top of each column to find specific products.
4. In the list, mark the checkbox in the first column of any product you want to feature as a cross-sell for the product
5. When complete, tap **Save**.

Design

The product Design settings give you the ability to apply a different theme to the product page, and update the XML code that controls the page layout.



Design

Field Descriptions

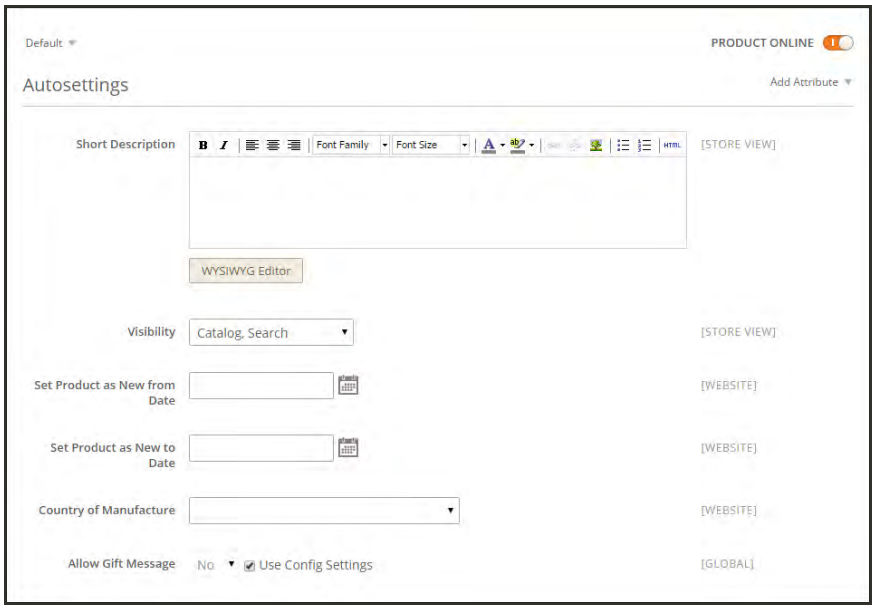
FIELD	SCOPE	DESCRIPTION
Custom Design	Store View	To apply a custom theme, select the one you want from the list of available themes.
Active From	Store View	If applying a custom theme for a period of time, enter the beginning date, or select the date from the Calendar.
Active To	Store View	If applying a custom theme for a period of time, enter the ending date, or select the date from the Calendar.
Custom Layout Update	Store View	You can further customize the theme with XML coding.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION	
Page Layout	Store View	To apply a different layout to the product page, select one of the following:	
		No layout updates	This option is preselected by default and does not apply layout changes.
		Empty	This option lets you define your own layout, such as a 4-column page. Requires an understanding of XML.
		1 column	Applies the 1-column layout.
		2 columns with left bar	Applies the 2 column layout.
		2 columns with right bar	Applies the 2-columns with right bar layout.
		3 columns	Applies the 3 column layout.
Display product options in	Store View	Options include: Product Info Column / Block after Info Column	

Autosettings

The Autosettings page includes attributes that are dependencies for other operations. For example, the Set Product as New From/To values determine if the product appears in the "New Products" block on the home page. You can use the default values for all of these fields, or change them as needed.



Autosettings

Field Descriptions

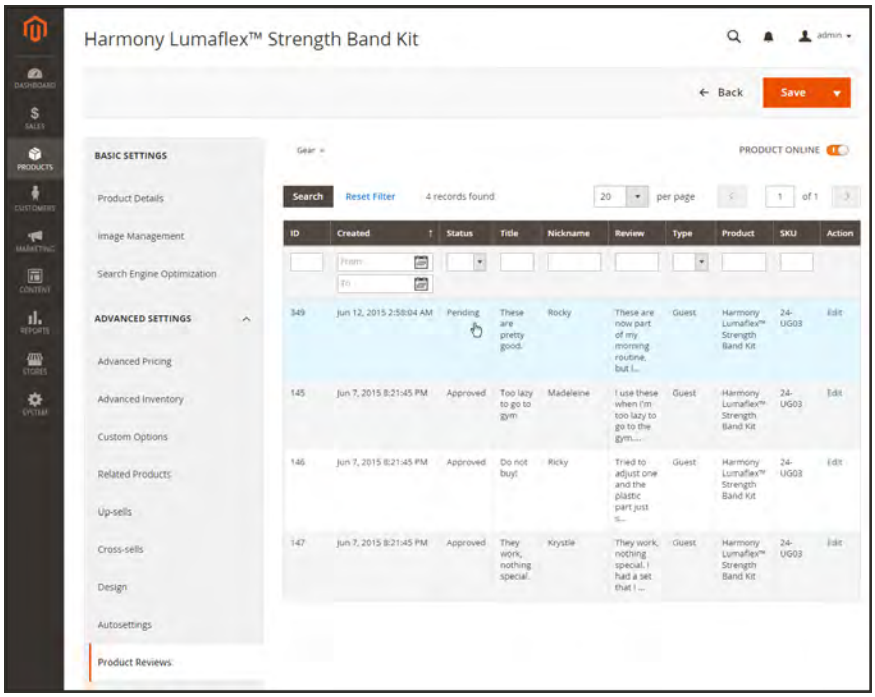
FIELD	SCOPE	DESCRIPTION
Short Description	Store View	Provides a summary of the product description that might appear on catalog pages, depending on theme. It can also be used instead of the full description for product RSS feeds that are sent to shopping sites.
WYSIWYG Editor		Opens the editor in a popup window.
Visibility	Store View	Determines the level of visibility the product has throughout the store. Options: Not visible individually Catalog Search Catalog, Search

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Set Product as New from Date	Website	Sets the first date the product will be featured in the “New Product” block on the home page. The date can be typed in the box, or selected from the calendar.
Set Product as New to Date	Website	Sets the last date the product will be featured in the “New Product” block on the home page. The date can be typed in the box, or selected from the calendar.
Country of Manufacture	Website	Identifies the country where the product was manufactured.
Allow Gift Message	Global	Determines if a gift message can be added to an order. Clear the checkbox to override the default setting. Options: Yes / No

Product Reviews

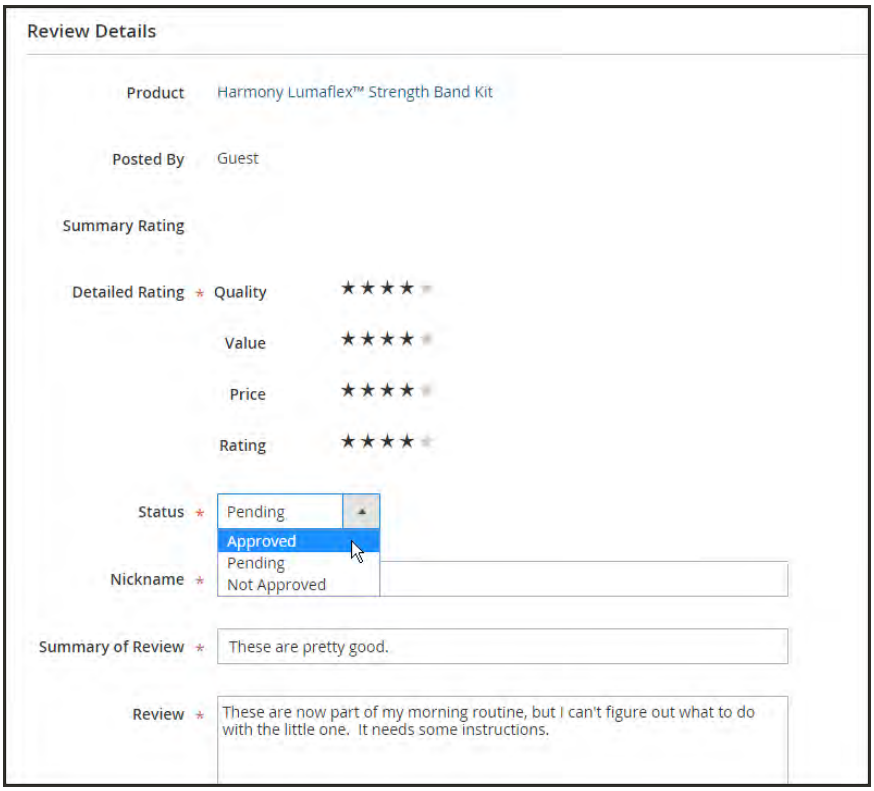
The Product Reviews page displays all reviews for the product. Reviews can be moderated and edited in the same manner as from the Review page. To learn more, see: Product Reviews.



Product Reviews

To moderate a review:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Product Reviews**.
3. Find a review with a status of “Pending,” and open the record in edit mode.
4. Edit the text of the review, as needed.
5. Do one of the following:
   - To approve the review, set **Status** to “Approved.”
   - To reject a review, set **Status** to “Not Approved.”



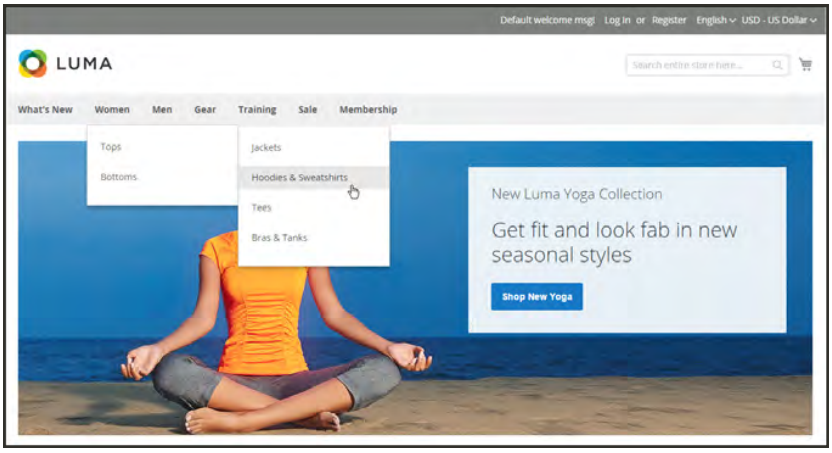
Approving a Review

6. When complete, tap **Save Review**.

CHAPTER 14:

Categories

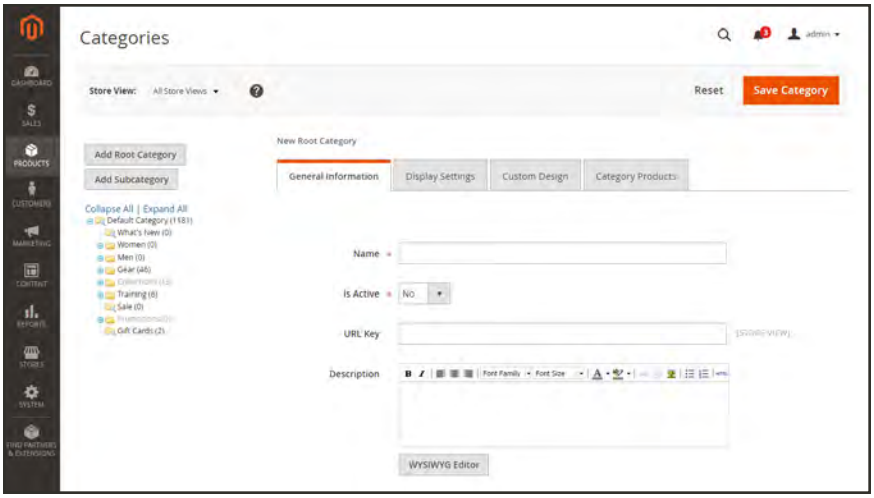
Before you add products to your catalog, you must first establish the basic category structure of your catalog. Every product in your catalog must be assigned to at least one category. The top navigation of your store reflects the category structure of your catalog.



Categories in Top Navigation

Creating Categories

The category structure of your catalog is represented as 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. Categories can be dragged and dropped to other locations in the tree, and each category has an ID number in parentheses after the category name at the top of the page.



Category Tree

Process Overview:

Step 1: Create a Category

Step 2: Complete the General Information

Step 3: Complete the Display Settings

Step 4: Add Products to the Category

Step 1: Create a Category

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. 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."
3. Tap **Add Subcategory**.

Step 2: Complete the General Information

1. On the General Information tab, do the following:
   a. (Required) Enter the **Name** of the category.
   b. (Required) To enable the category, set **Is Active** to "Yes."
   c. You can enter a **URL Key** for the category, or let the system automatically create one that is based on the category name.
2. In the **Description** box, enter a paragraph or two of descriptive text for the category landing page.
3. To display an **Image** at the top of the category landing page, tap **Choose File**, and choose the image to upload.
4. Complete the following category meta data:
   - Page Title
   - Meta Keywords
   - Meta Description
5. (Required) To include the category in the main menu, set **Include in Navigation Menu** to "Yes."
6. Tap **Save Category**.

Step 3: Complete the Display Settings

You can configure the category landing page to display both a static block and product list, or one or the other. A static block can provide additional information, including text, images, and even embedded video.

1. On the **Display Settings** tab, do the following:

   a. Set **Display Mode** to one of the following:

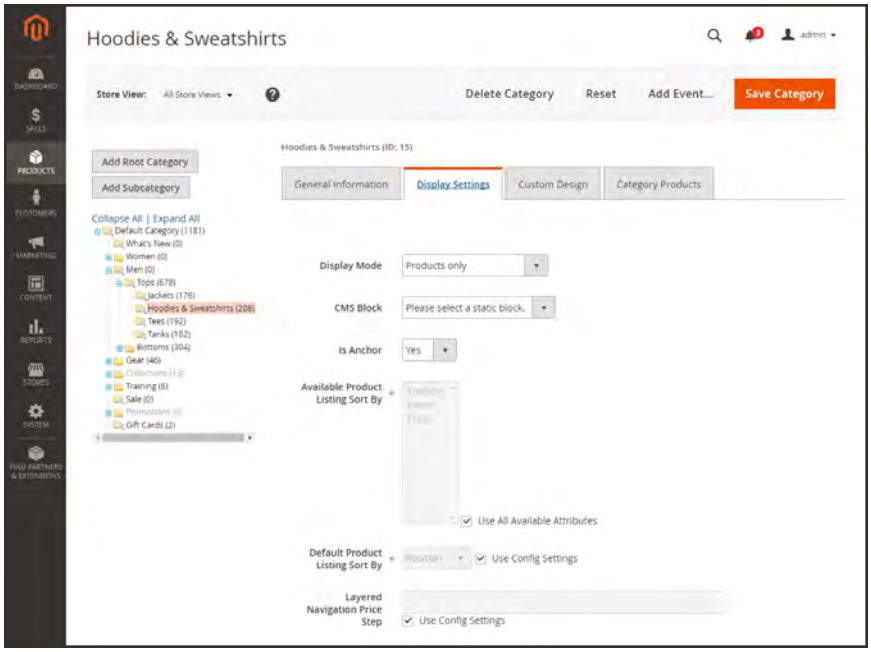
      - Products Only
      - Static Block Only
      - Static Block and Products

   b. If applicable, set **CMS Block** to the static block that you want to appear on the category page.

   c. If you want this category page to display the "Filter by Attribute" section of layered navigation, set **Is Anchor** to "Yes."

   d. Clear the checkbox under **Default Product Listing Sort By**. Then select one of the available values to sort the list. By default, all available attributes are listed. The default values typically include:

      - Best Value
      - Name
      - Price

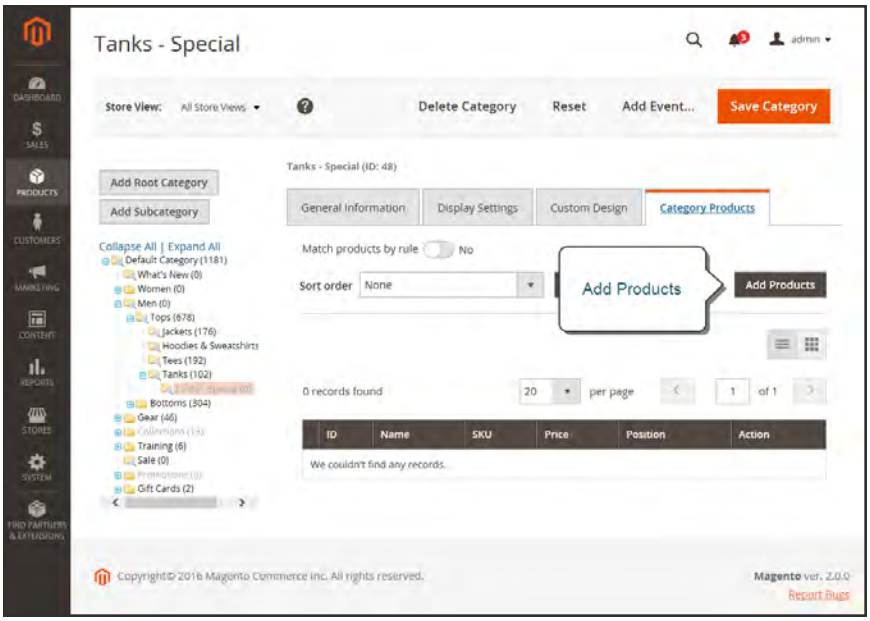


Display Settings

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

Step 4: Add Products to the Category

3. On the **Category Products** tab, tap **Add Products**.



Add Products

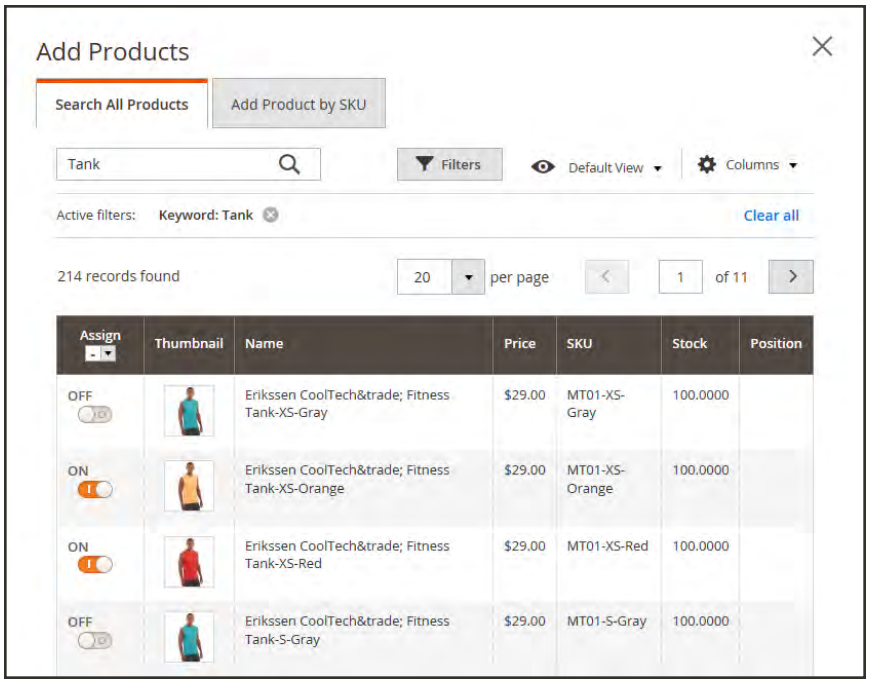
4. On the **Search All Products** tab, do the following:

   a. Use the grid controls as needed to sort, filter, or paginate the list.

   b. Use one of the following methods to choose the products that you want to add to the category:

Method 1: Add Products Individually

In the first column, set the **Assign** switch to the "ON" position for each product to be added.

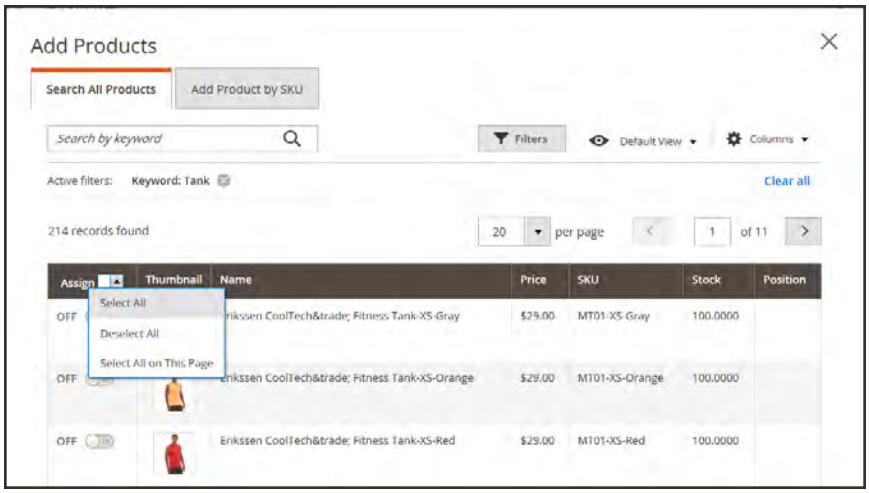


Add Individual Products

Method 2: Assign Multiple Products

In the first column, set the **Assign** control to one of the following:

- Select All / Deselect All
- Select All on This Page / Deselect All on This Page



Method 3: Add Products by SKU

1. Prepare a list of the SKUs that you want to add to the category.

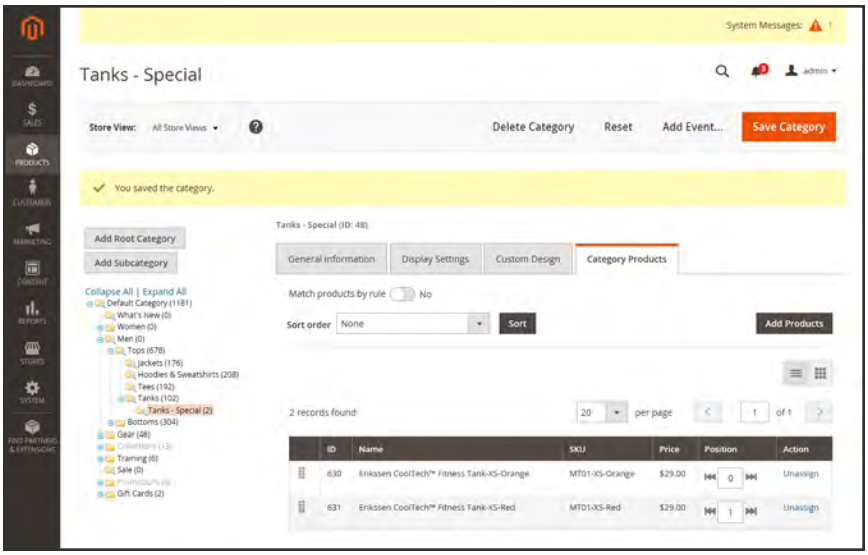
2. Open the category in edit mode. Then, choose the **Add Product by SKU** tab.
3. In the box, enter each SKU that you want to add on a separate line.

Add by SKU

4. Wait until the SKUs have been added. Then, tap **Save and Close**.

The products now appear in the category product grid.

5. When prompted click the message at the top of the workspace, and update any invalid indexers.



Workspace Controls

CONTROL	DESCRIPTION
	The “ON” position. indicates that the product is assigned to the category.
	The “OFF” position indicates that the product is not assigned to the category.

List Controls

FIELD	DESCRIPTION
Select All	The filter control at the top of the first column determines the type of search, and can be set to list any record, or only those that are either assigned or not assigned to the category. The checkbox in the first column identifies products to be added to the category. Options: Yes / No / Any
Search Filters	The filter controls at the top of each attribute column can be used to enter specific values you want to either include or omit from the list, depending on the Select All setting.
Reset Filter	Clears all search filters.
Search	Searches the catalog based on the filter criteria, and displays the result.

Modifying Categories

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 edit a category:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. Drill down through the category tree, and click the category that you want to edit.
3. Make the necessary changes to the properties on any of the following tabs:
   - General Information
   - Display Settings
   - Custom Design
   - Category Products
4. When complete, tap **Save Category**.

To move a category:

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:

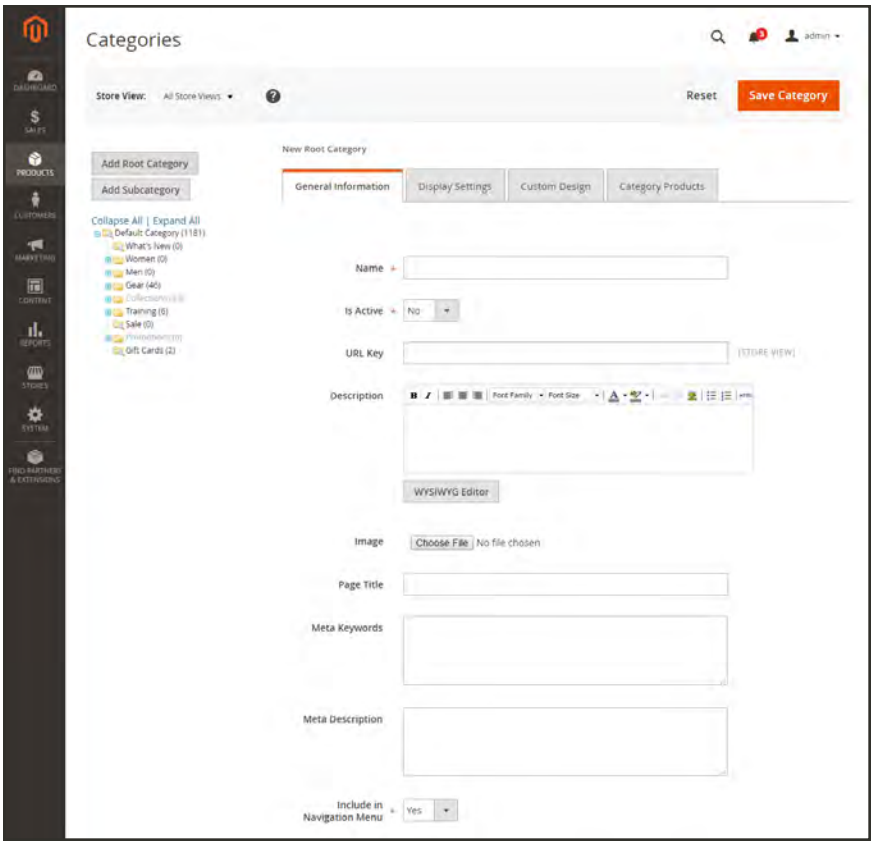
1. Drill down through the category tree, and click the category that you want to delete.

   A deleted category cannot be restored, so make sure that you have selected the correct category before proceeding.

2. Tap **Delete Category**. Then when prompted to confirm, tap **OK**.

Root Categories

The category structure is like an upside-down tree, with the root on top. All categories in your catalog 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. Cart price rule conditions can be based on any category that is a child of the store's root.The root category is not visible to customers in the store, and does not have a URL key.



New Root Category

Process Overview:

Step 1: Create a New Root Category

Step 2: Add Subcategories to the New Root

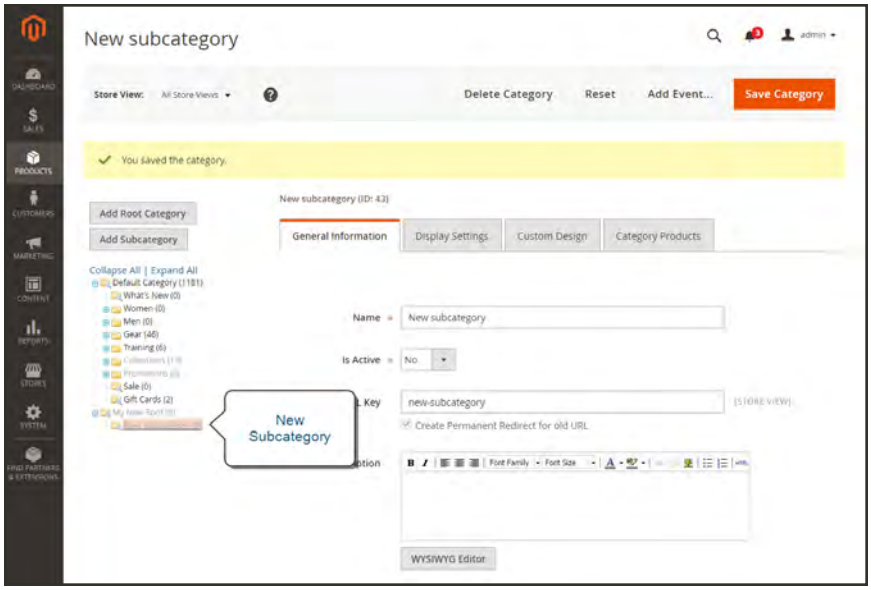
Step 3: Apply the New Root Category to Your Store

Step 1: Create a New Root Category

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. Tap **Add Root Category**.
3. On the **General Information** tab, do the following:
   a. Enter a **Name** for the root category.
   b. Set **Is Active** to "Yes."
   c. Enter the **URL Key** for the root category.
   d. Enter a **Description** of the root category.
   a. To upload an **Image** for the category, tap **Choose File** and select the image.
   b. Complete the following meta data:
      - Page Title
      - Meta Keywords
      - Meta Description
   c. If you want this root category to be in the main menu, set **Include in Navigation Menu** to "Yes."
4. On the **Display Settings** tab, set **Is Anchor** to "Yes."
5. When complete, tap **Save Category**.

Step 2: Add Subcategories to the New Root

1. In the category tree on the left, select the new root category that you created in the last step.
2. Tap **Add Subcategory**.
3. Enter a **Name** for the subcategory.
4. Set **Is Active** to "Yes."
5. Tap **Save Category**.
6. Repeat this process to create as many subcategories as needed.



New Root with Subcategory

Step 3: Apply the New Root Category to Your Store

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **All Stores**.
2. On the Stores page, under Store, tap the **Main Website Store** link.
3. Set **Root Category** to the new root category.
4. When complete, tap **Save Store**.

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.

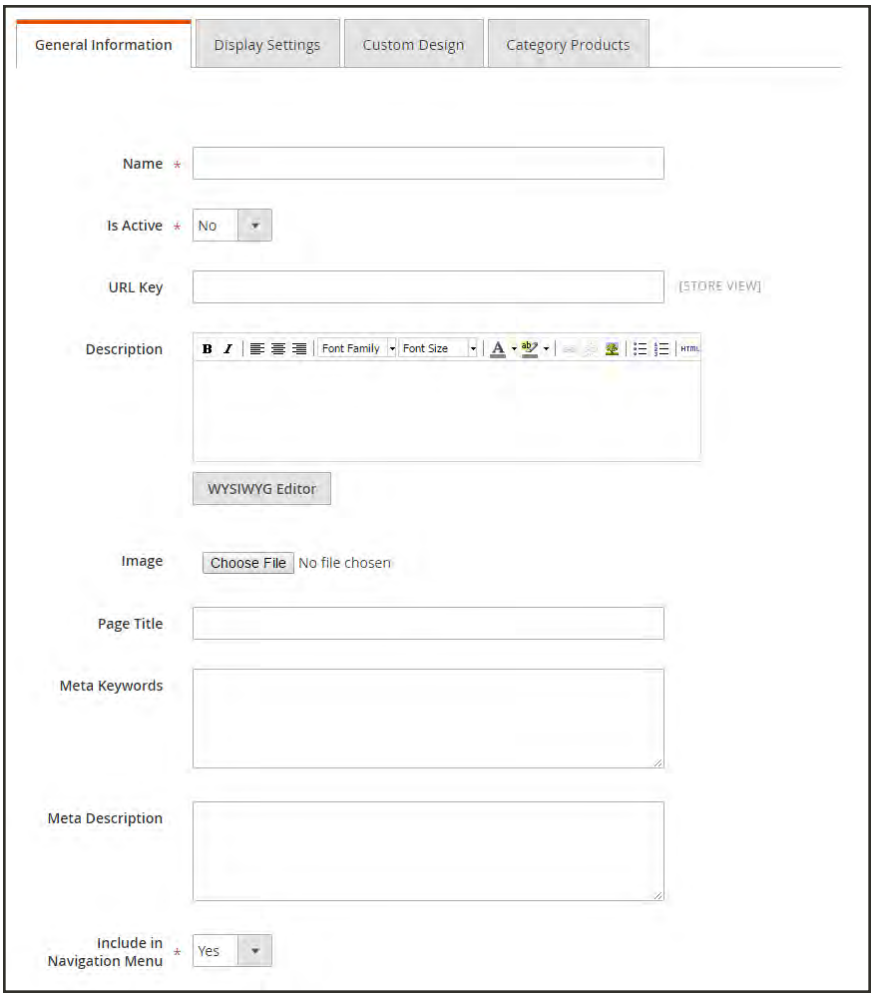
To create hidden categories:

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. In the category tree, select the category you want to hide.
3. On the **General Information** tab, do the following:
   a. Set **Is Active** to "No."
   b. Set **Include in Navigation Menu** to "No."
4. On the **Display Settings** tab, set **Is Anchor** to "No."
5. Although the category is hidden, you can still create additional subcategories beneath it, and make them active. Complete the following settings for each hidden subcategory:
   a. On the **General Information** tab, set **Is Active** to "Yes."
   b. On the **Display Settings** tab, set **Is 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 navigation menu.
6. When complete, tap **Save Category**.

General Information

The General Information tab contains the basic information about the category. You can activate the category, enter meta data to improve the way the category is indexed by search engines, define the URL key, and include the category in the main menu.



General Information

Field Descriptions

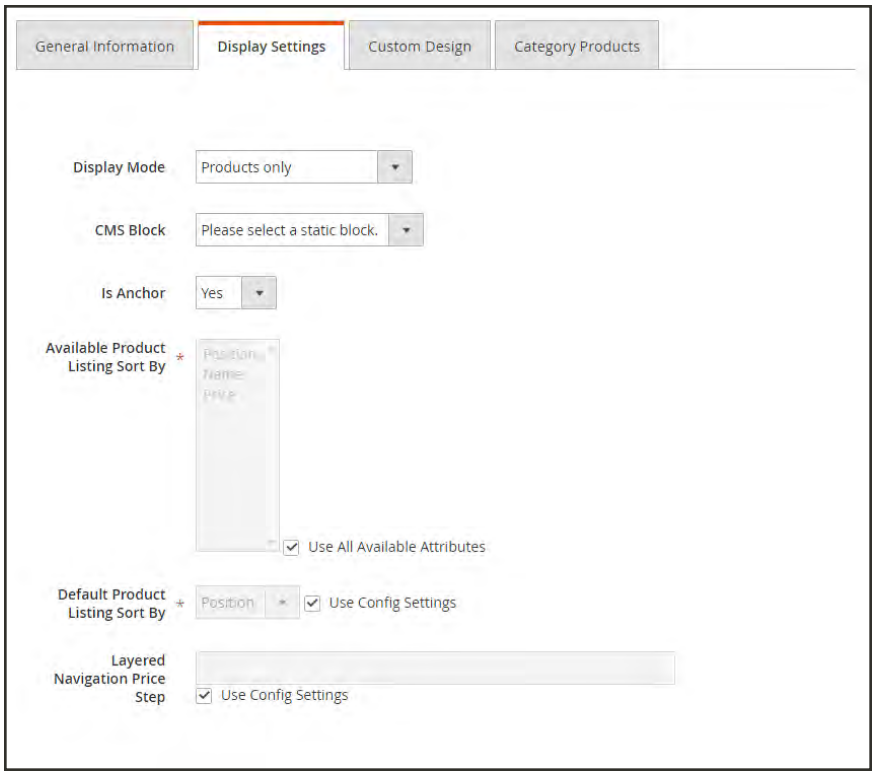
FIELD	DESCRIPTION
Name	(Required) The category name appears in the navigation, and also in the URL key of the category page and associated product pages.
Is Active	(Required) To make this category available, select “Yes.” Options: Yes / No
URL Key	The URL Key is a relative path to the category, and is automatically generated when the category is saved. The URL Key must be all lower-case characters, with no spaces. As a best practice, each word is separated by a hyphen. If you edit the default URL key, a custom redirect is created automatically. A root category does not have a URL key.
Thumbnail Image	If supported by your theme, a thumbnail image can be associated with each category and appear as part of the option in the main menu of the store.
Description	The category description, if used, appears below the category image- and before the product list.
WYSIWYG Editor	
Image	The category image, if used, appears at the top of the category page, before the description and product list. As an alternative, you can display a CMS static block in place of the description and image. (See Category Display Settings.)
Choose File	
Page Title	The category page title appears in the browser tab and title bar. As a best practice, the title should be not more than twelve words in length, and should include a combination of primary and secondary keywords.
Meta Keywords	Keywords are used by some search engines, and not by others. You can use a keyword search tool to identify high value keywords that relate to your category. A general rule is to use no more than thirty keywords, or 180 characters. Avoid repeats, and empty words such as “a,” “an,” “or” and “that.”

Field Descriptions (cont.)

FIELD	DESCRIPTION	
Meta Description	Enter a description of the category, using approximately twenty-five words or 150 characters.	
Include in Navigation Menu	(Required) Determines if the category is included in the main menu. Options include:	
	Yes	Include this category in the top navigation, select “Yes.”
	No	Hides the category, although it is active. Hidden categories do not appear in the top navigation, but are included in layered navigation.

Display Settings

The Display Settings determine which content elements appear on a category page and the order in which products appear. You can enable CMS blocks, set the anchor status of the category, and manage sorting options from the Display Settings tab.



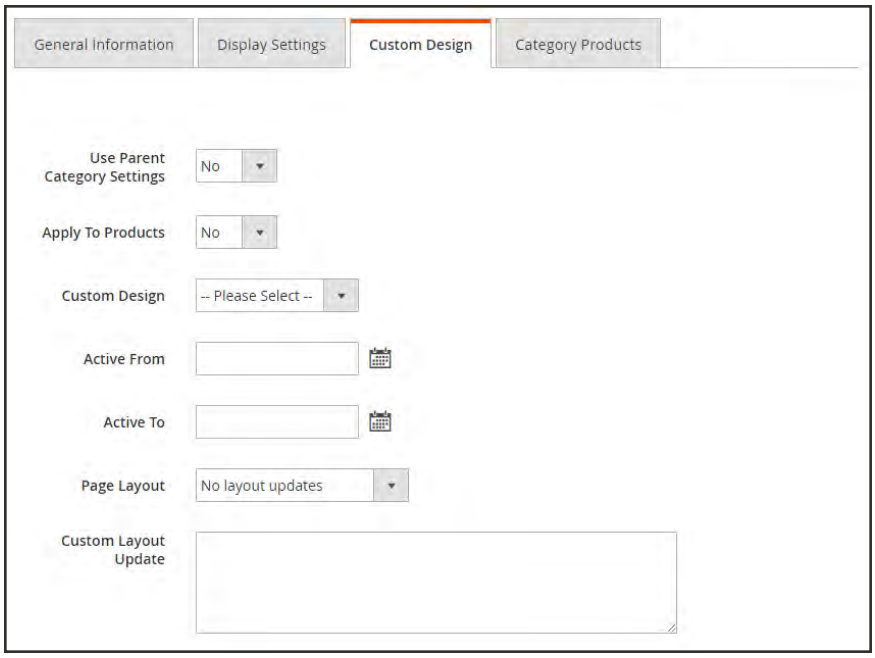
Display Settings

Field Descriptions

FIELD	DESCRIPTION
Display Mode	Determines the content elements displayed on the category page. Options: Products Only Static Block Only Static Block and Products
CMS Block	To display a CMS static block at the top of the category page, select the name of the block from the list.
Is Anchor	When set to “Yes,” includes the “filter by attribute” section in the layered navigation. Options: Yes / No
Available Product Listing Sort By	(Required) The default values are Position, Name, and Price. To customize the sorting option, clear the Use All Available Attributes checkbox and select the attributes you want to use. You can define and add attributes as needed.
Default Product Listing Sort By	(Required) To define the default “Sort By” option, clear the “Use Config Settings” checkbox and select an attribute.
Layered Navigation Price Step	By default, Magento displays the price range in increments of 10, 100, and 1000, depending on the products in the list. To change the Price Step range, clear the “Use Config Settings” checkbox.

Custom Design

The Custom Design tab 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.



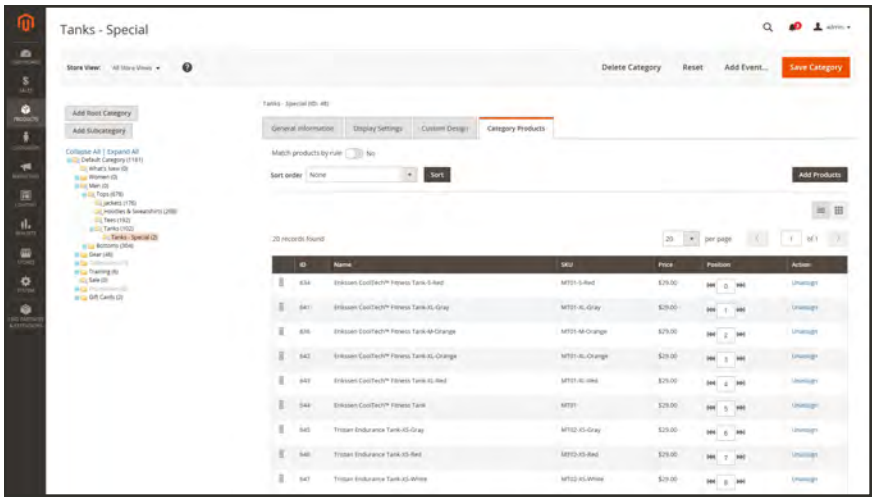
Custom Design

Field Descriptions

FIELD	DESCRIPTION
Use Parent Category Settings	Allows the current category to inherit the design settings from the parent category. Options: Yes / No
Apply to Products	Applies the custom settings to all products in the category. Options: Yes / No
Custom Theme	Applies a custom theme to the category.
Active From	The beginning of a date range that specifies the first day the theme is to be used in the store. The date can be entered or selected from the calendar.
Active To	The end of a date range that specifies the last day the theme is to be used in the store. The date can be entered or selected from the calendar
Page Layout	Applies a different layout to the category page. Options: No layout updates — Pre-selected by default, and does not apply layout changes to the category page. Empty — Use to define your own page layout. (Requires an understanding of XML.) 1 column — Applies a one-column layout to the category page. 2 columns with left bar — Applies a two-column layout with a left sidebar to the category page. 2 columns with right bar — Applies a two-column layout with a right sidebar to the category page. 3 columns — Applies a three-column layout to the category page.
Custom Layout Update	Updates the theme layout with custom XML code.

Category Products

The Category Products tab lists all products that are currently assigned to the category, and includes the advanced capabilities of Visual Merchandiser. You can use the buttons in the upper-right corner to view the products as a list, or as tiles in a grid.



Category Products Viewed as a List

Workspace Controls

CONTROL	DESCRIPTION
	View as List
	View as Tiles
No Yes	Match by Rule
	Drag to New Position
0	Change Position
	Remove from Category
20 per page	View Per Page
1 of 1	Go To Next / Previous Page

Sorting Category Products

The position of products in a category can be specified manually by dragging and dropping products into position, or by applying a predefined sort order. By default, products can be sorted by stock level, age, color, name, SKU, and price. Automatic sort overrides the current sort order, and resets any drag-and-drop positions that were set manually. The sort order of colors and the minimum stock level that can be required for products to be included in the list are set in the Visual Merchandiser configuration.

You can set up the category options separately for each store view to determine the selection of products, their relative position in the list, and the attributes that are available for category rules.

Process Overview:

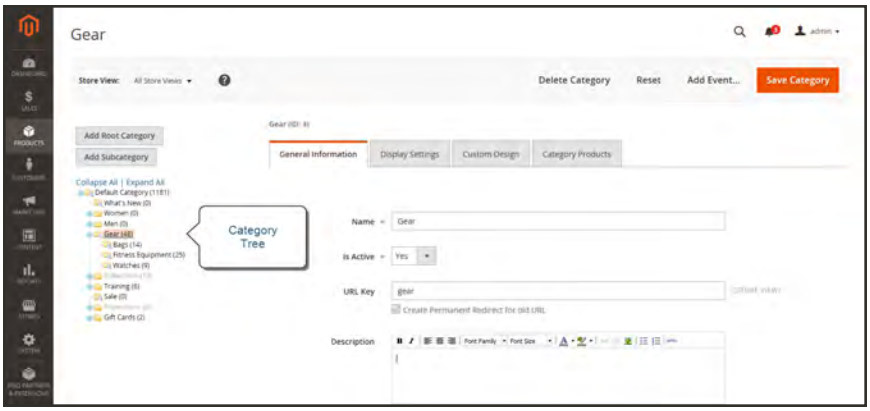
Step 1: Set the Scope of the Configuration

Step 2: Sort the Products

Step 3: Save, Refresh, and Verify

Step 1: Set the Scope of the Configuration

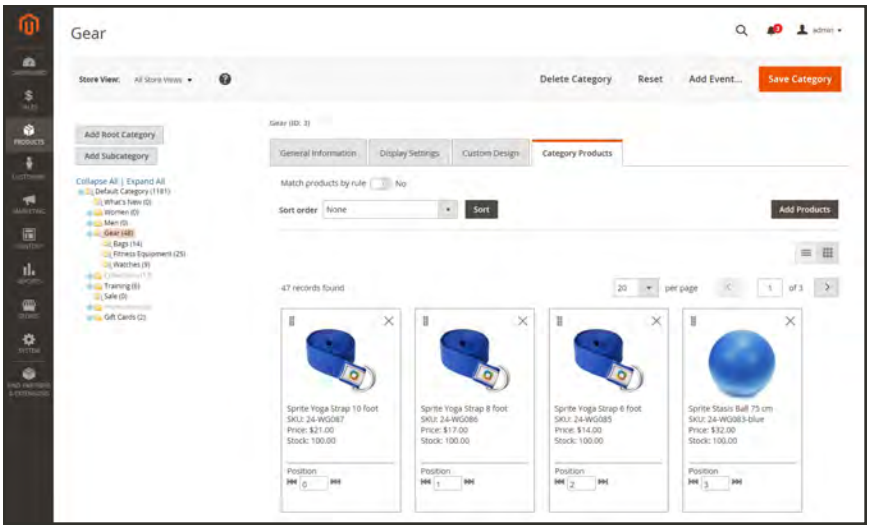
1. On Admin sidebar, choose **Products**. Then under **Inventory**, choose **Categories**.
2. If necessary, choose the **Store View** where the settings apply.
3. In the category tree on the left, choose the category that you want to edit.



Category Tree

Step 2: Sort the Products

1. On the **Category Products** tab, tap the tiles button to show the product tiles in a grid.
2. Use one of the following methods to sort the products:

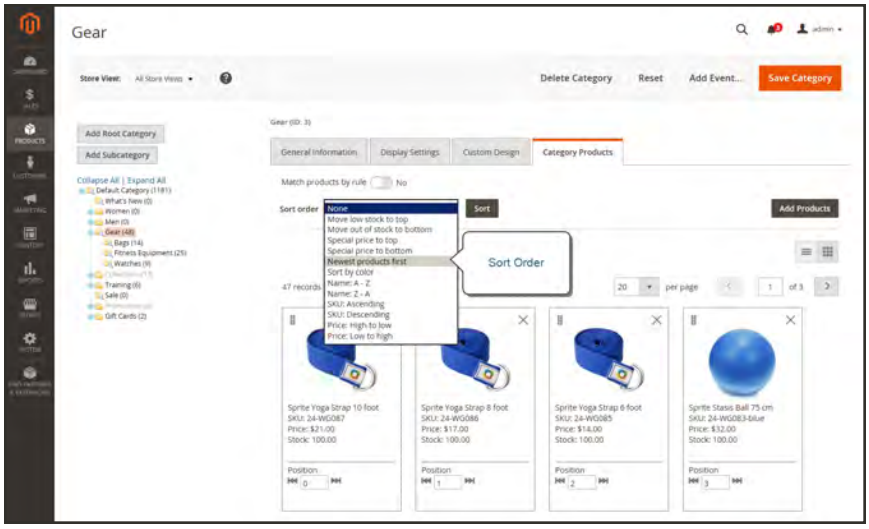


Product Tiles

Method 1: Manual Sort

1. Set **Sort Order** to your preference.

2. Tap **Sort** to apply the new sort order.



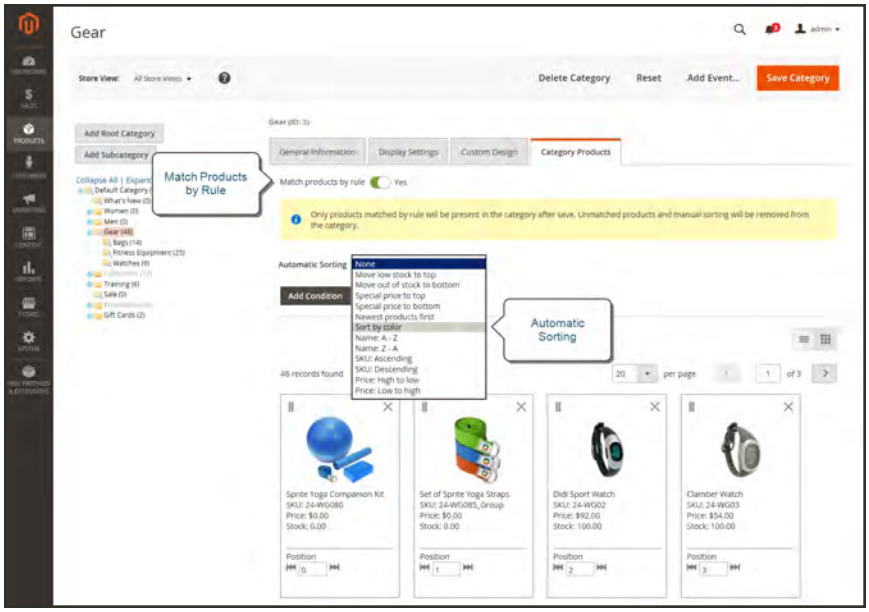
Sort Order

3. To save the sort order, tap **Save Category**.

4. When prompted, update any invalid indexers.

Method 2: Automatic Sort

1. Set **Match products by rule** to "Yes."



Match Products by Rule

2. Set **Automatic Sorting** to your preference.

3. Tap **Sort** to change the order of the list.

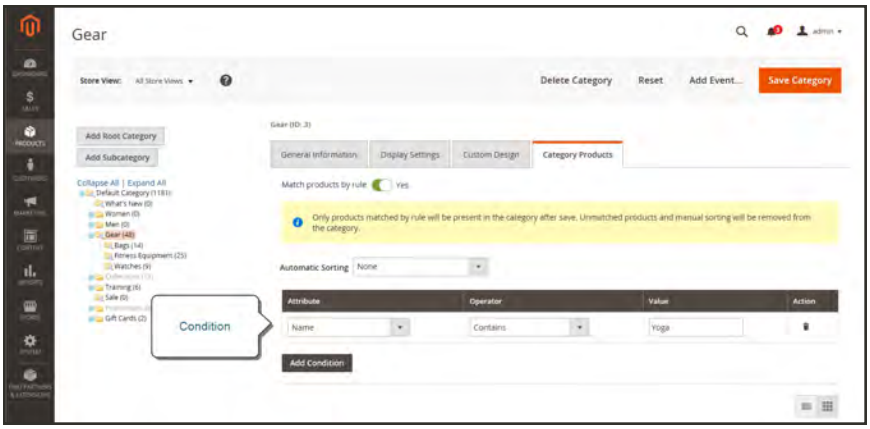
4. To save the sort order, tap **Save Category**.

3. When prompted, update any invalid indexers.

Step 3: Create a Category Rule

1. Set **Match products by rule** to "Yes."

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



Category Condition

a. Choose the **Attribute** that is the basis of the condition.

b. Set **Operator** to one of the following:

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

c. Enter the appropriate **Value**.

3. To add another condition, tap **Add Condition** and repreat 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.

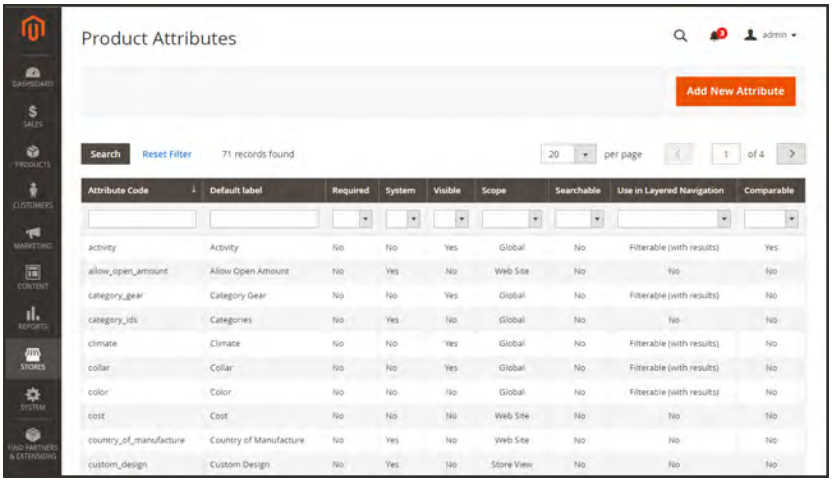
Notes

CHAPTER 15:

Using Product Attributes

Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Attributes are used as input controls for product options, to provide additional information on product pages, as search parameters, and as criteria for layered navigation, product comparison reports, and price rules.

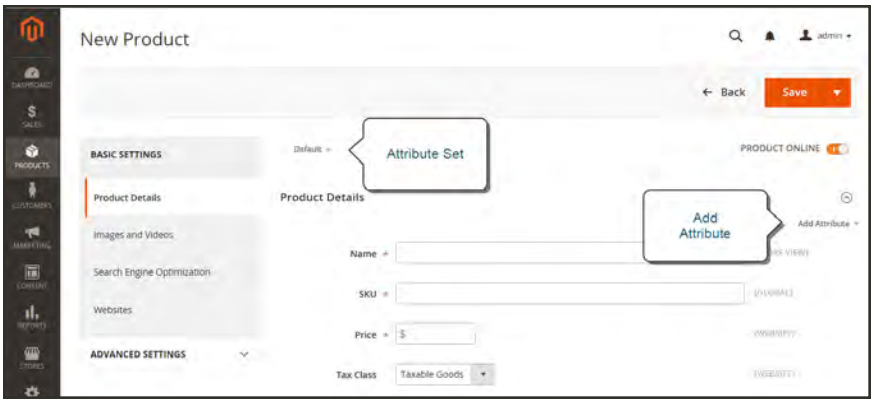
Attributes, such as price, that are built into the core Magento platform are called “system attributes.” In addition, you can create as many attributes as you need to describe the products in your catalog.



Product Attributes Page

Adding an Attribute

Although attributes are managed from the Stores menu, you can 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 used by the product.



Process Overview:

Step 1: Add a New Attribute

Step 2: Describe the Basic Properties

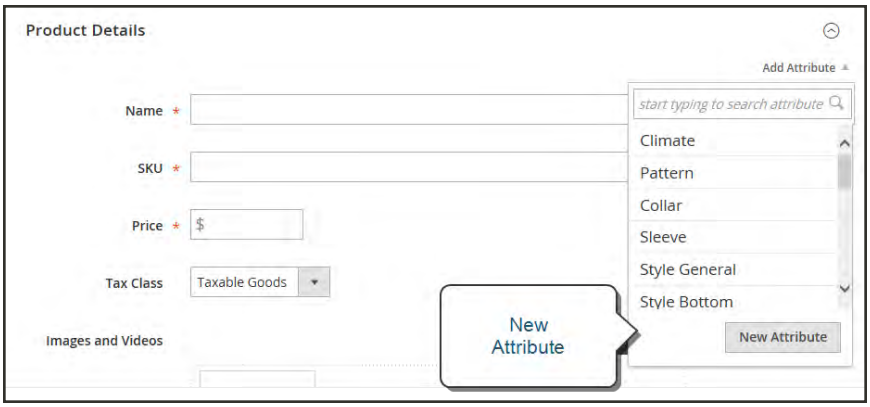
Step 3: Describe the Advanced Properties

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. Under **Product Details** , tap **Add Attribute**.



New Attribute

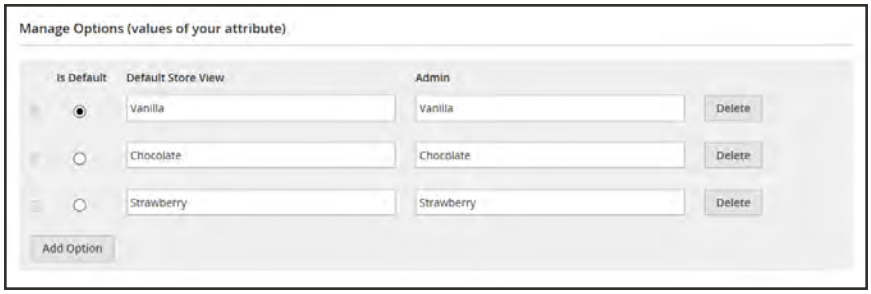
2. To add an existing attribute to the product, do one of the following:
   - Type the name of an existing attribute into the search box.
   - Click the search box, and choose an existing attribute from the list.
3. To define a new attribute, tap **New Attribute**. Then, do the following:

Step 2: Describe the Basic Properties

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Tap **Add New Attribute**.

Attribute Properties

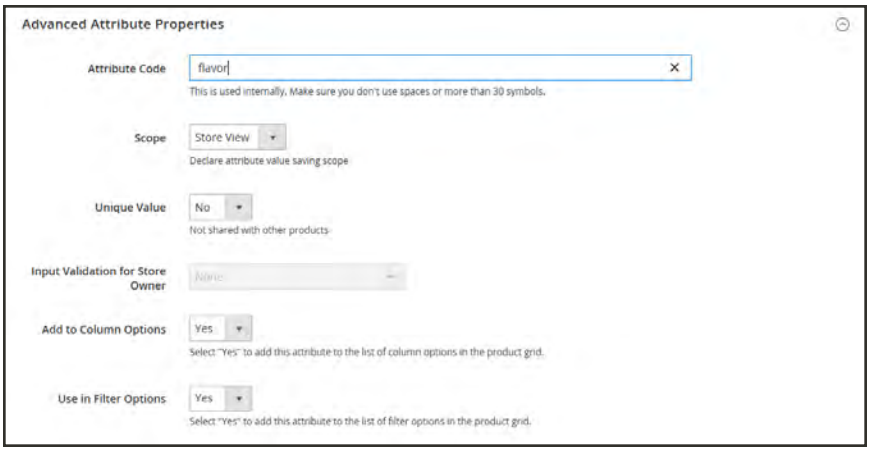
3. Under **Attribute Properties**, enter a **Default Label** to identify the attribute.
4. Set **Catalog Input Type for Store Owner** to the input control used to enter data into the field.
5. For Dropdown and Multiple Select input types, do the following:
   a. Under **Manage Options**, tap **Add Option**.
   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

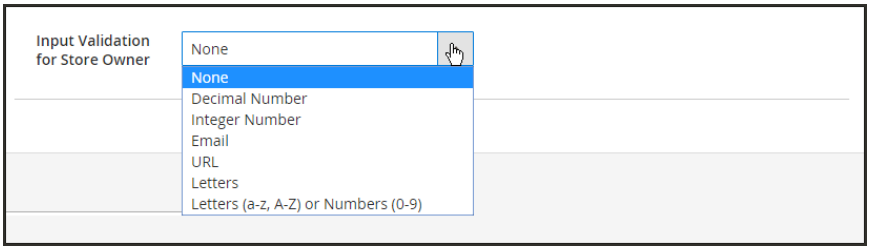
Step 3: Describe the Advanced Properties (if needed)

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



Advanced Attribute Properties

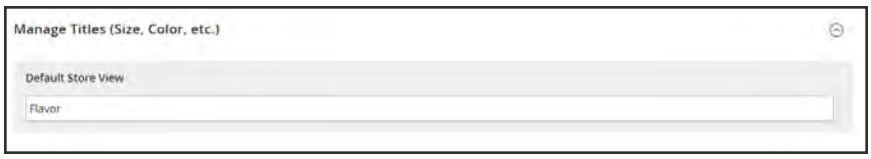
2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.
3. If you want to prevent duplicate values from being entered, set **Unique Value** to "Yes."
4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. The test can validate any of the following:
   - Decimal Number
   - Integer Number
   - Email
   - URL
   - Letters
   - Letters (a-z, A-Z) or Numbers (0-9)



Input Validation

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.



Manage Titles

Step 5: 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."

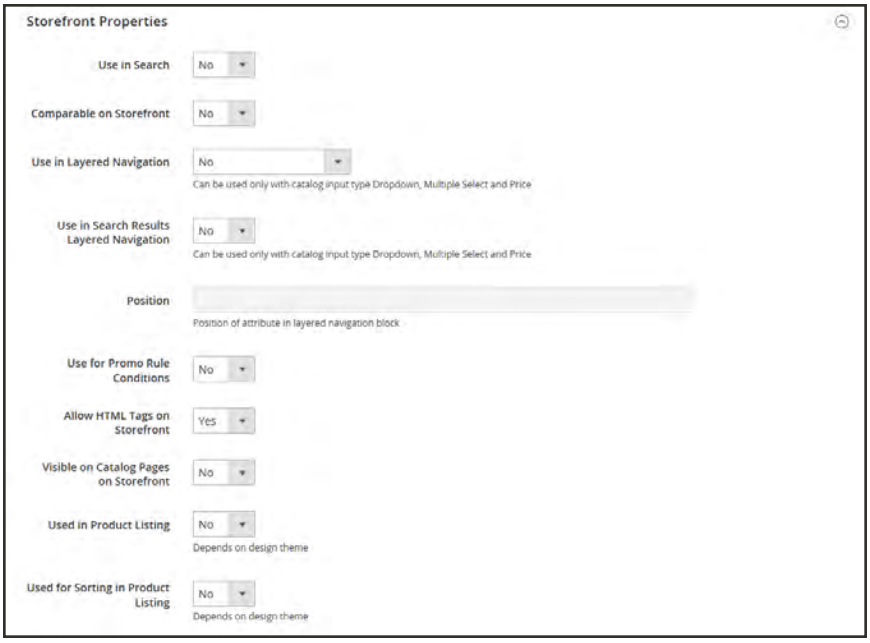
7. Complete the following settings if supported by your theme:

   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."

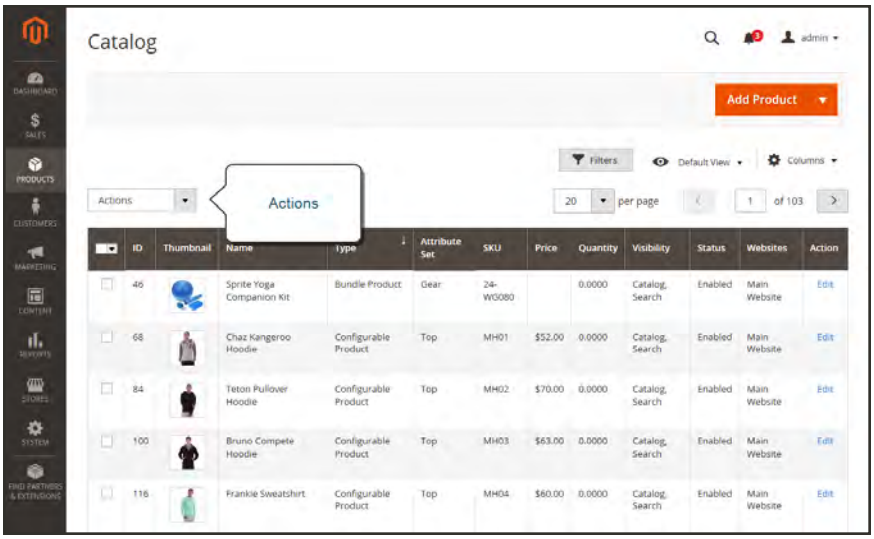
8. When complete, tap **Save Attribute**.



Storefront Properties

Updating Product Attributes

The Actions control in the Catalog grid can be used to update the attributes of multiple products at the same time.

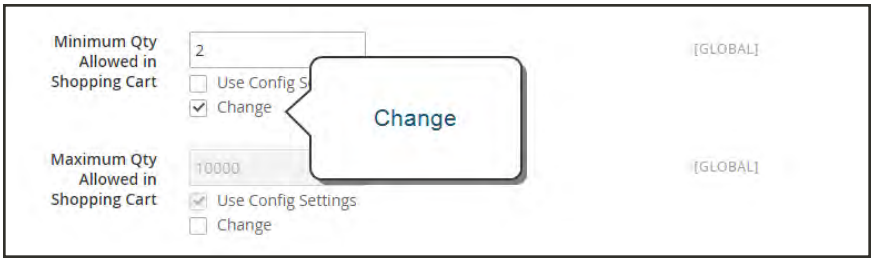


Catalog Grid

To update attributes

1. In the grid, mark the checkbox of each product to be updated.
2. Set the **Actions** control to "Update Attributes." Then, 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.



Update Attributes

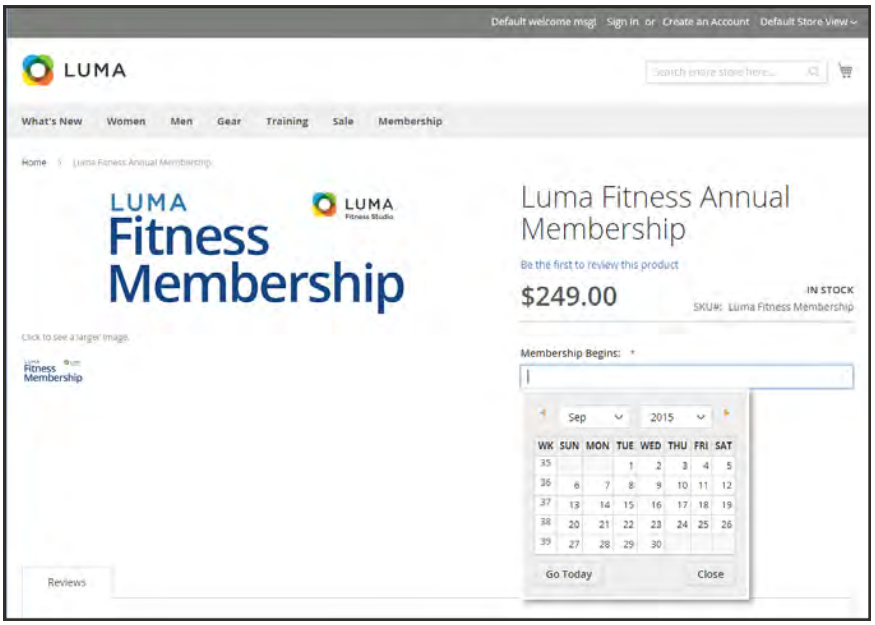
Attribute Input Types

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.

PROPERTY	DESCRIPTION
Text Field	A single line input field for text.
Text Area	A multiple-line input field for entering paragraphs of text such as a product description. Use the Editor to format the text with HTML tags, or type the tags directly into the text.
Date	Date values can be entered by making a selection from a drop-down list, or popup calendar . Depending on the configuration, dates can be typed directly into a field, or selected from the calendar or list. To format date and time values, see: Date & Time Custom Options.
Yes/No	Displays a drop-down list with pre-defined options of “Yes” and “No.”
Dropdown	Displays a drop-down list of values. Only one item can be selected at a time. The Dropdown input type is a key component of configurable products.
Multiple Select	Displays a drop-down list of values. To select more than one option, hold the Ctrl key down and click each item.
Price	Creates price fields in addition to the predefined attributes of Price, Special Price, Tier Price and Cost. The currency is determined by the system configuration.
Media Image	Associates an additional image with a product, such as a product logo, care instructions, or ingredients from a food label. When you add a media image attribute to the attribute set of a product, it becomes an additional image type, along with Base, Small, and Thumbnail. The media image attribute can be excluded from the thumbnail gallery, but can still be used.
Fixed Product Tax	Defines FPT rates based on the requirements of your locale. To learn more, see: General Tax Settings.

Date & Time Custom Options

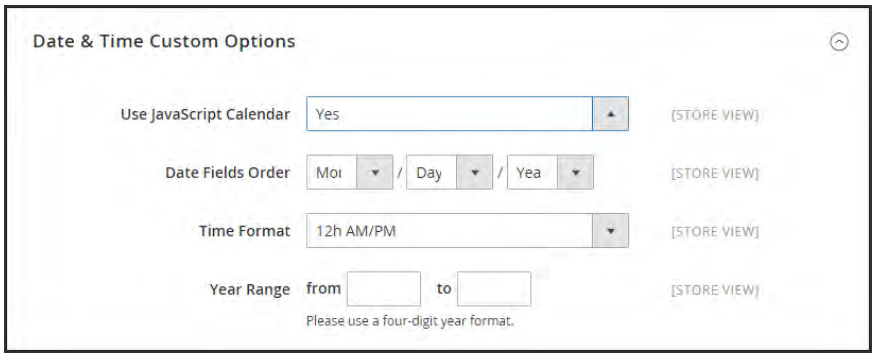
You can customize the format of date and time fields, and select the input control that is used for data entry. Dates values can be selected from a drop-down list, or pop-up calendar.



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, and do the following:
   a. To use a popup calendar as the input control for date fields, set **Use JavaScript Calendar** to "Yes."
   b. To establish the **Date Fields Order**, set each to one of the following:
      - Month
      - Day
      - Year
   c. Set your preferred **Time Format** to one of the following:
      - 12h AM/PM
      - 24h
   d. To establish the **Year Range** for the drop-down year values, enter the year in YYYY format to set the **from** and **to** dates. If blank, the field defaults to the current year.



Date & Time Custom Options

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

Notes

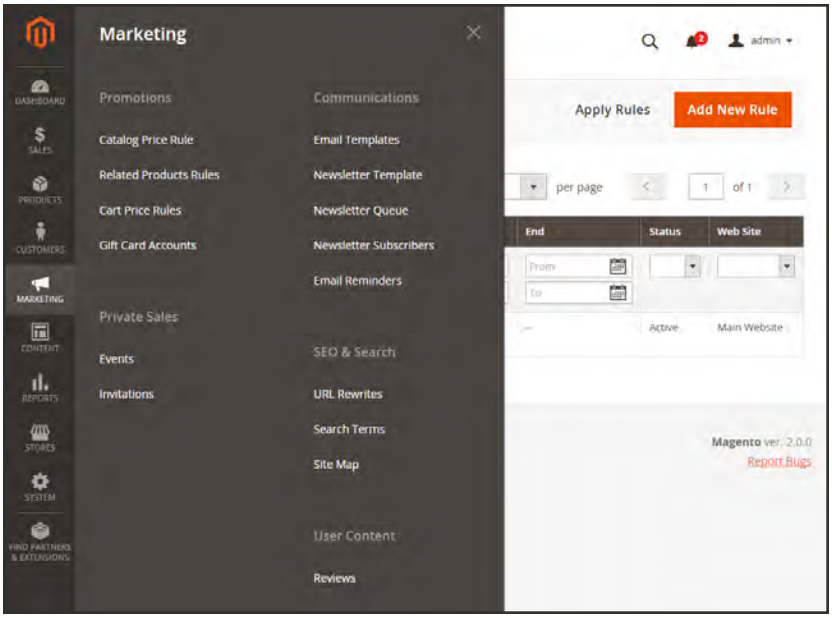
MARKETING

Contents

CHAPTER 16:

Marketing Menu

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



Marketing Menu

Menu Options

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.

- Catalog Price Rules
- Related Products Rules
- Cart Price Rules
- Gift Card Accounts

Private Sales

Private sales and other events are a great way to leverage your existing customer base to generate buzz and new leads, or to offload surplus inventory.

- Events
- Invitations

Communications

Customize all notifications sent from your store. Create newsletters and publish RSS feeds.

- Email Templates
- Newsletter Template
- Newsletter Queue
- Newsletter Subscribers
- Email Reminders

SEO & Search

Analyze search terms to help customers find products in the store, manage meta data, and create a site map. Use redirects to manage URL changes and avoid broken links.

- URL Rewrites
- Search Terms
- Site Map

User Content

Leverage user-generated product reviews to create a sense of community, and increase sales.

- Reviews

Notes

CHAPTER 17:

Shopping Tools

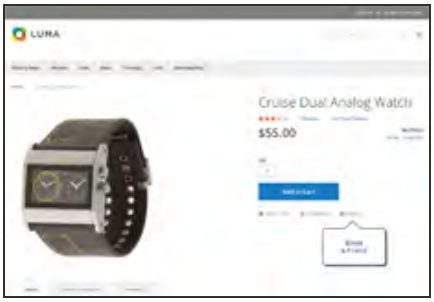
Your store includes a set of shopping tools that create opportunities for customers to interact with your store, and to share the experience with friends. Topics include:

- Opportunities to Engage
- Product Relationships
- Compare Products
- Recently Viewed/Compared
- Gift-Related Options

Magento eBook

Learn five simple and inexpensive strategies to increase your average order value (AOV), and optimize and personalize the shopping experience.Get the eBook now!

Opportunities to Engage



Email a Friend

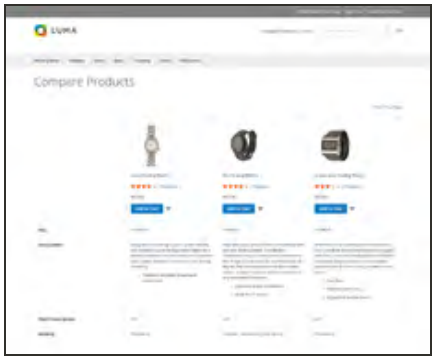
The Email a Friend link makes it easy for your customers to share links to products with their friends.

Wish Lists

Customers can create multiple wish lists, and share them with family and friends..

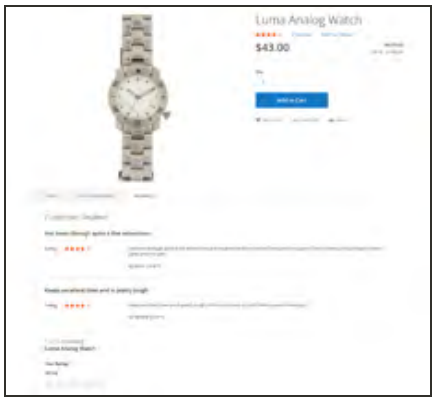
Gift-Related Options

Magento offers a variety of gift-related products and services, including gift cards, gift wrapping, and the ability for customers to include a gift message or printed card.



Compare Products

A detailed product comparison report gives customers the information they need to make an informed purchase. .



Product Reviews

Product reviews help build a sense of community, and are considered to be more credible than advertising.

Product Relationships

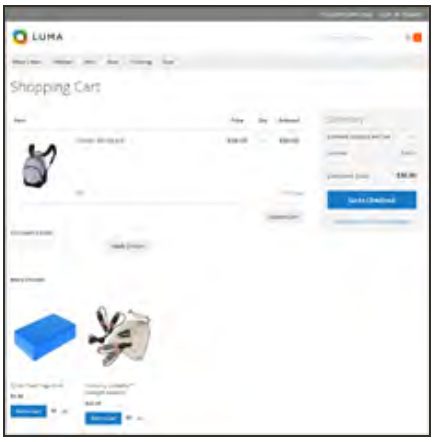
Products in your catalog can be promoted on other pages by defining the nature of the relationship between the products. The options available are: Up-sell products, Related products, and Cross-sell products.

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

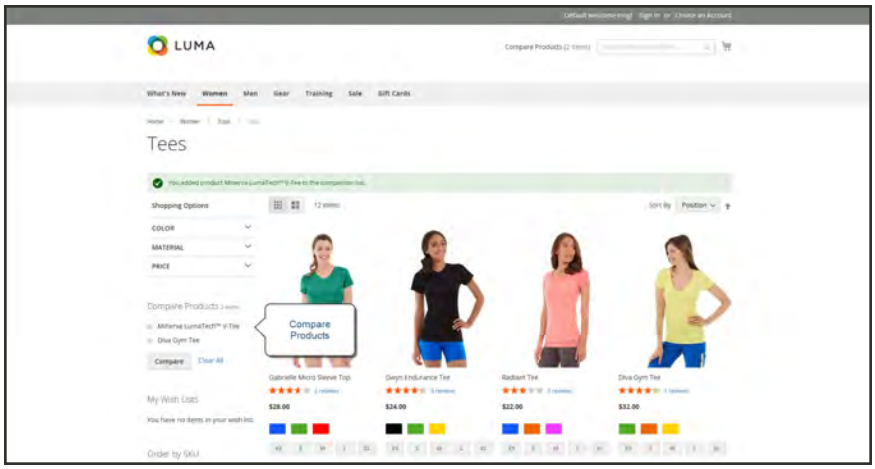
Cross-sell products are offered on the shopping cart page as last-minute purchases before the checkout process begins.

Related Product Rules

Create a targeted selection of related products, up-sells, and cross-sells.

Compare Products

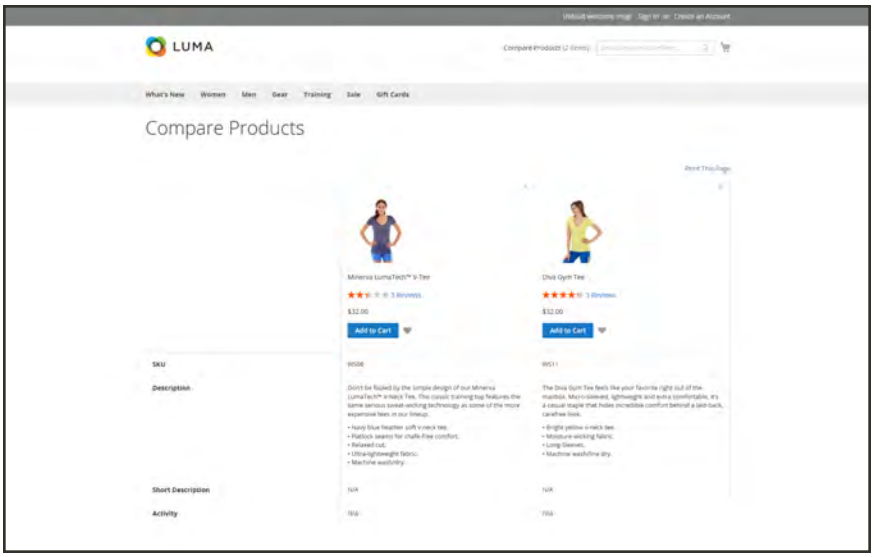
The Compare Products block usually appears in the far right column, or sidebar of the category page, and can be used to generate a detailed, side-by-side comparison of two or more products. You can customize the report to include additional attributes or remove ones that you don't want to include. Depending on the theme, the Add to Compare link can be represented by an icon or a link.



Compare Products

To compare products:

1. From your storefront, find the products that you want to compare, and click the **Add to Compare** link for each.
2. In the Compare Products block in the right sidebar, click the **Compare** button. The Compare Products report opens in a new window.
3. To print the report, click **Print This Page**.
4. To clear the Compare Products list, click the **Clear All** link.



Compare Products Report

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**.

   In the panel on the left under **Catalog**, choose **Catalog**.

2. 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.

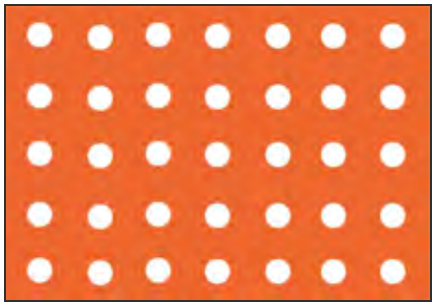
   b. In the **Default Recently Viewed Products Count** field, enter the number of recently viewed products to appear in the list.

   c. In the **Default Recently Compared Products Count**, enter the number of recently compared products to appear in the list.

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

Gift-Related Options

Magento offers a variety of gift-related products and services. Some can be applied to an individual item or to the entire order. An additional charge can be added to include a printed card or gift wrapping.



Gift Wrapping

Gift wrapping can be applied to an entire order, or for specific items in the order during checkout. The price for gift wrapping an individual item is set in the product record.

Gift Messages and Cards

A gift message or printed card can be added to the entire order or to specific items in the order during checkout.

Gift Receipts

During checkout, a gift receipt can be included in the order by marking the Include Gift Receipt checkbox.

Gift Cards

A gift card is a product that you can offer for sale from your catalog. The gift card can be physical, virtual, or a combination of the two. Each gift card has a value assigned, with a unique code that is entered during checkout. Each gift card has an associated account to keep track of the balance.

Gift Registries

Your customers can create gift registries for special occasions, and invite friends and family to participate. When items are purchased from the gift registry, the inventory is updated.

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. Here are a few ways you can use price rules to offer incentives to your customers:

- 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

Price rules let you set up promotions in advance, so they spring into action whenever the required conditions are met.

Contents

CHAPTER 18:

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

Creating a Price Rule

Process Overview:

Step 1: Add a New Rule

Step 2: Define the Conditions

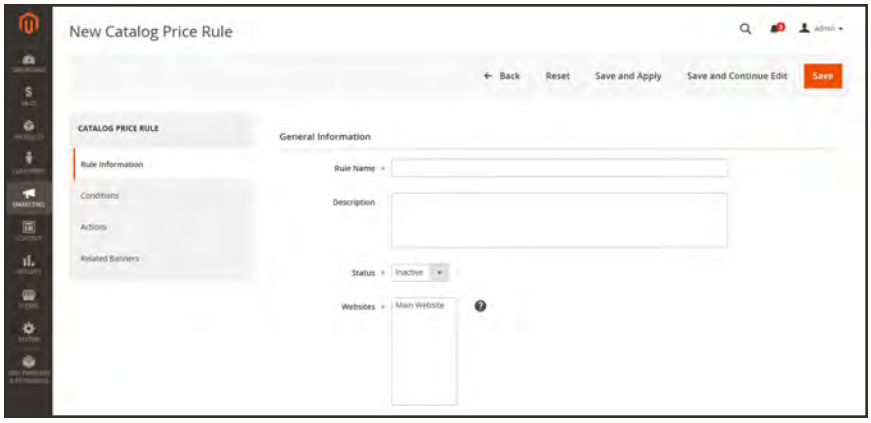
Step 3: Define the Actions

Step 4: Apply the Rule

Step 1: Add a New Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Catalog Price Rule**.
2. In the upper-right corner, tap **Add New Rule**.

   The options in the panel on the left include Rule Information, Conditions, Actions, and Related Banners.



Rule Information

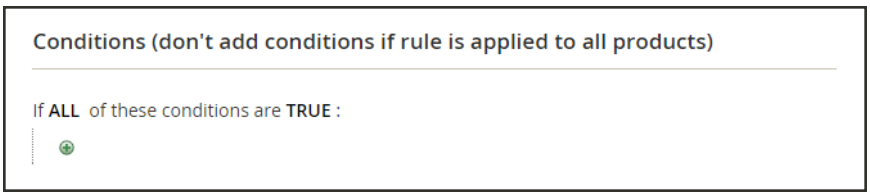
3. On the Rule Information page, do the following:
   a. Complete the **Rule Name** and **Description** fields. These fields are for your internal reference only.
   b. Set **Status** to "Active."
   c. Select the **Websites** where the rule is to be available.
4. To establish the scope of the rule, do the following:
   a. Select the **Websites** where the promotion is to be available.
   b. Select the **Customer Groups** to which this rule applies.

5. Set **From** and **To** dates to define the range of dates when the rule will be in effect. You can either enter the dates, or select the dates from the Calendar .
   - If you leave the dates blank, the rule is enabled as soon as the price rule is saved.
6. 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. In the panel on the left, choose **Conditions**. The first rule begins:



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.

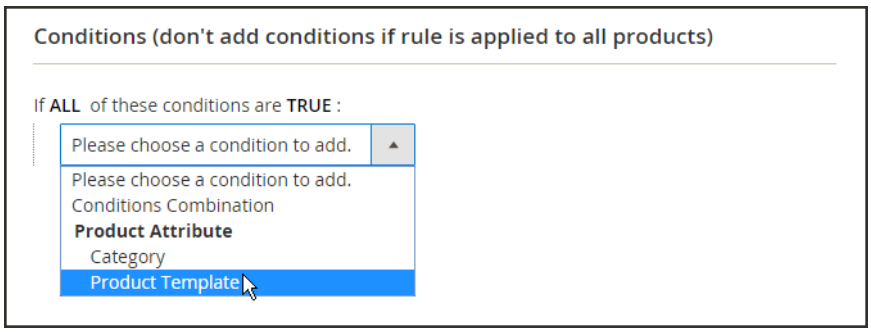
- Tap the **ALL** link, and select “ALL” or “ANY.”
- Tap the **TRUE** link, and select “TRUE” or “FALSE.”
- Leave the condition unchanged to apply the rule to all products.

You can create different conditions by changing the combination of these values.

```
If ALL of these conditions are TRUE:
```

2. Tap the **Add** button at the beginning of the next line.

a. In the list under **Product Attribute**, choose the attribute that you want to use as the basis of the condition. For this example, the condition is "Product Template."



Condition Line 2, Part 1

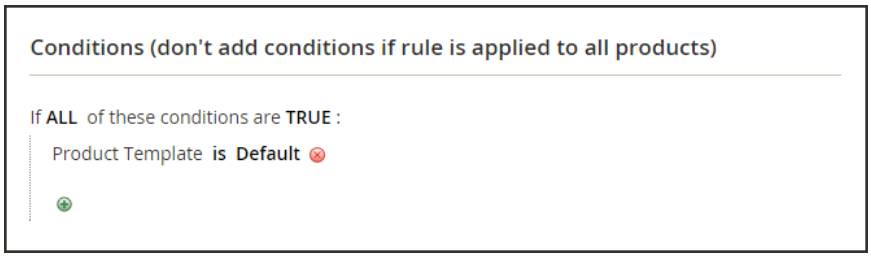
> For an attribute to appear in the list, it must be configured to be used in promo rule conditions. To learn more, see: Attribute Frontend Properties.

The selected condition appears in the statement, followed by two more bold links. The statement now says:

```
If ALL of these conditions are TRUE:

Product Template  is …
```

b. Tap the **is** link, and select the comparison operator that describes the condition to be met. In this example, the options are "IS" or "IS NOT."

c. Then, tap the ... "more" link, and choose the product template 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:

Product Template  is Default
```

3. To add another line to the statement, tap the **Add** button, and choose one of the following:

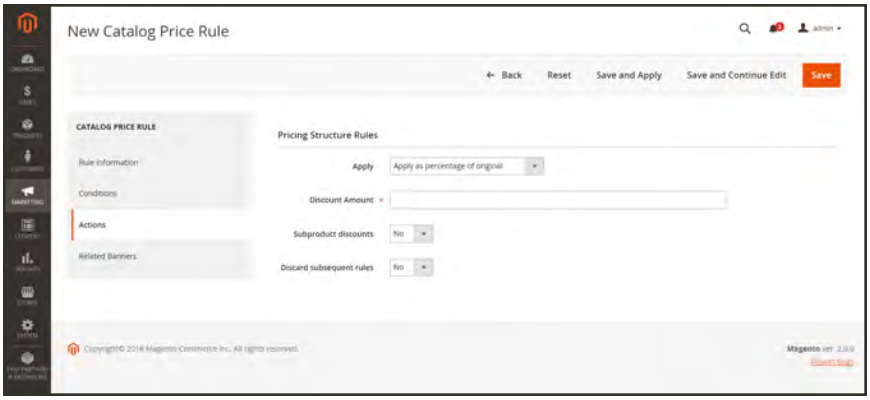
- Conditions Combination
- Product Attribute

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. In the panel on the left, select **Actions**.



Actions

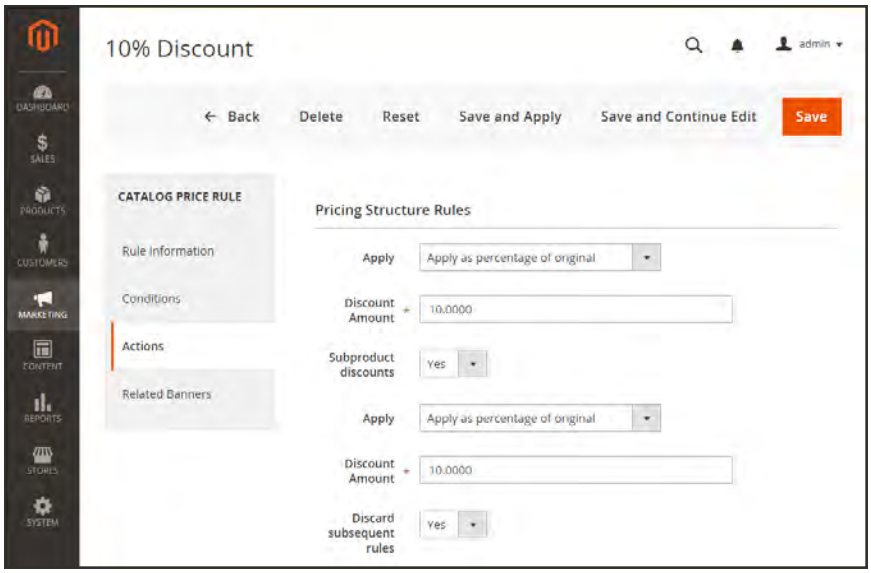
2. Under Pricing Structure Rules, set **Apply** to one of the following:

Apply as percentage of original	Discounts item by subtracting a percentage from the original price. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Apply as fixed amount	Discounts item by subtracting a fixed amount from original price. For example: Enter 10 in Discount Amount for an updated price that is $10 less than the original price.
Adjust final price to this percentage	Discounts item by defining the final price based on percentage. For example: Enter 10 in Discount Amount for an updated price that is 10% of the original price.
Adjust final price to discount value	Sets the price to a fixed amount.

3. Do one of the following:

- Enter the **Discount Amount**.
- To apply the discount amount to associated products, set **Subproduct Discounts** to "Yes." Select the pricing structure, and 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.
5. Tap **Save and Continue Edit**.



Pricing Structure Rules

Step 4: Apply the Rule

As new rules are added, the prices and the priorities are recalculated accordingly.

1. To apply a new rule immediately, do one of the following:
   - Tap **Save and Apply**.
   - From the Catalog Price Rules list, tap **Apply Rules**.
2. Test the rule to make sure that it works correctly.

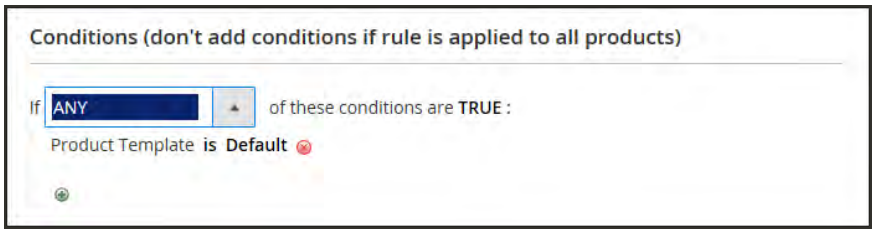
   When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.As new rules are added, Magento recalculates the prices and the priorities accordingly.

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. In the following illustration, multiple products are selected for a catalog price rule.

To apply a price rule to multiple SKUs:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Catalog Price Rules**.
2. Do one of the following:
   - Follow the instructions to create a catalog price rule.
   - Open an existing catalog price rule.
3. In the panel on the left, choose**Conditions**. Then, do the following:
   a. In the first line, set the first parameter to "ANY."



If ANY of these conditions are TRUE

   b. If the price rule doesn't have a line for SKU, Tap **Add** at the beginning of the next line. Then, in the list under Product Attribute, select **SKU**.
   c. Click the **...** "more" link to display more options. Then, tap the **Chooser** button to display the list of available products.
   d. In the list, select the checkbox of each product that you want to include. Then, tap **Select** to add the SKUs to the condition.
4. Complete the rule, including any Actions to be taken when the conditions are met.
5. To apply the rule, tap **Save Rule** .

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

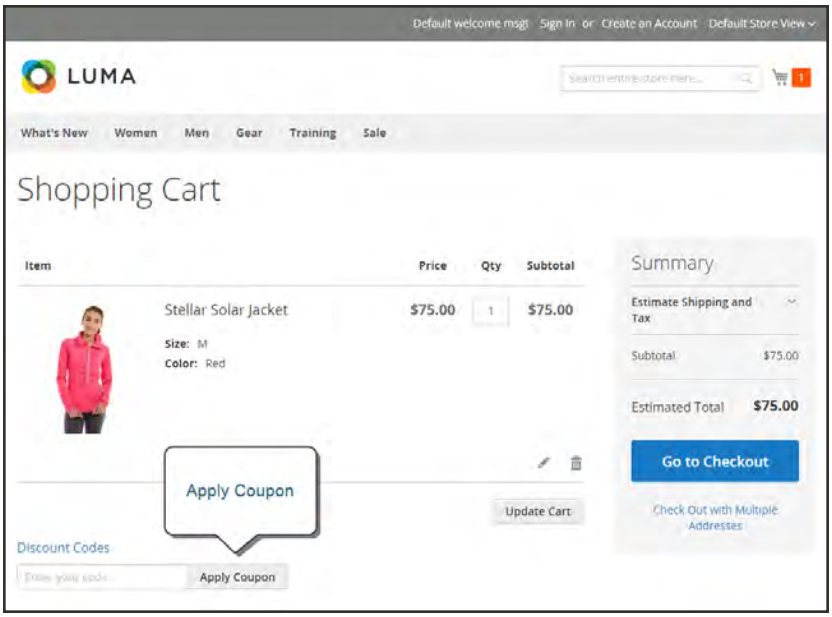
Notes

CHAPTER 19:

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 price rule can be used as needed for a season or promotion by changing its status and date range.

Important! Cart price rules using the Payment Method condition are currently not working correctly in the Magento storefront. Price rules that are activated either by a specific coupon or automatically will not be applied. They do, however, work correctly for orders created in the Admin. Rules with payment method conditions that were created with pre-release versions of Magento 2 or with Magento 1.x, load correctly in the Admin. The recommended workaround is to create the order manually in the Admin.



Apply Coupon in Cart

Creating a Cart Rule

Process Overview:

Step 1: Add a New Rule

Step 2: Define the Conditions

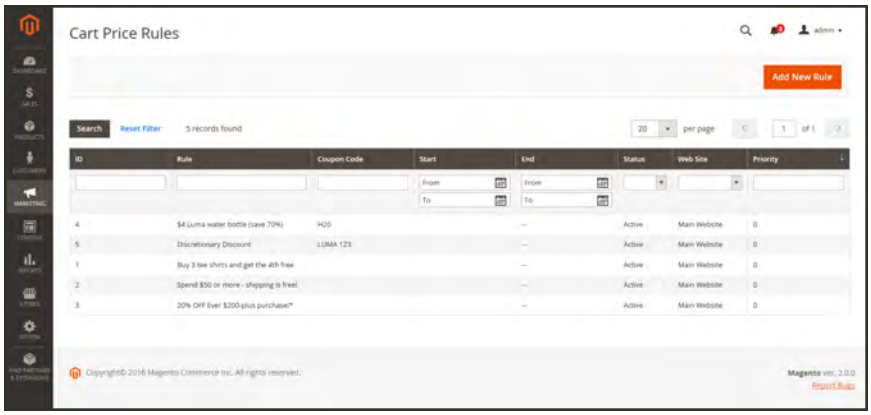
Step 3: Define the Actions

Step 4: Complete the Labels

Step 6: Apply the Rule

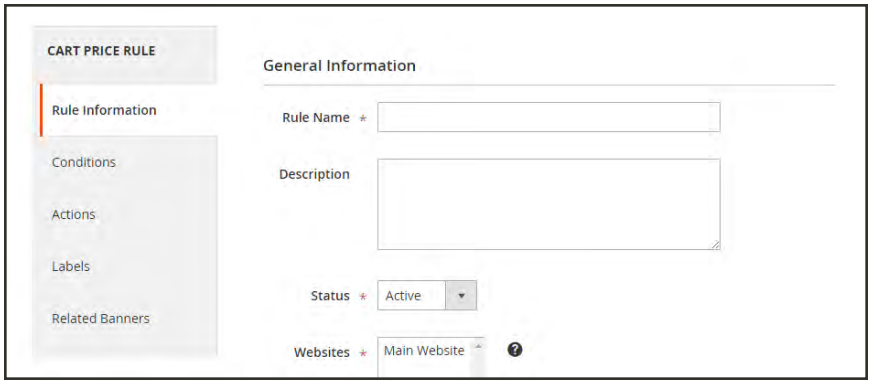
Step 1: Add a New Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.



Cart Price Rules

The options in the panel on the left include Rule Information, Conditions, Actions, Labels, and Related Banners.

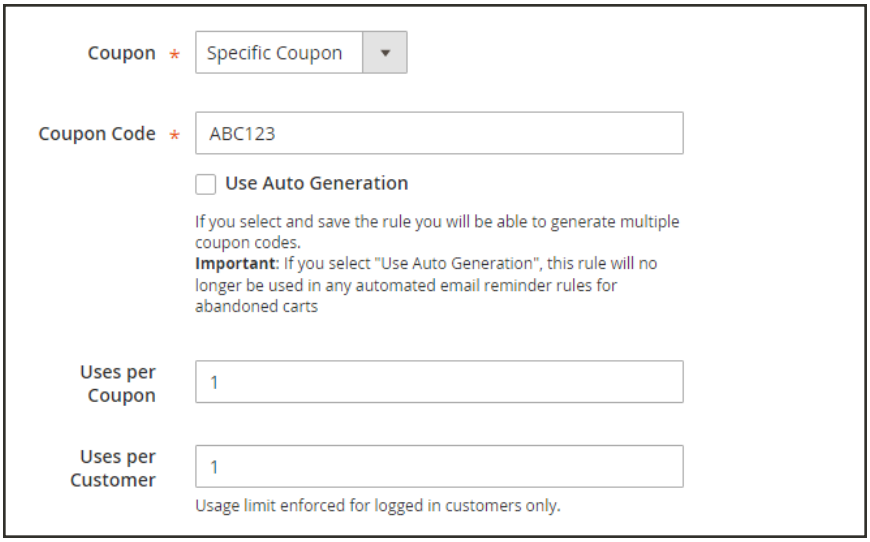


General Information

2. Under General Information, complete the **Rule Name** and **Description**.

3. For the rule to go into effect immediately, set **Status** to "Active."
4. 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.
      - For the promotion to be available only to registered customers, do not select the "NOT LOGGED IN" option.
5. To associate a coupon with the price rule, set **Coupon** to "Specific Coupon." Then, do the following:
   a. Enter a numeric **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:

Uses per Coupon	Determines how many times the coupon code can be used. If there is no limit, leave the field blank.
Uses per Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any of the selected customer groups. The setting does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. If there is no limit, leave the field blank.



Coupon Settings

6. To define the "good through" date range for the promotion, do the following:

a. Click the **Calendar** next to the **From** field, and choose the first date the coupon can be used. The promotion will start at the beginning of that day.

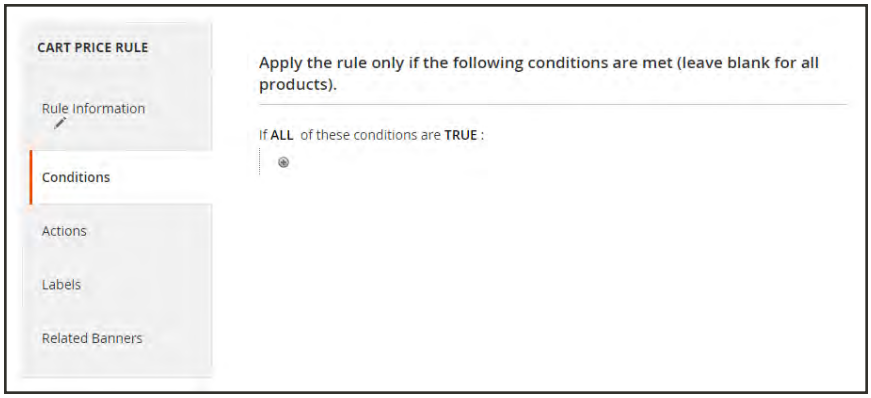
b. Click the **Calendar** next to the **To** field, and choose the last date the coupon can be used. The promotion will stop at the end of that day.

7. Enter a number to determine the **Priority** of this price rule in relation to the Action settings of other price rules that might be active at the same time. (Number 1 has the highest priority.)

8. To apply the rule to published listings in RSS feeds, set **Public In RSS Feed** to "Yes."

Step 2: Define the Conditions

In this step, the conditions are described that must be met for an order to qualify for the promotion. The rule goes into action whenever the set of conditions is met.



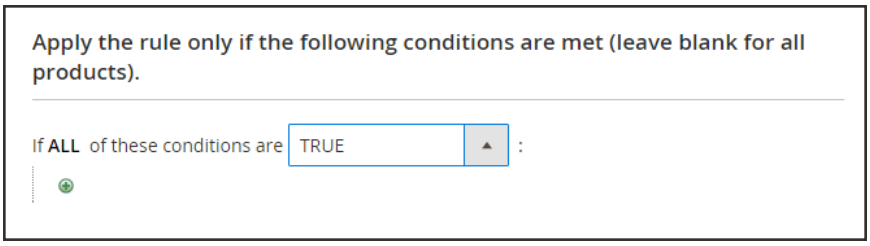
Conditions

1. In the panel on the left, select **Conditions**. The first rule appears by default, and states:

```
If ALL of these conditions are TRUE:
```

The statement has two bold links which when tapped, display the selection of options for that part of the statement. You can create different conditions by changing the combination of these values. Do any of the following:

- Click the **ALL** link, and select "ALL" or "ANY."
- Click the **TRUE** link and select "TRUE" or "FALSE."
- Leave the condition unchanged to apply the rule to all products.

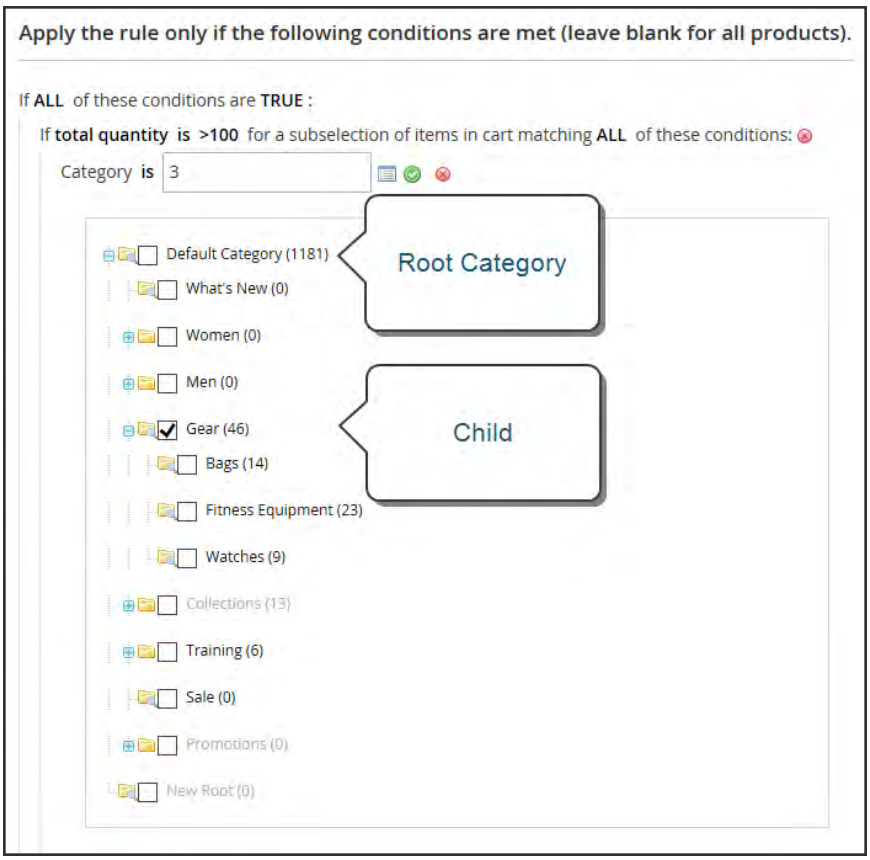


Condition - Line 1

2. Click **Add** at the beginning of the next line. Then, choose one of the following options from the list to describe the condition that you want to set for the rule.

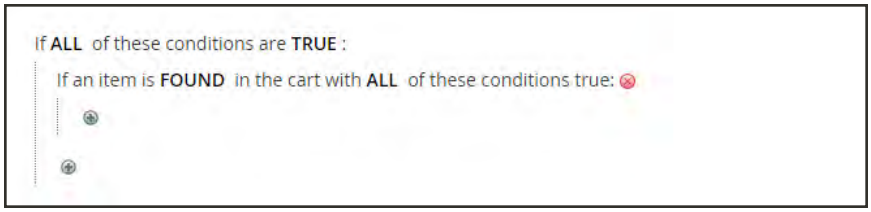
   - Product attribute combination
   - Products subselection
   - Conditions combination
   - Cart Attribute

   A condition can be based on any category that is a child of the store's root category. When you choose Products subselection > Product attribute > Category, the category tree shows the available categories under the store root.



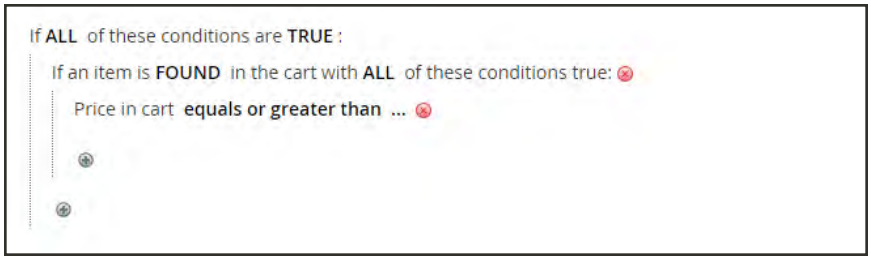
Choosing a Category for a Condition

For the condition in this example,, we choose **Product Attribute Combination**. , which says, "If an item is FOUND in the cart with ALL of the conditions TRUE. You could also change the condition to "If an item is NOT FOUND in the cart with ANY of these conditions true:



Condition - Line 2, Part 1

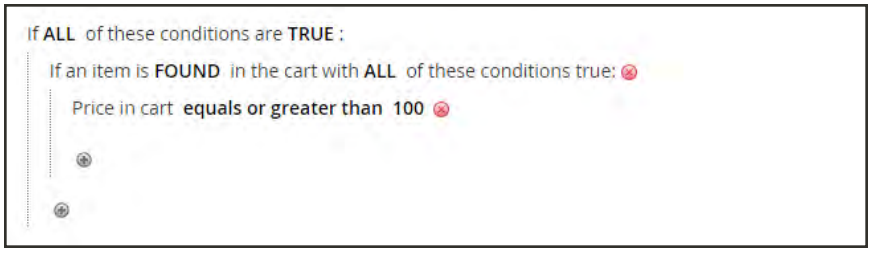
When you make a selection, the basic structure of the statement appears in the box with additional links to mark where you can select information. Each bold word is a building block that describes a different aspect of the condition. For this example, the selected condition is that the price in the cart "equals or greater than 100."



Condition - Line 2, Part 1

> For an attribute to appear in the list, its Use for Promo Rules Conditions property must be set to "Yes."

3. Click the ellipsis ... link, which means "more," and enter the amount that triggers the discount. The amount appears in the statement to complete the condition.



Completed Condition

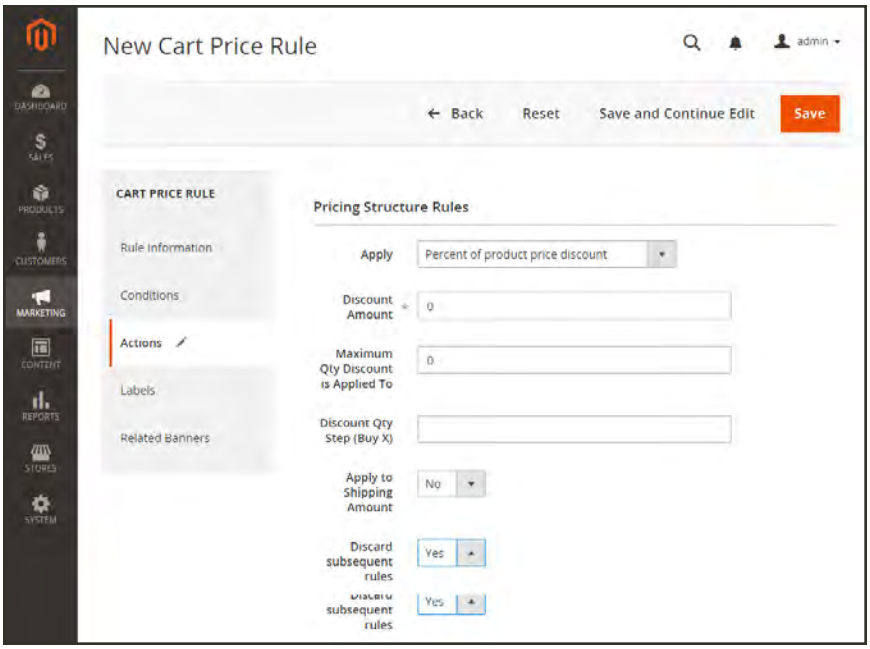
4. To add more conditions, click **Add** and define another condition.

   You can repeat the process as many times as needed to describe the condition.

   If at any time you want to delete part of the statement, click **Delete** at the end of the line.

Step 3: Define the Actions

The shopping cart price rule actions describe how prices are updated when the conditions of the rule are met.



Cart Price Rule Actions

1. In the panel on the left, select **Actions**.
2. Set **Apply** to one of the following discount options:

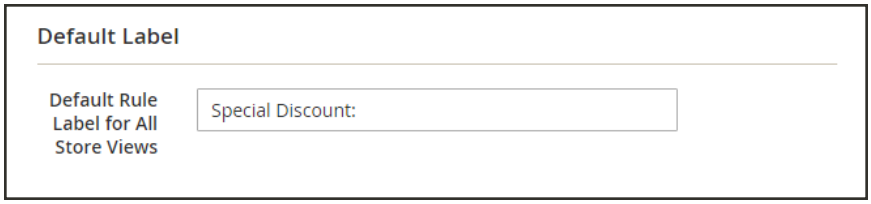
Percent of product price discount	Discounts item by subtracting a percentage from the original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is $10 less than the original price.
Fixed amount discount for whole cart	Discounts the entire cart by subtracting a percentage from the cart total. For example: Enter 10 in Discount Amount to subtract 10% from the cart total.
Buy X get Y free	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)

3. 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.
4. In the **Maximum Qty Discount is Applied To** field, enter the maximum number of the same product that can qualify for the discount in the same purchase.
5. To apply the discount to the shipping amount, set **Apply to Shipping Amount** to "Yes."
6. 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.
7. To give the customer reward points for triggering the price rule, enter the number of points the price rule is worth.
8. If you want to extend free shipping for orders that meet conditions, set **Free Shipping t**o one of the following:
   - For matching items only
   - For shipment with matching items
9. You can continue to define as many levels as needed to describe the conditions to be met.
10. When complete, tap **Save Rule**.

Step 4: Complete the Labels

The label appears on the order below the subtotal to identify the discount. You can enter a default label for all store views, or enter a different label for each view.

1. In the panel on the left, select **Labels.**
2. In the Default Label section, enter the text for the **Default Rule Label for All Store Views**.



Default Label

3. In the Store View Specific Labels section, enter the label text for each store view. For example, if each store view is in a different language, enter the label translation for each view.

Step 5: Apply the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

   When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.As new rules are added, Magento recalculates the prices and the priorities accordingly.

Field Descriptions

FIELD	DESCRIPTION
RULE INFORMATION	
Rule Name	(Required) The name of the rule is for internal reference.
Description	A description of the rule should include the purpose of the rule, and explain how it is used.
Status	(Required) Determines if the rule is currently active in the store. Options: Active / Inactive
Websites	(Required) Identifies the websites where the rule can be used.
Customer Groups	(Required) Identifies the customer groups to which the rule applies.
Coupon	(Required) Indicates if a coupon is associated with the rule. Options: No Coupon — No coupon is associated with the rule. Specific Coupon — A specific coupon is associated with the rule. Coupon Code — When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion. Use Auto Generation — Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion. Auto — Displays the Coupons Information section to define the format of the coupon codes to be generated.
Uses per Coupon	The number of times the coupon code can be used.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Uses per Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any selected customer group. Does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. For no limit, leave blank.
From	The first date the coupon can be used.
To	The last date the coupon can be used.
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.
Public in RSS Feed	Determines if the promotion is included in your store's public RSS feed. Options: Yes / No.
ACTIONS	
Apply	Determines the type of calculation that is applied to the purchase. Options: Percent of product price discount — 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. Fixed amount discount — Discounts item by subtracting a fixed amount from original price. For example: Enter 10 in Discount Amount for an updated price that is $10 less than the original price.

Field Descriptions (cont.)

FIELD	DESCRIPTION	
	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.
	Buy X Get Y Free (discount amount is Y)	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)
Discount Amount	(Required) The amount of discount that is offered.	
Maximum Qty Discount is Applied To	Sets the maximum number of products that the discount can be applied to in the same purchase.	
Discount Qty Step (Buy X)	Sets the number of products represented by “X” in a “Buy X Get Y Free” promotion.	
Apply to Shipping Amount	Determines if the discount can be applied to the cost of shipping. Options: Yes / No.	
Discard Subsequent Rules	Determines if additional rules can be applied to this purchase. To prevent multiple discounts from being applied to the same purchase, select “Yes.” Options: Yes / No	
Add Reward Points	Determines the number of reward points the customer earns when the rule is applied.	
Free Shipping	Determines if free shipping is included in the promotion, and if so, for which items. Options:	
	No	Free shipping is not available when a coupon that is based on the rule is used.
	For matching items only	Free shipping is available only for specific items in the cart that match the rule.
	For shipment with matching items	Free shipping is available for the entire cart when a coupon that is based on the rule is used.

LABELS

Field Descriptions (cont.)

FIELD	DESCRIPTION
Default Rule Label for All Store Views	A default label that identifies the discount and can be used for all store views.
Store View Specific Labels	If applicable, a different label that identifies the discount for each store view.
RELATED BANNERS	
	Lista all banners that are available to be used with the rule. To learn more, see: Using Banners in Price Rules.

Coupon Codes

Coupons codes are used with shopping 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 shopping 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:

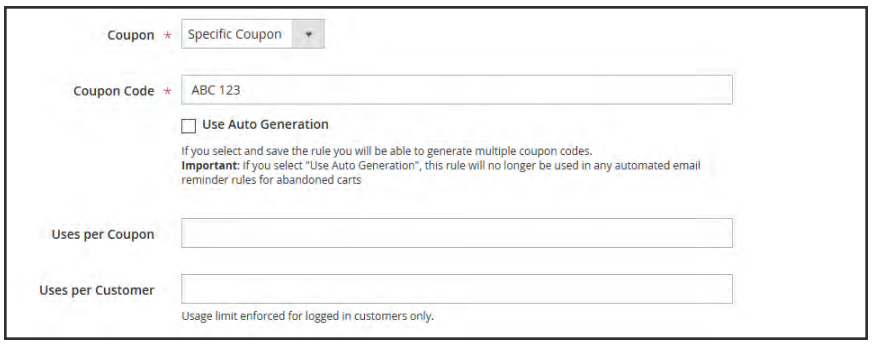
- Email coupons to customers
- Produce printed coupons
- Create in-store coupons for mobile users

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 numeric **Coupon Code** to be used with the promotion.
   b. To limit the number of times the coupon can be used, complete the following:
      - Uses per Coupon
      - Uses per Customer

      For unlimited use, leave these fields blank.



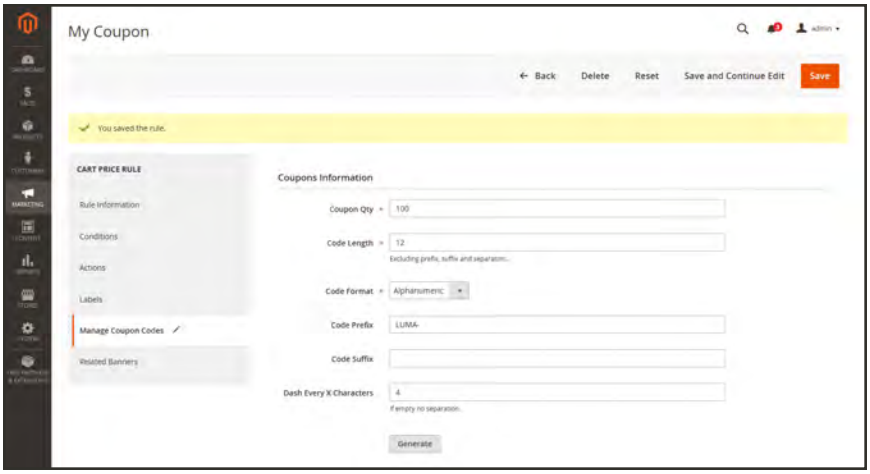
Coupon Information

c. To make the coupon valid for a limited period of time, complete the **From** and **To** dates. To select the date, tap the **Calendar** button next to each field. If you leave the date range empty, the rule will never expire.

3. Complete the cart price rule.

Method 2: Generate a Batch of Coupons

1. Follow the instructions to create a shopping cart price rule.
2. On the General Information page, do one of the following:
   - For a specific coupon, select the **Use Auto Generation** checkbox.
   - Set **Coupon** to "Auto."
3. Tap **Save and Continue Edit**.
4. In the panel on the left, select **Manage Coupon Codes**. Then under **Coupons Information**, do the following:



Coupon Information

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.

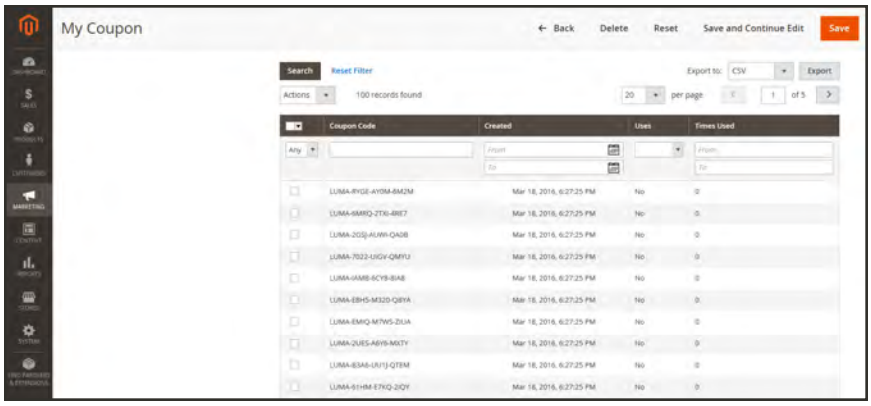
c. Set the **Code Format** to one of the following:
   - Alphanumeric
   - Alphabetical
   - Numeric

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.

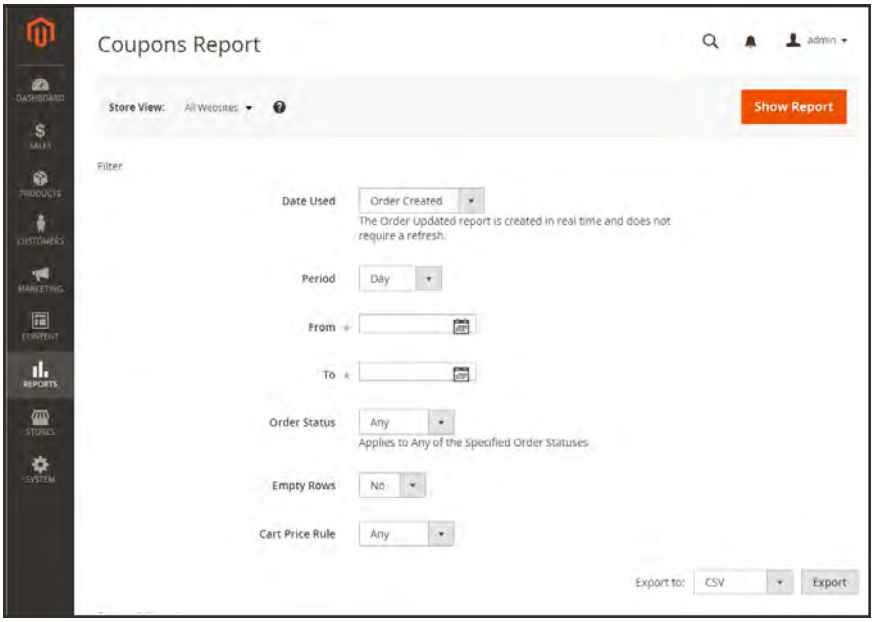
5. After completing the code format, click **Generate**. The list of generated codes appears below.



Generated Coupon Codes

Coupons Report

The Coupons Report can be filtered for a specific store view, time period, order status, and price rule,



Coupon Report Filters

To run the report:

1. On the Admin sidebar, tap **Reports**. Then under **Sales** choose **Coupons**.
2. If you have multiple store views, set **Store View** in the upper-left corner to establish the scope of the report.
3. To refresh the sales statistics for the day, click the message at the top of the workspace.
4. To filters the data, so 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, do one of the following:
      - Set **Period** to "Day," "Month," or "Year."
      - Choose the **From** / **To** dates from the Calendar .
   c. To print a report for a specific order status, set **Order Status** to "Specified," Then, choose the order status from the list.
   d. Set omit rows without data from the report, set **Empty Rows** to "No."
   e. 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, click **Show Report**. The report appears at the bottom of the page.

Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a coupon. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and "shipped" to complete the workflow.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

Process Overview:

Step 1: Enable Free Shipping

Step 2: Create the Shopping Cart Price Rule

Step 3: Test the Rule

Step 1: Enable Free Shipping

1. Enable the 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 the Shopping 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 settings as follows:
   a. Enter a **Rule Name** for internal reference.
   a. Enter a brief **Description** to describe the rule.
   b. Set **Status** to "Active."
   c. Set **Website** to "Main Website." (Click to make sure the entry is selected.)
   d. Select the **Customer Groups** to which the rule applies.
   e. Set **Coupon** to one of the following:

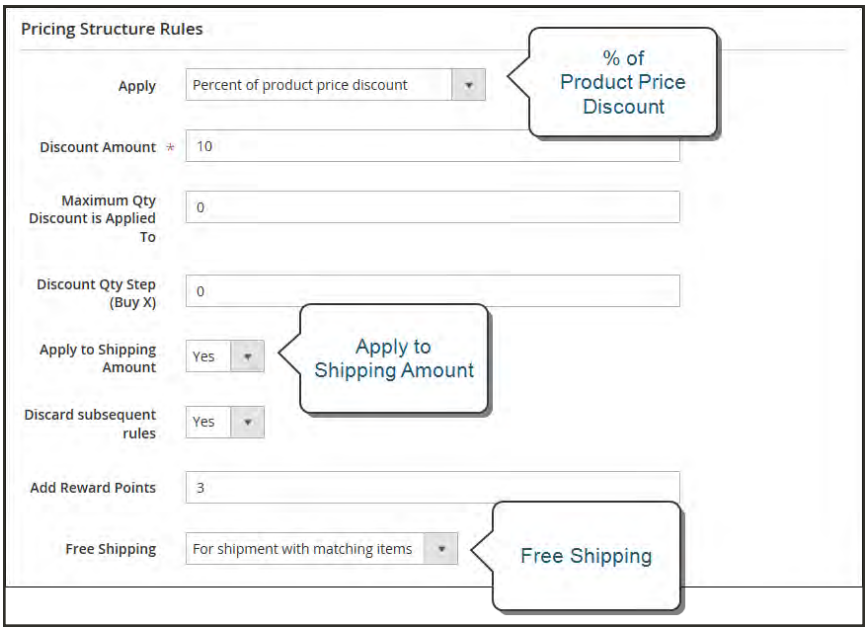
- To offer a free shipping promotion without a coupon, accept the default, "No Coupon" setting.
- To use a coupon with the price rule, select "Specific Coupon." If necessary, complete the instructions to set up a coupon.

2. In the panel on the left, select **Actions**. Then under Pricing Structure Rules, 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

3. In the panel on the left, select **Labels**. Then, do one of the following:

- Enter a **Default Rule Label for All Store Views**. This label is visible to the customer.
- If your store is available in multiple stores, enter **Store View Specific Labels** for each view.

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

Example 2: Free Shipping for Orders Over $Amount

1. Complete the **General Information** settings as described in the previous example.

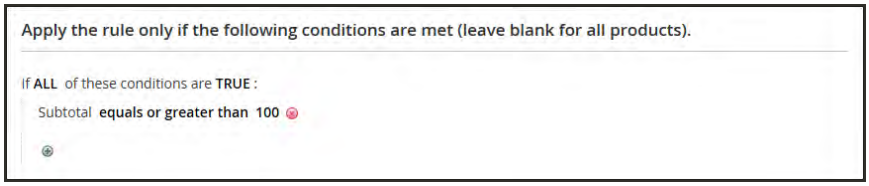
2. In the panel on the left, choose **Conditions**.

3. Click the **Add** button to insert a condition. Then, do the following:

   a. In the list under Cart Attribute, click **Subtotal**.

b. Click the underlined **is** link, and select "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

4. In the panel on the left, select **Actions**. 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."

5. In the panel on the left, select **Labels**. Then, do one of the following:

- Enter a **Default Rule Label for All Store Views**. The label is visible to the customer during checkout.
- If your store is available in multiple views, enter a label for each view, as needed.

6. When complete, tap **Save Rule**.

Step 3: Test the Rule

When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Buy X Get Y Free

This example shows how to set up a cart price rule for a "Buy X, Get Y Free" promotion. The format of the discount is as follows:

```
Buy X quantity of product, get Y quantity for free.
```

Process Overview:

Step 1: Create a Cart Price Rule

Step 2: Define the Conditions

Step 3: Define the Actions

Step 4: Complete the Label

Step 5: Apply the Rule

Step 1: Create a Cart Price Rule

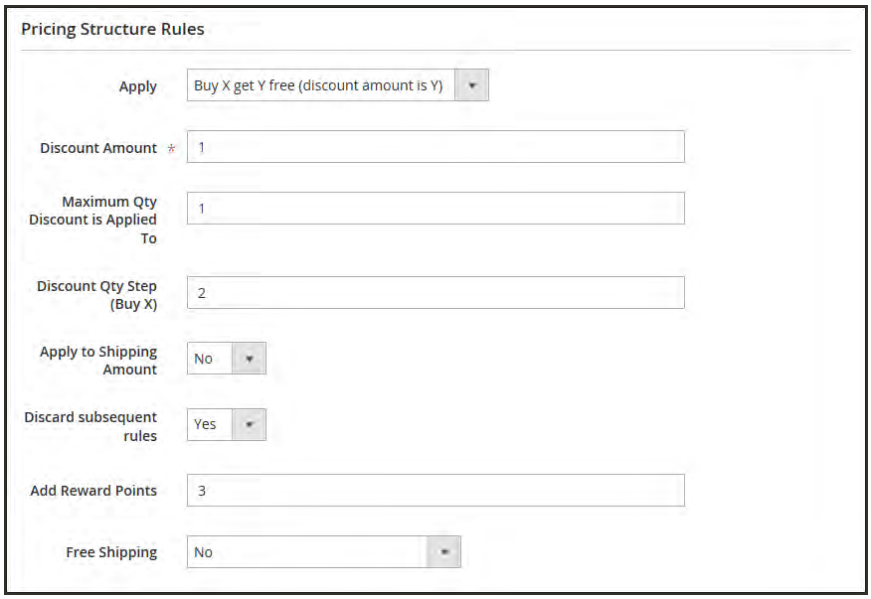
Complete Step 1 of the cart price rule instructions to complete the general information.

Step 2: Define the Conditions

Complete Step 2 of the shopping cart instructions to define the conditions for the price rule. The conditions can be triggered by purchasing a specific product, making a purchase of a certain amount, or any other scenario.

Step 3: Define the Actions

1. In the panel on the left, select **Actions**. Then, 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.



Buy X Get Y Free

2. Tap **Save and Continue Edit**. Then, complete the rest of the rule as needed.

Step 4: Complete the Label

Complete Step 4 of the cart price rule instructions to enter the label that appears during checkout.

Step 5: Apply the Rule

1. When complete, tap **Save Rule**.

   When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

Discount with Minimum Purchase

Cart price rules can be used to offer a percentage discount based on a minimum purchase. In the following example, a 25% discount is applied to all purchases over $200.00 in a specific category. The format of the discount is as follows:

```
X% off all Y (category) over $Z dollars
```

Process Overview:

Step 1: Create a Shopping Cart Rule

Step 2: Define the Conditions

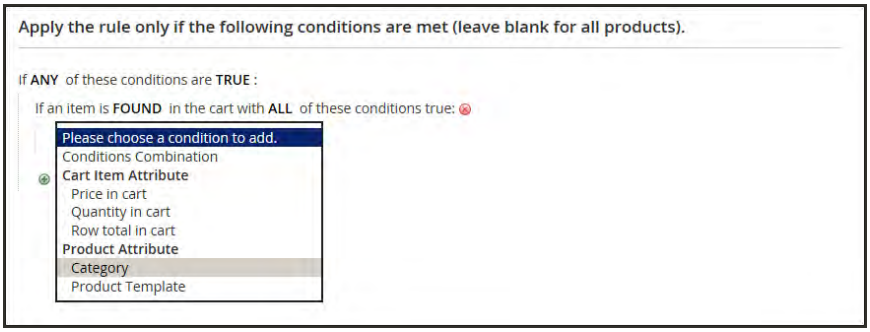
Step 3: Define the Actions

Step 1: Create a Shopping Cart Rule

Follow the basic instructions to create a cart rule.

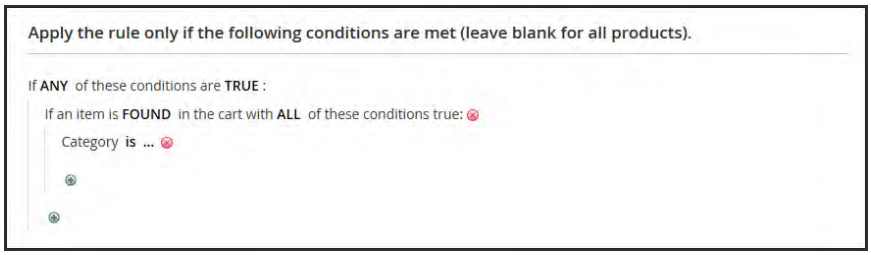
Step 2: Define the Conditions

1. In the panel on the left, select **Conditions**.
2. Click **Add** at the beginning of the next line, and choose **Product Attribute Combination**.
3. Click **Add** at the beginning of the next line. Then in the list under Product Attribute, choose **Category**.



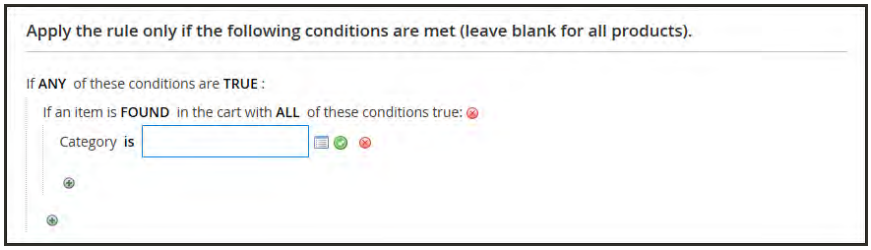
Choose Condition to Add

a. Click the ... "more" link to display additional options.



Category IS

b. Click the **Chooser** button to display the available categories. In the category tree, mark the checkbox of each category that you want to include. Then, press **Enter** to add the categories to the condition.



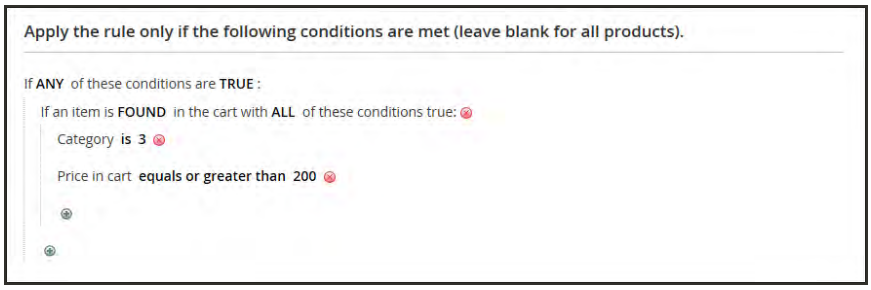
Category Tree

4. Click **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 first underlined parameter, IS. Then in the list, select "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 200.00.

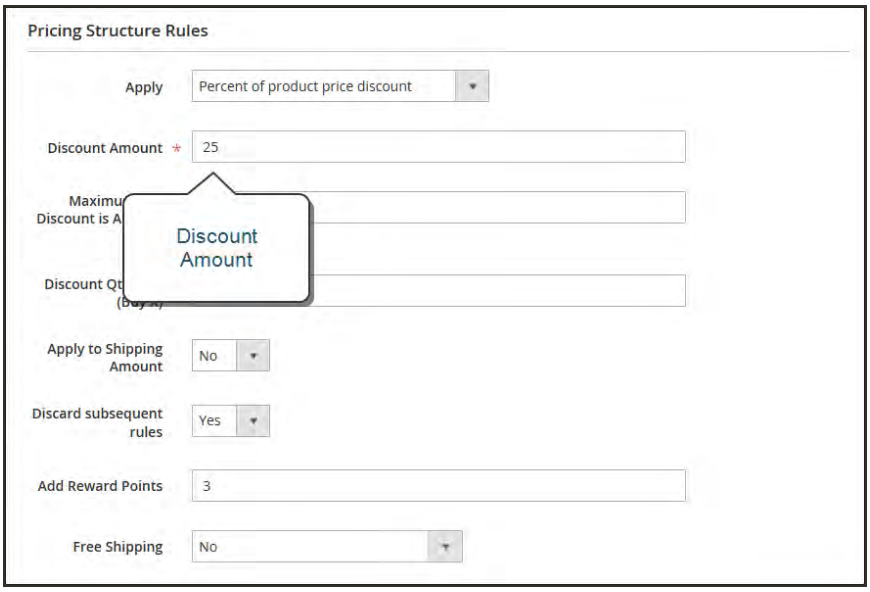


Enter the Price to Complete the Condition

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

Step 3: Define the Actions

1. In the panel on the left, select **Actions**. Then, do the following:



Actions

   a. Set **Apply** to "Percent of product price discount."

   b. Enter the **Discount Amount**. For example, enter 25 for a twenty-five percent discount.

   c. If you want to prevent the purchase from qualifying for additional promotions, set **Stop Further Rules Processing** to "Yes."

2. Tap **Save and Continue Edit** . Then, complete the rule as needed.

Notes

CHAPTER 20:

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

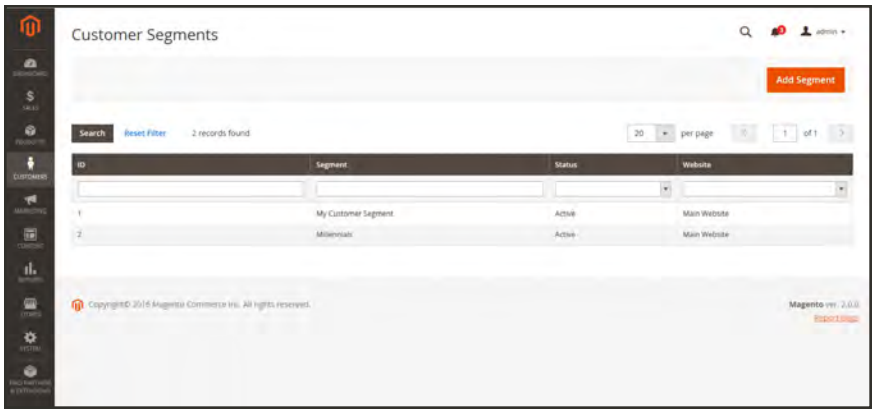
Customer segments are defined in a manner similar to shopping cart and catalog price rules. For an attribute to be used in a customer segment condition, the Use in Customer Segment property must be set to "Yes." Customer segment conditions can incorporate the following types of attributes:

Customer Segment Attributes

ATTRIBUTE	DESCRIPTION
Customer Address Fields	You can define any of the address fields, such as city or country. Any address in a customer's address book can match these conditions for the customer to match. Or, you can specify that only the default billing or shipping addresses can be used to match a customer. Customer address attributes are available only for customers who are logged in to their accounts.
Customer Information Fields	Miscellaneous customer information can be defined, including Customer Group, name, email, newsletter subscription status, and Store Credit balance. Customer information is available only for customers who are logged in to their accounts.
Cart Fields	Cart properties can be based on either quantity (line items or total quantity) or the value (grand total, tax, gift card, etc.) of the cart contents.
Products	You can reference products that are currently in the shopping cart or wish list, or that have previously been viewed or ordered. You can also set a date range for when this occurred. The products are defined using product attributes.
Order Fields	Order characteristics for past orders can be defined based on the billing/shipping address in the order, the total or average amount or quantity of the orders, or the total number of orders. You can also set a date range for when this occurred, and the order status of the orders that match these conditions. Available only for customers who are logged in. Conditions that are set for shoppers who are not logged in stop working when they log in.

Creating a Customer Segment

Creating a customer segment is similar to building a cart price rule, except that the options include customer-specific attributes.



Customer Segments

Process Overview:

Step 1: Enable Customer Segments

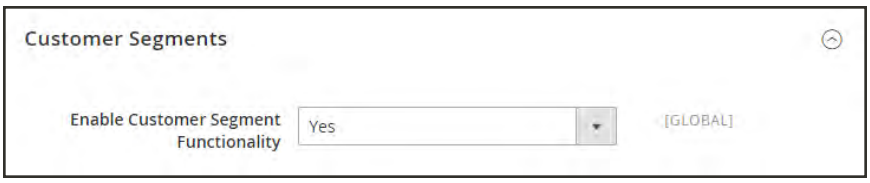
Step 2: Complete the General Setup

Step 3: Describe the Conditions

Step 4: Generate the List of Matched Customers

Step 1: Enable Customer Segments

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, tap **Customer Configuration**.
3. Expand the **Customer Segments** section.
4. Set **Enable Customer Segment Functionality** to "Yes."

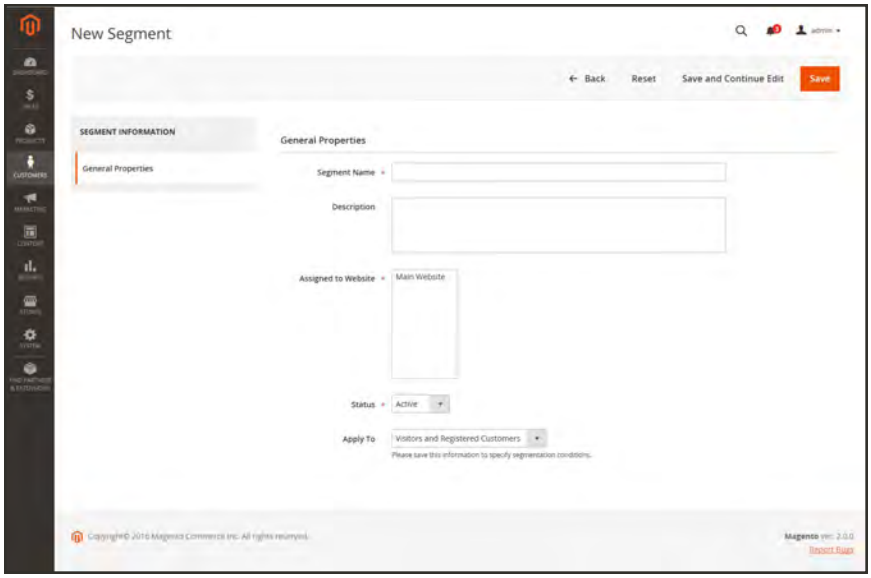


Customer Segments

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

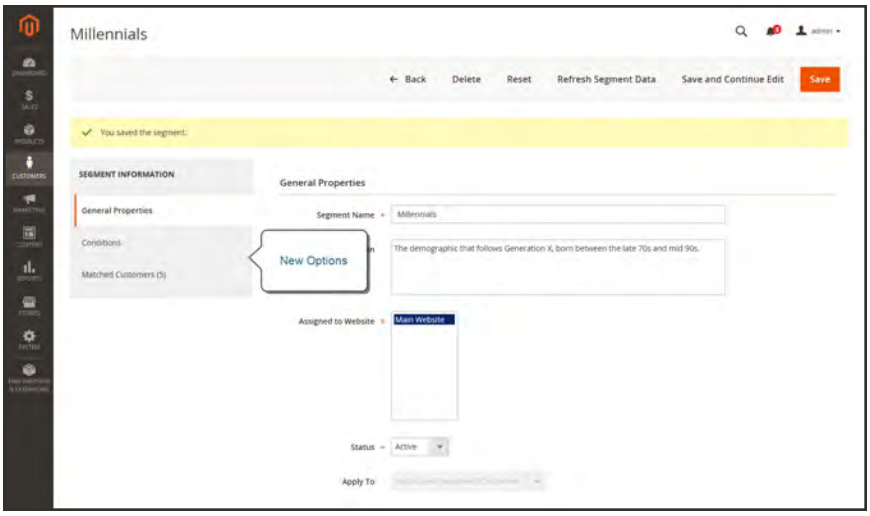
Step 2: Complete the General Setup

1. On the Admin sidebar, tap **Customers**. Then, choose **Segments**.
2. In the upper-right corner, tap **Add Segment**. Then, do the following:



New Segment

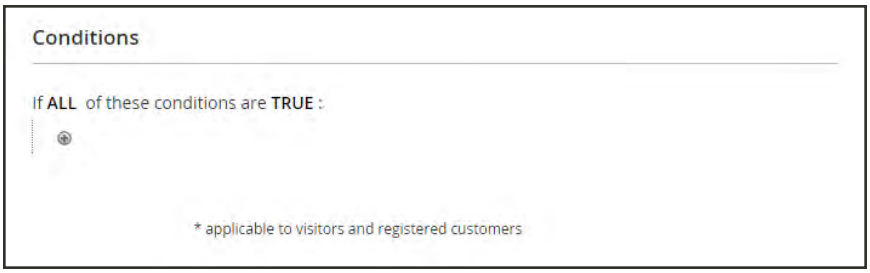
3. Complete the **General Properties** as follows:
   a. Enter a **Segment Name** to identify the customer segment when working in the Admin.
   b. Enter a brief **Description** that explains the purpose of the segment.
   c. Set **Assigned to Website** to the website where the customer segment can be used.
   d. To activate the customer segment, set **Status** to "Active."
   e. To identify the customers that this segment applies to, set the **Apply to** field to one of the following:
      - Visitors and Registered Customers
      - Registered Customers
      - Visitors
4. When complete, tap **Save and Continue Edit**. Additional options become available in the Segment Information panel.



Segment Information

Step 3: Describe the Conditions

1. In the panel on the left, choose **Conditions**. The condition begins, "If ALL of these conditions are TRUE:"



Conditions

2. To create a condition that targets the Millennium Generation, do the following:

   a. Tap **Add** ⊕ to display the list of conditions. Then, in the list under Customer, choose **Date Of Birth**.

   b. Click the **is** link, and choose "equals or greater than."

Equals or Greater Than

c. Click the default date value, and replace with the following: "1977-01-01". Then, click the green checkmark to save the setting.

d. On the next line, click **Add** . Then, in the list under Customers, again select **Date of Birth**.

e. Click the **is** link, and select "equals or less than."

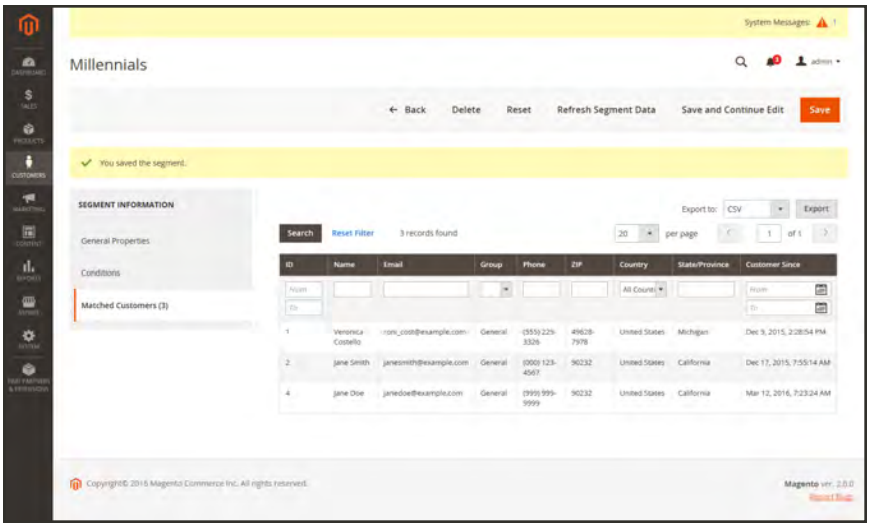
f. Replace the inserted date with the following: "1994-12-31". Then, click the green checkmark to save the setting.

Condition for Millennium Generation

3. Tap **Save and Continue Edit**.

Step 4: Generate the List of Matched Customers

1. In the panel on the left, select **Matched Customers** to generate a list of customers who match the condition.



Matched Customers

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

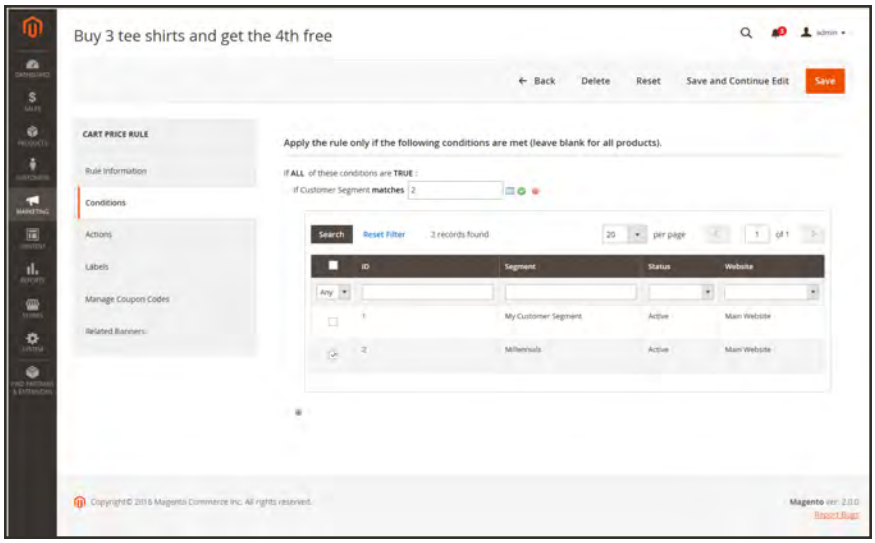
   The customer segment can now be used for targeting promotions, content, and mailings.

Field Descriptions

FIELD	DESCRIPTION
Segment Name	A name that identifies the segment for internal reference.
Description	A brief description that explains the purpose of the segment for internal reference.
Assigned to Website	The single website where the segment can be used.
Status	Activates and deactivates the segment. Any associated price rules and banners are deactivated when the segment is disabled. Options include: Active / Inactive.
Apply to	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: Visitors and Registered Customers — Includes all shoppers, regardless of whether they are logged in to an account. Registered Customers — Includes only shoppers who are logged in to an account Visitors — Includes only shoppers who are not logged in to an account.

Targeting Customer Segments in Price Rules

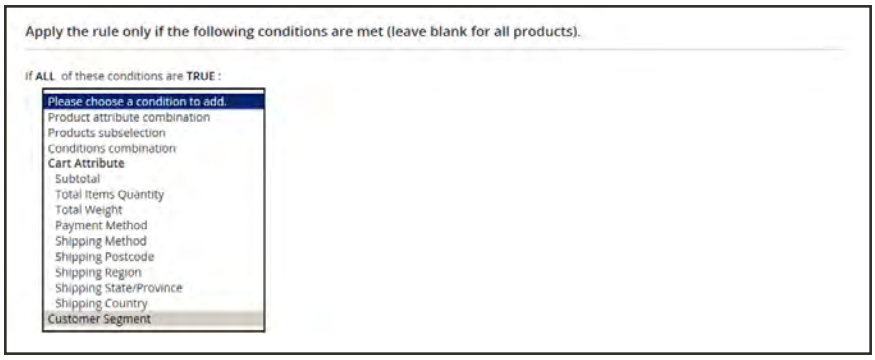
A customer segment can be targeted by associating it with a cart price rule and banner.



Targeted Customer Segment

To target a segment with a cart price rule:

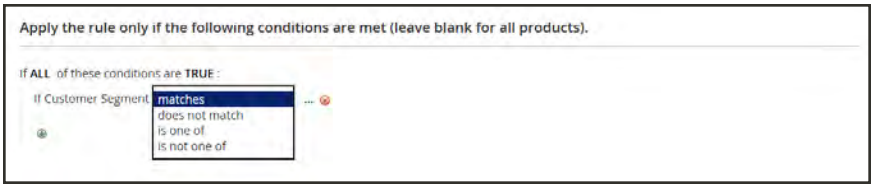
1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Do one of the following:
   - In the upper-right corner, tap **Add New Rule**.
   - Open an existing rule in edit mode.
3. In the panel on the left, choose **Conditions**. Then, complete the condition as follows:
   a. Tap **Add** to display the list of conditions. Then, choose **Customer Segment**.



Customer Segment

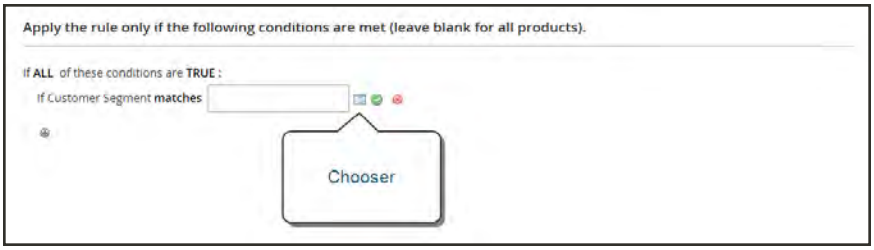
b. By default, the condition is set to find a matching condition. If needed, click the **matches** link, and change the operator to one of the following:

- does not match
- is one of
- is not one of



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.



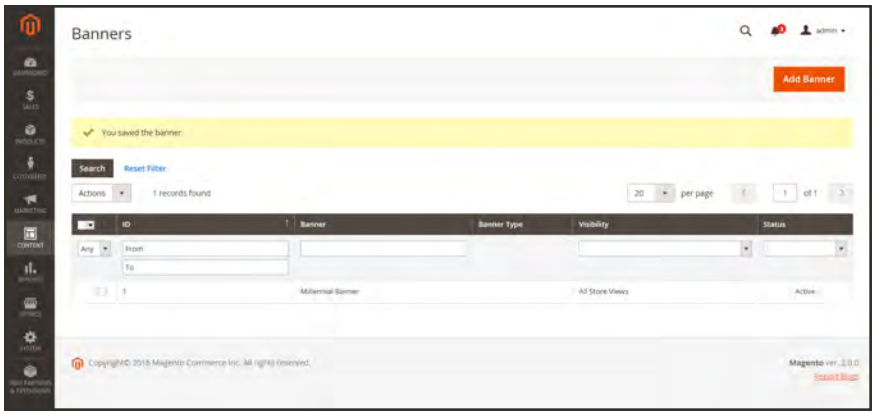
Chooser

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**.

Targeting Customer Segments with Banners

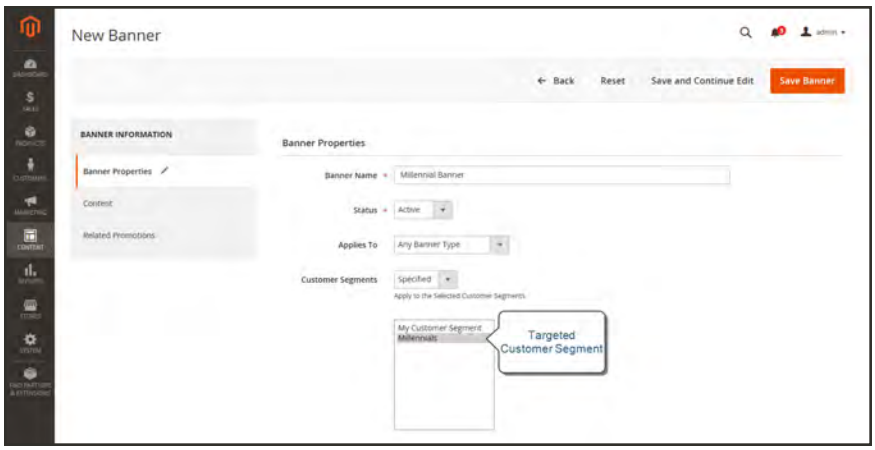
A banner can target a specific customer segment, and be incorporated into a cart price rule. Because customer segments are dynamic, the price rule can adjust to changes in customer activity.



Banners

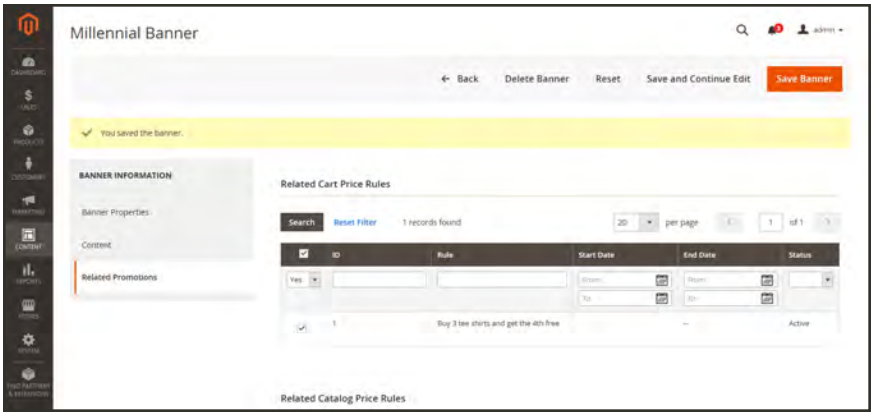
To associate a customer segment with a banner:

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.



Targeted Customer Segment

3. In the panel on the left, choose **Related Promotions**. Then, mark the checkbox of each related promotion.



Related Promotions

4. Update the other banner settings as needed.

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

Merchandising

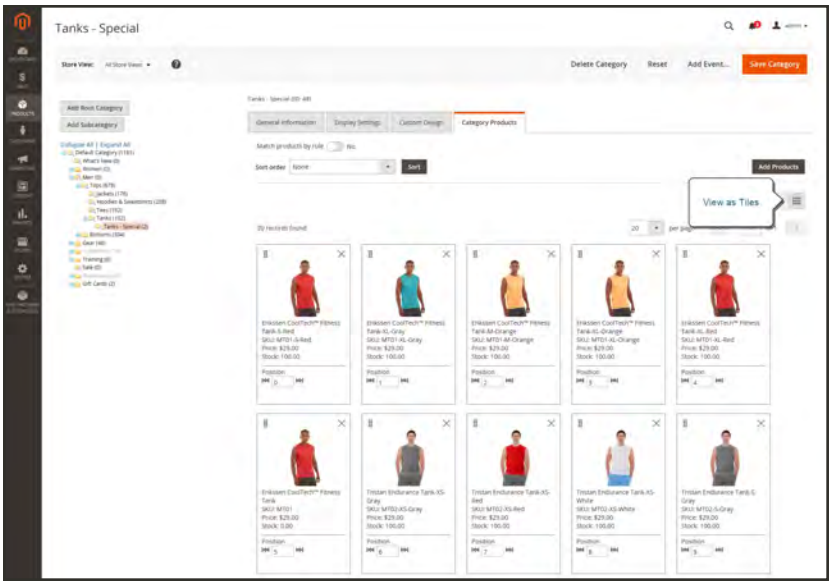
Merchandising is a term used in retail to describe the art and science of floor plan development and the presentation of products. In your Magento Enterprise Edition 2.0 store, you might think of the category-based navigation as the floor plan of the store, and the dynamic presentation of products as the conditions that you can apply to the listing of products in the store.

Contents

CHAPTER 21:

Visual Merchandiser

Visual Merchandiser is a set of advanced tools that allows you to position products, and apply conditions that determine which products appear in the category listing. The result can be a dynamic selection of products that adjusts to changes in the catalog. You have the option to work in "visual mode," which shows each product as a tile on a grid, or to work from a list of products in the category. The same tools are available in each mode, and you can use the buttons in the upper-right corner to toggle between each type of display.



Category Products Viewed as Tiles

To access Visual Merchandiser:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. Drill down through the category tree, and click the category that you want to edit.
3. Choose the **Category Products** tab.
4. Tap the **View as Tiles** button to display the products as a grid.
5. When complete, tap **Save Category**.

To change the position of a product:

1. Use the Sort Order and paginate tools to view the product that you want to move.

Method 1: Drag and Drop

Grab the **Drag** icon in the upper-right corner of the product tile, and drop the product into a position. The number of each product adjusts to reflect the new position.

Method 2: Set Position Value

In the **Position** field on the product tile, enter the number where you want the product to appear. Enter the number zero (0) to place the product at the top of the list.

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

Workspace Controls

CONTROL	DESCRIPTION
	View as List
	View as Tiles
No Yes	Match by Rule
	Drag
0	Position
	Remove from Category
20 per page	View Per Page
1 of 1	Go To Next / Previous

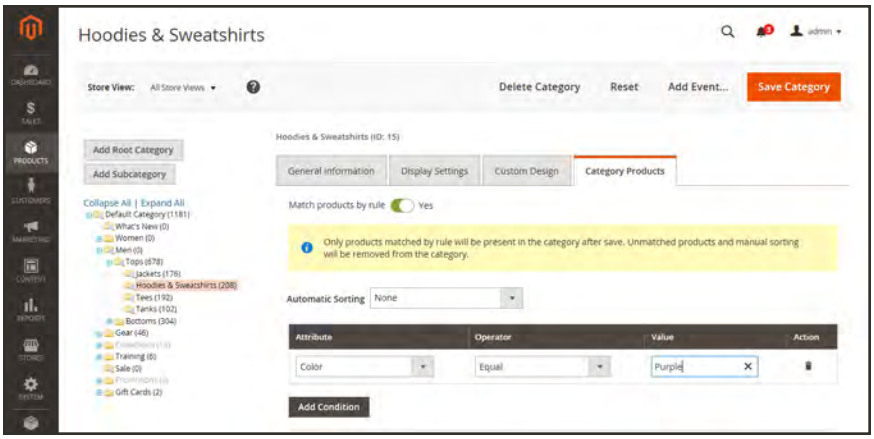
Creating Category Rules

Category rules dynamically change the product selection according to a set of conditions. Each category can have only one category rule, although the single rule can have multiple conditions. For example, you can create a category rule for a specific brand. Products of the same brand are automatically added to the list, even if they're not assigned to the same category. You can add as many conditions to the expression as needed to describe the products that you want to include.

Each condition consists of an attribute, value, and logical operator. Only attributes with the "Use in Product Listing" property set to "Yes" can be used in category rules. If you want to use an attribute that is not included in product listings, open the attribute in edit mode, and set "Use in Product Listing" to "Yes." Although Date attributes are not supported, you can use the Date Created or Date Modified attributes to define a date, or range of dates. For example, to include only products that were created during the past week, set Date Created to a value of "<7."

Category product rules can speed up the process of assigning specific products to categories, based on conditions that determine which products appear in the category. The attributes that can be used with category product rules are specified in the Visual Merchandiser configuration.

> Use caution when applying a category product rule, because any products that do not meet the condition are removed from the category. For example, if you create a rule that includes only purple tank tops, all other tank tops are removed from the category.



Category Product Rules

To create a category rule:

1. In the category tree, open the category to be edited.
2. On the **Category Products** tab, set **Match products by rule** to the ”Yes” position.

   The automatic sorting and condition options appear.

1. 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.
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.”
3. 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
4. When complete, tap **Save Category**.

Menu Options

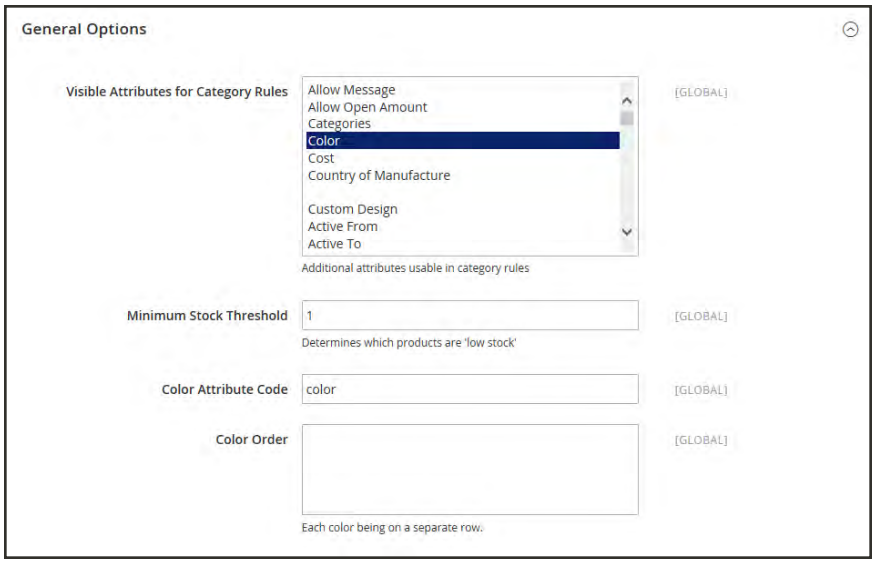
OPTION	DESCRIPTION
Match products by rule	Determines if the list of products in the category is dynamically generated by a category rule. Options: Yes / No
Automatic Sorting	Automatically applies a sorting order to the list of category products. Options:
Add Condition	Adds an additional condition to the rule.
CONDITIONS	
Attribute	Determines the attribute that is used as the basis of the condition. Options:

Menu Options (cont.)

OPTION	DESCRIPTION	
	Clone Category ID (s)	Dynamically clones products from multiple categories based on Category ID.
	Color	Includes products based on color..
	Date Created (days ago)	Includes products based on the number of days since the products were added to the catalog.
	Date Modified (days ago)	Includes products based on the number of days since the products were last modified.
	Name	Includes products based on the product name.
	Price	Includes products based on price.
	Quantity	Includes products based on the quantity in stock.
	SKU	Includes products based on SKU.
Operator	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	

Configuring Visual Merchandiser

The Visual Merchandiser configuration determines the attributes that can be used in the merchandising window, the minimum stock threshold, and identifies the attribute used for color, and the order of color values.



General Options

To configure Visual Merchandiser:

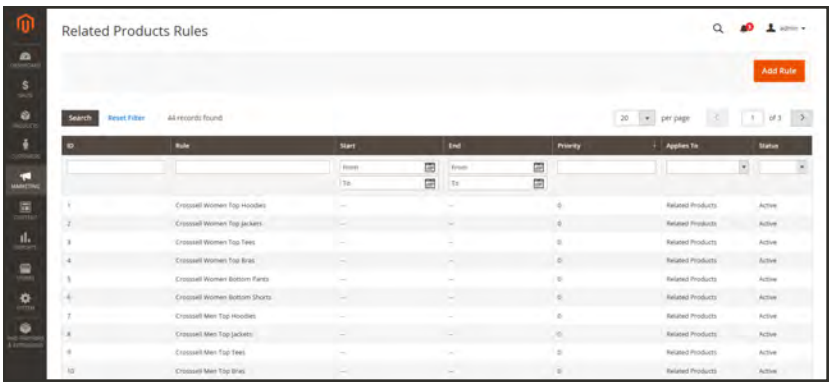
1. On the Admin sidebar, tap Stores. Then under Settings, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **Catalog**.
3. Expand the **Visual Merchandising Options** section. Then, do the following:
   a. In the **Attributes for Category Rules** list, select each attribute that you want to make available for visual merchandising. To choose multiple items, hold down the Ctrl key, and click each item.
   b. Enter the **Minimum Stock Threshold** for a product to appear in the Visual Merchandiser window.
   c. Enter the **Color Attribute Code**. The default value is `color`. If your catalog uses a different attribute, enter the attribute name in lowercase.
   d. In the **Color Order** box, enter each color value on a separate line and in sequence, to determine the priority of each color.
4. When complete, tap **Save Config**.

Notes

CHAPTER 22:

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

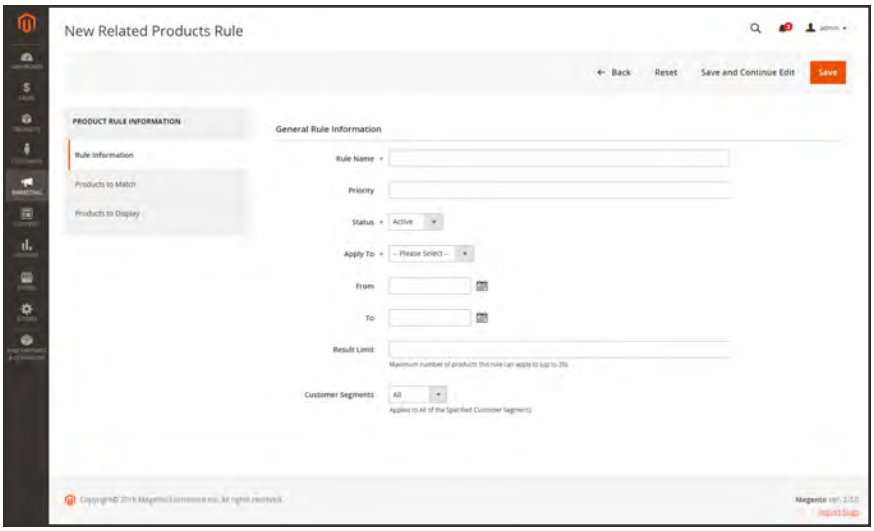
Creating a Related Product Rule

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 you want to display. At any given time, there might be a number of active rules that can be triggered to display related products, up-sells, and cross-sells. The priority of each rule determines the order in which the block of products appears on the page.

> For an attribute to be used in a targeted rule, the Use for Promo Rule Conditions property must be set to "Yes."

To create a related product rule:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Related Product Rules**.
2. In the upper-right corner, tap **Add Rule**.



Rule Information

3. Complete the **Rule Information** as follows:
   a. Enter a **Rule Name** to identify the rule when working in the Admin.
   b. In the **Priority** field, enter a number that determine the order that the results appear on the page, when results from other rules target the same location. Number 1 is top priority.
   c. To enable the rule, set **Status** to "Active."
   d. Set **Apply To** to one of the following:

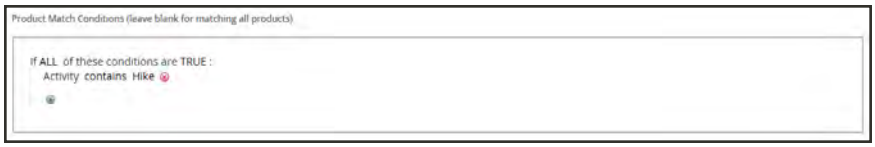
- Related Products
- Up-sells
- Cross-sells

e. If the rule is to be active for a specific range of time, enter the **From** and **To** dates.

f. In the **Result Limit** field, enter the number of records to appear in the results list. The maximum number is 20.

g. If the rule applies to a specific customer segment, set **Customer Segments** to "Specified." Then, choose the customer segment from the list.

4. In the panel on the left, choose **Products to Match**. Then, build the condition as you would for a catalog price rule.



Products to Match

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

Products to Display

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

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

Field Descriptions

FIELD	DESCRIPTION
Rule Name	A name that identifies the rule for internal use.
Priority	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.

```
[Result Limit] + [Configurable Maximum] = [Real Limit]
```

For example, suppose you have three rules, with a priority of one, two, and three.

- There are two matching products returned for Rule 1, six matching products for Rule 2, and twenty matching products for Rule 3.
- In the configuration, the Maximum Number of Products for Related Products List is set to six.

RULES	PRIORITY	MATCHING PRODUCTS
Rule 1	1	2
Rule 2	2	6
Rule 3	3	20

If the first rule returns more matching products than allowed by the "configurable maximum limit," but less than the "real limit," the matching products from the other existing rules are used—in order of priority—until the "real limit" is reached.

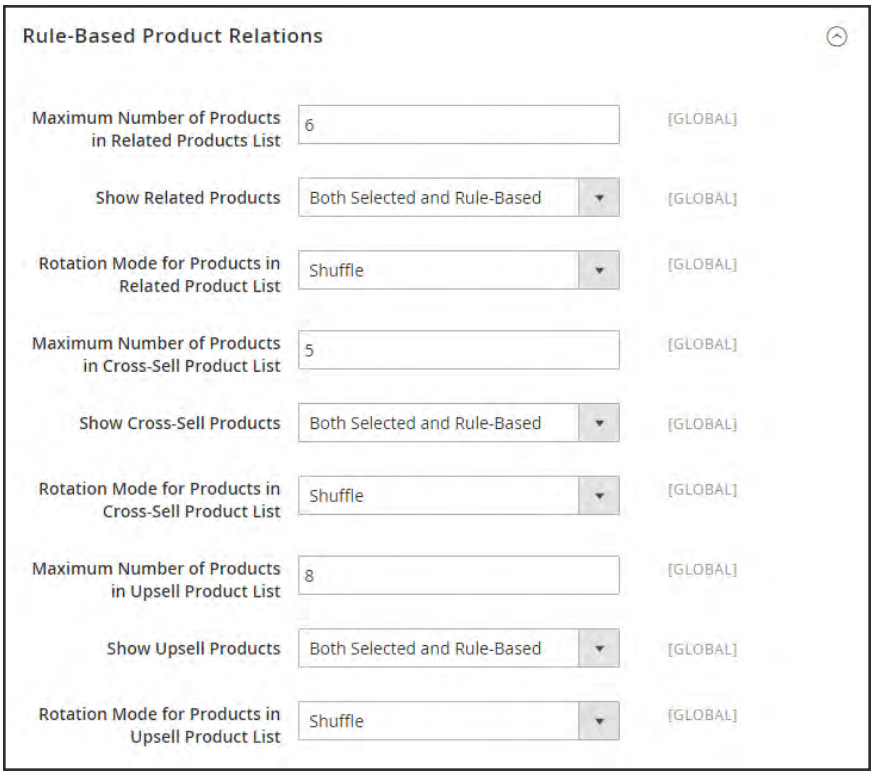
By priority, the matching products returned from Rule 1 can be used first to fill all twenty-six available slots. Because Rule 1 returned only two matching products, there is still room for twenty-four more. Rule 2 has the next highest priority, and returns six more matching products. There are now eighteen available slots to be filled. Rule 3 has the next level of priority, with enough matching products to fill the remaining eighteen slots. When all available slots are filled, and depending on the rotation mode that is set, the list might be shuffled, and then reduced to the "configurable maximum limit." In this case, the remaining six products appear in the store.

Configuring Related Products Rules

The behavior and display of product relationship rules is determined by the configuration settings. The settings determine how many products that match the rule can be displayed, and the order in which they appear.

To configure rule-based product relations:

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



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**.

Notes

Customer Engagement

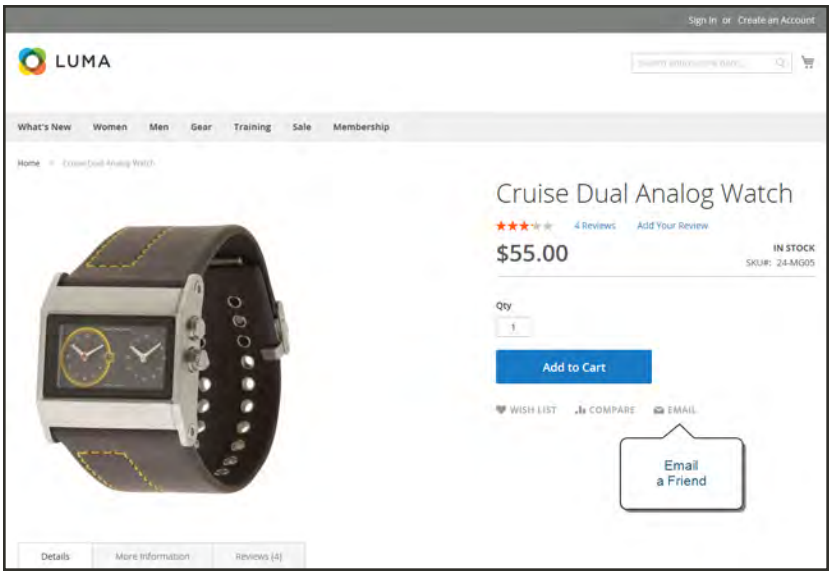
Use Magento's tools for customer engagement to encourage customers to interact with your store, and share with their friends and family. Add value with incentives to land new customers and increase in-store sales.

Contents

CHAPTER 23:

Email a Friend

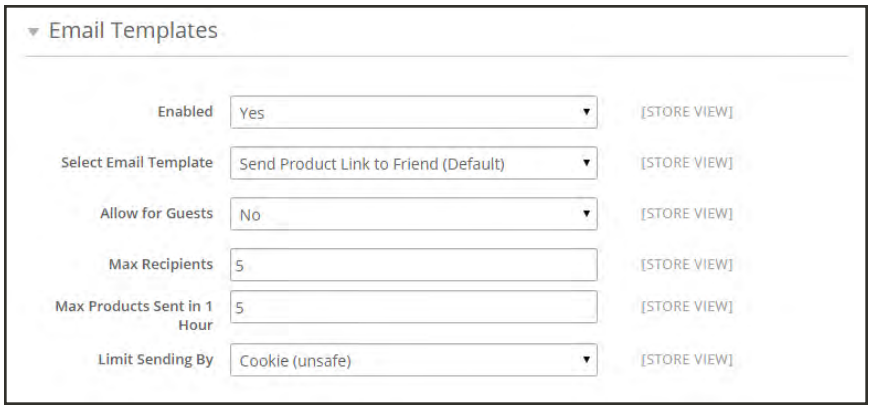
The Email a Friend link makes it easy for your customers to share links to products with their friends. In the Magento demo store, the Email a Friend link appears as an envelope icon. The message template can be customized for your voice and brand. To prevent spamming, you can limit the number of recipients for each email, and the number of products that can be shared over a one-hour period.



Email a Friend

To configure Email a Friend:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Email to a Friend**.
3. Expand the **Email Templates** section. Then, do the following:



Email Templates

   a. Set **Enabled** to "Yes."
   b. Set **Select Email Template** to the template you want to use as the basis of the messages.
   c. If you want to require that only registered customers can send email to friends, set **Allow for Guest**s 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:

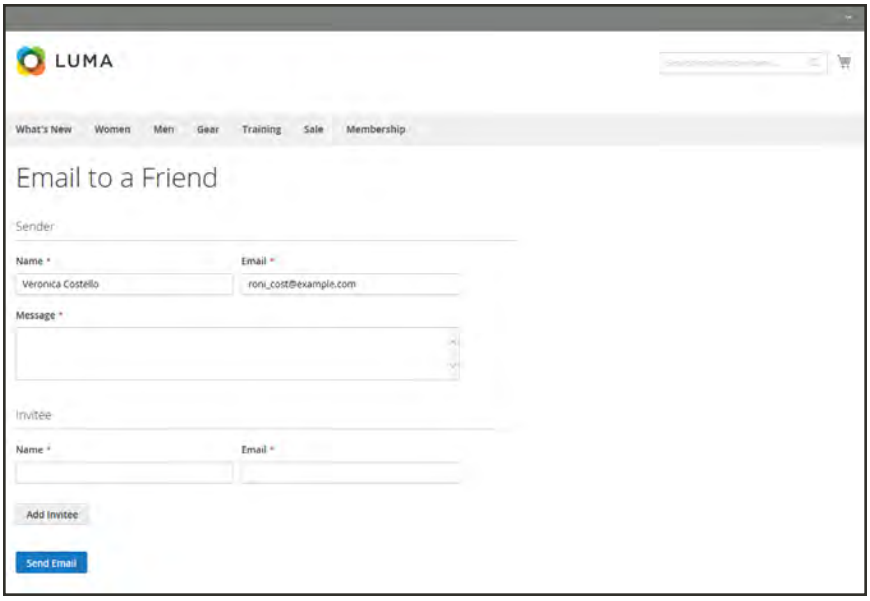
IP Address	(Recommended) Identifies the sender by the IP address of the computer that is used to send the emails.
Cookie (unsafe)	Identifies the sender by browser cookie. This method is less effective because the sender can delete the cookie to bypass the limit.

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

Notes

CHAPTER 24:

Wish Lists

A wish list is a list of products that registered customers can share with friends or transfer to their shopping carts at a later date. When wish lists are enabled, the Add to wish list link appears on the category and product pages of your store. Depending on the theme, it might be a text link or a graphic image.

Shared wish lists are sent from a store email address, but the body of the message contains a personalized note from the customer. You can customize the email template that is used for the notification message when wish lists are shared, and choose the store contact that appears as the sender.

Customers can update their wish lists from their account dashboard, and transfer products to the shopping cart. Items can be transferred between the wish list and shopping cart by the customer or from the Admin. In addition, you can update a customer's wish list from the Admin.

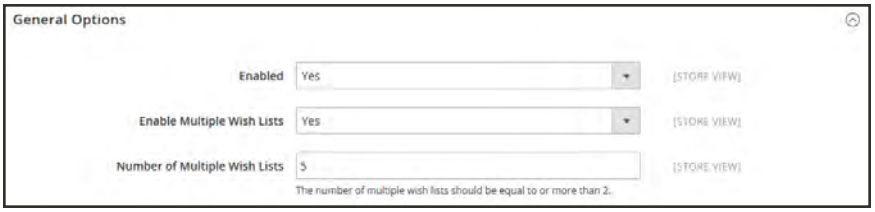
When a product with multiple options is added to a wish list, any options that have been selected by the customer are included in the wish list item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wish list item. On the other hand, if the customer adds the same product to the wish list multiple times, the product appears in the wish list only once, but with an updated quantity that reflects the number of times the product was added.

Configuring Wish Lists

The configuration enables wish lists, and determines the email template and sender of email messages that are sent when a wish list is shared.

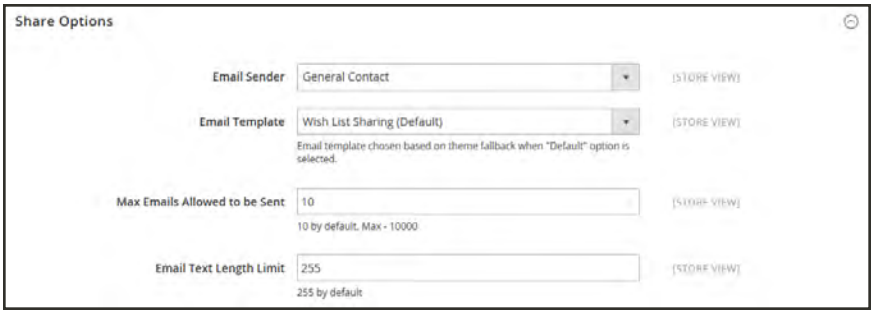
To configure the wish list:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers,** choose **Wish List**.
3. Expand the **General Options** section, and do the following:
   a. Verify that **Enabled** is set to "Yes."
   b. If you want customers to be able to create and manage multiple wish lists, set **Enable Multiple Wish Lists** to "Yes." Then, enter the **Number of Multiple Wish Lists** that each customer can maintain.



General Options

4. Expand the **Share Options** section, and do the following:



Share Options

a. Set **Email Sender** to the store contact that appears as the sender of the notification.

b. Set **Email Template** to the template to be used for the notification that is sent when a customer shares a wish list.

c. In the **Max Emails Allowed to be Sent** field, enter the maximum number of invitations to view a shared wish list that a customer can send at a time. The default is 10.

d. In the **Email Text Length Limit** field, enter the maximum number of characters that can be included in the wiish list sharing message.

5. Expand the **My Wish list Link** section. Then, set **Display Wish Lists Summary** to one of the following:

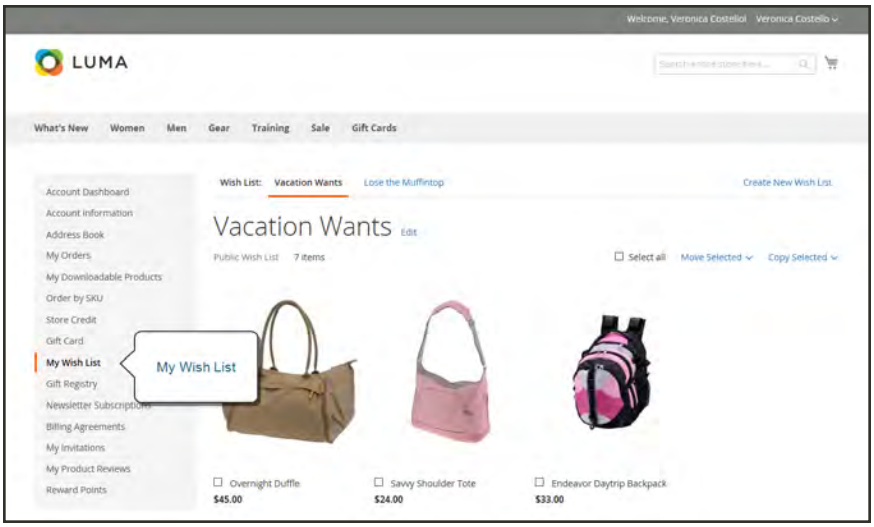
- Display number of items in wish list
- Display item quantities

My Wish Lists Link

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

Updating a Wish List

Customers can manage their wish lists by logging in to their accounts. Store administrators can also manage customer wish lists from the Admin.



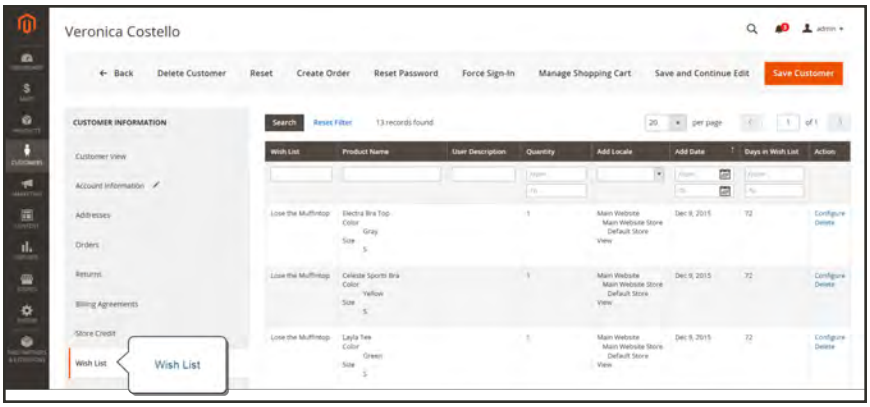
"My Wish List" in Customer Account

To update the wish list from a customer account:

1. Log in to your customer account. Then in the panel on the left, choose **My Wish List**.
2. Find the item you want to edit in the wish list, and do any of the following:
   - Update the Qty.
   - Edit the product options.
   - Add a comment.
   - Add to Gift Registry.
   - Move or Copy to a New Wish List.
   - Delete the item from the wish list.
   - Add to Cart
3. When complete, tap **Update Wishlist**.

To update wish list items from the Admin:

1. On the Admin sidebar, tap Customers. Then choose ,**All Customers**.
2. Find the customer in the list. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose **Wish List**. Then, find the item to be edited in the list. Any options selected for the product appear below the product name.

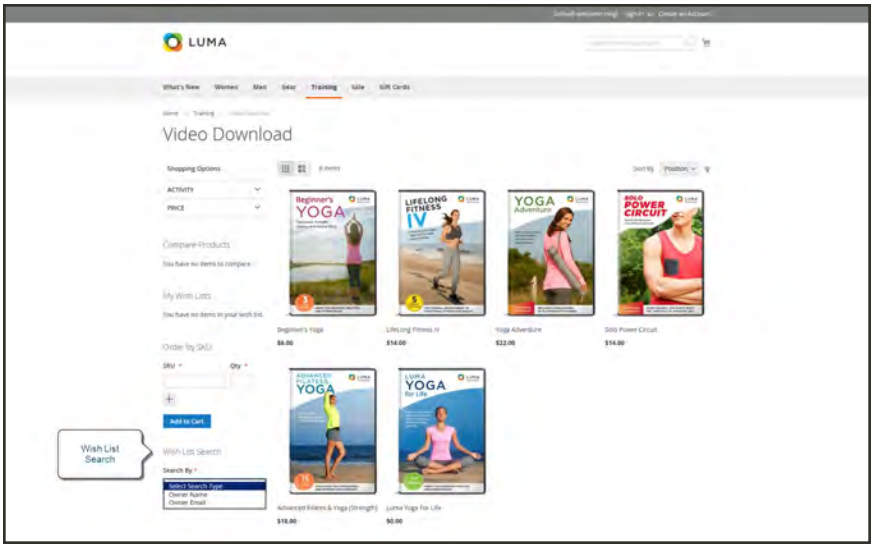


Wish List from Admin

4. To edit the product options, do the following:
   a. In the **Action** column, click **Configure**.
   b. Click **Configure**.
   c. On the product page, update the options and **Quantity** as needed.
5. When complete, tap **Update Wishlist**.

Wish List Search

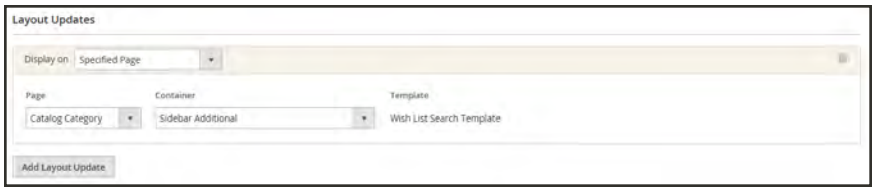
Any public wish list can be found using the Wish List Search widget. The widget enables a customer to search by the name or email address of the wish list owner. Store customers can find wish lists that belong to other customers, view them and order products from them, or add the products to their own wish lists. If an item it purchased from a public wish list by another customer, it is not removed from the original wish list. The Wish List Search widget can be added to any page of your store to make it easy for customers to find the wish lists of friends and family members.



Wish List Search

To add a Wish List Search widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then, in the **Settings** section, do the following:
   a. Set **Type** to "Wishlist Search."
   b. Set **Design Package/Theme** to the theme of the store where the wishlist will be added.
   c. Enter the **Widget Title**.
   d. Set **Assign to Store Views** to the view or website where the widget is to be used.
   e. In the **Layout Updates** section, tap **Add Layout Update**. Then, specify where you want the widget to appear.



Layout Update

3. In the panel on the left, choose **Widget Options**. Then, do the following:
4. Set **Quick Search Form Types** to one of the following:

All Forms	Customers can search by all available parameters.
Owner Name	Customers can search for wish lists by owner name.
Owner Email	Customers can search for wish lists by owner email address.

> Shipping addresses are not included in wish lists.

5. Configure the remaining widget properties as needed, following the standard instructions.
6. When complete, tap **Save**.
7. When prompted, refresh all invalid caches.

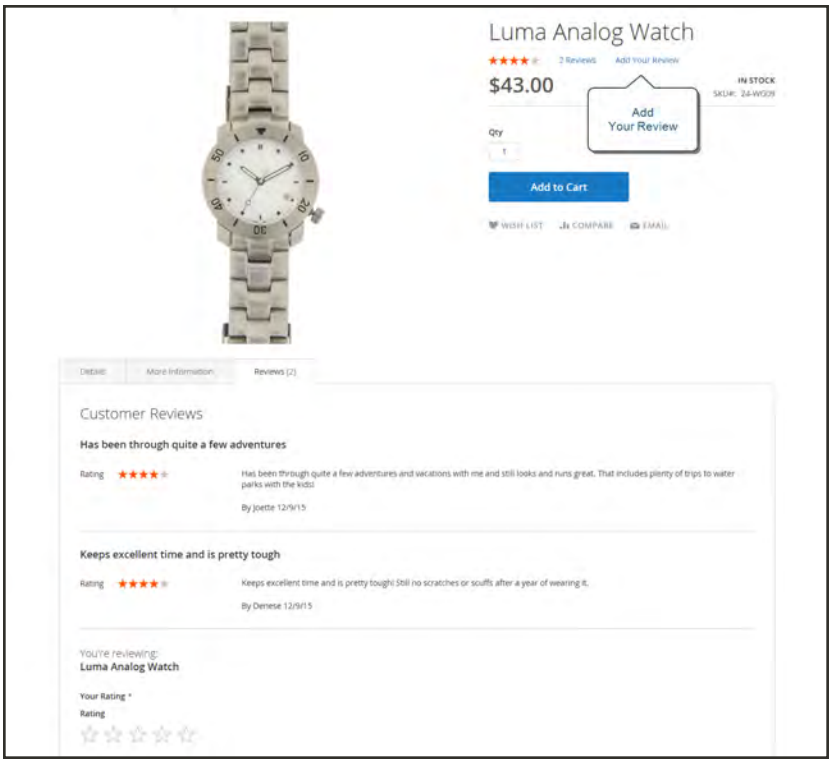
Notes

CHAPTER 25:

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.

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 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.



Add Your Review

Configuring Product Reviews

The configuration determines whether customers must open an account with your store before they can write a product review, and also determines whether guests can submit reviews. Requiring reviewers to open an account with your store prevents anonymous submissions, and can improve the quality of reviews.

To configure product reviews:

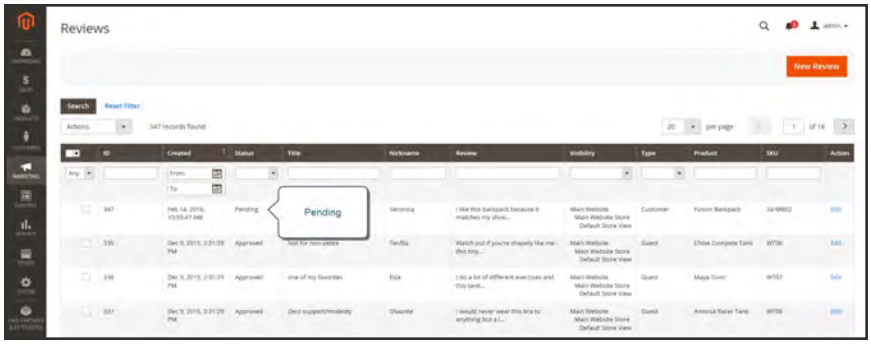
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Product Reviews** section, and do the following:

Product Reviews

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**.

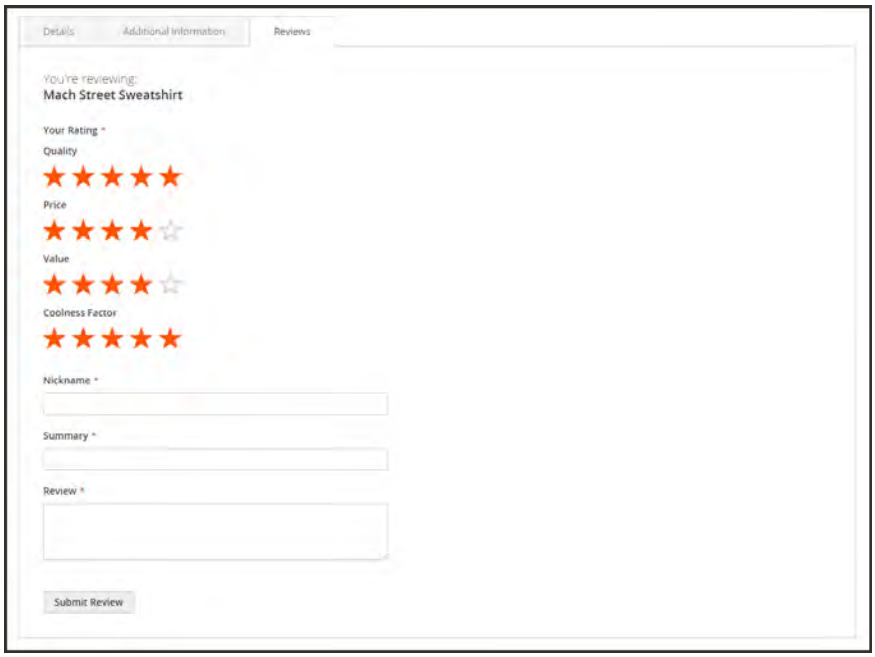


Pending Product Review

2. In the list, click a pending review to view the details, and edit if necessary.
3. To approve a pending review, change the **Status** from “Pending” to “Approved.” To reject a review, select “Not Approved.”
4. When complete, tap **Save Review**.

Product Ratings

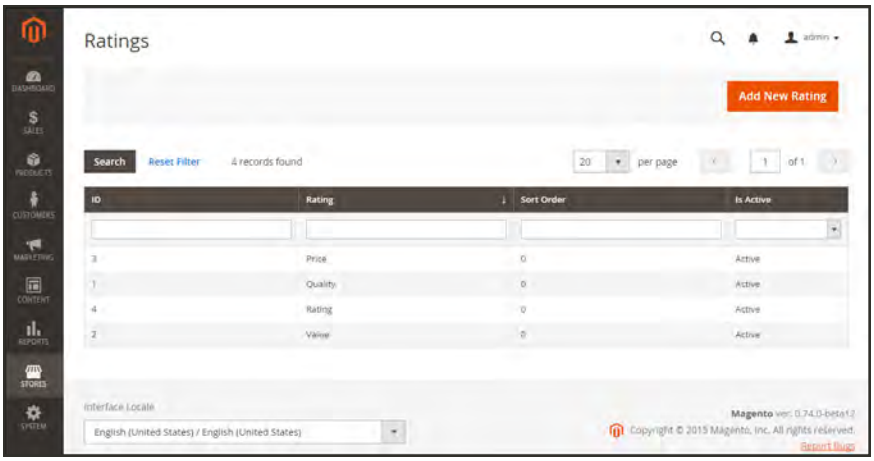
When customers review a product, the default ratings are quality, price, and value. In addition to these, you can add your own custom ratings. The five-star ratings that appear on catalog pages are averaged for each product.



Ratings

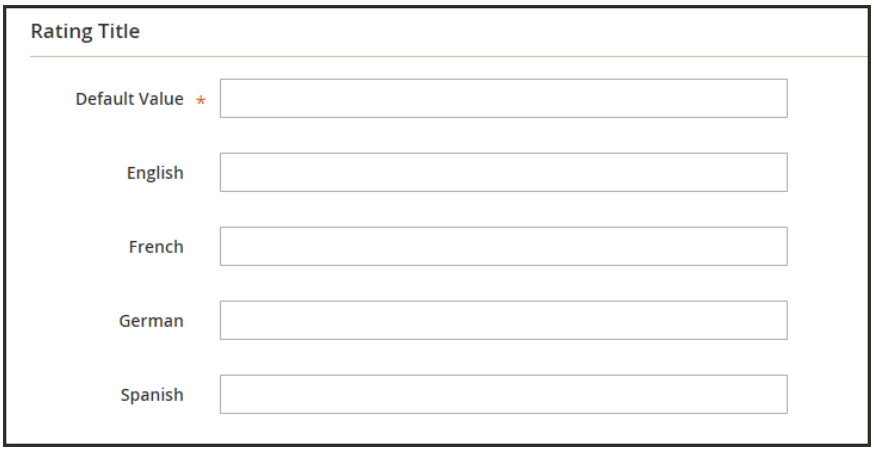
To create your own ratings:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Ratings**.
2. In the upper-right corner, tap **Add New Rating**.



Ratings

3. In the Rating Title section, enter the **Default Value** for the new rating. If applicable, enter the translation for each store view.



Rating Title

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.)

   A rating will not be visible unless it is 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

6. When complete, tap **Save Rating**.

Notes

CHAPTER 26:

Gift Registries

Magento Enterprise Edition 2.0 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.

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 Frontend App tool can be used to place a gift registry quick search box 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. **Store gift registry is configured.** The store administrator enables the gift registry, and sets up the registry type and attributes.

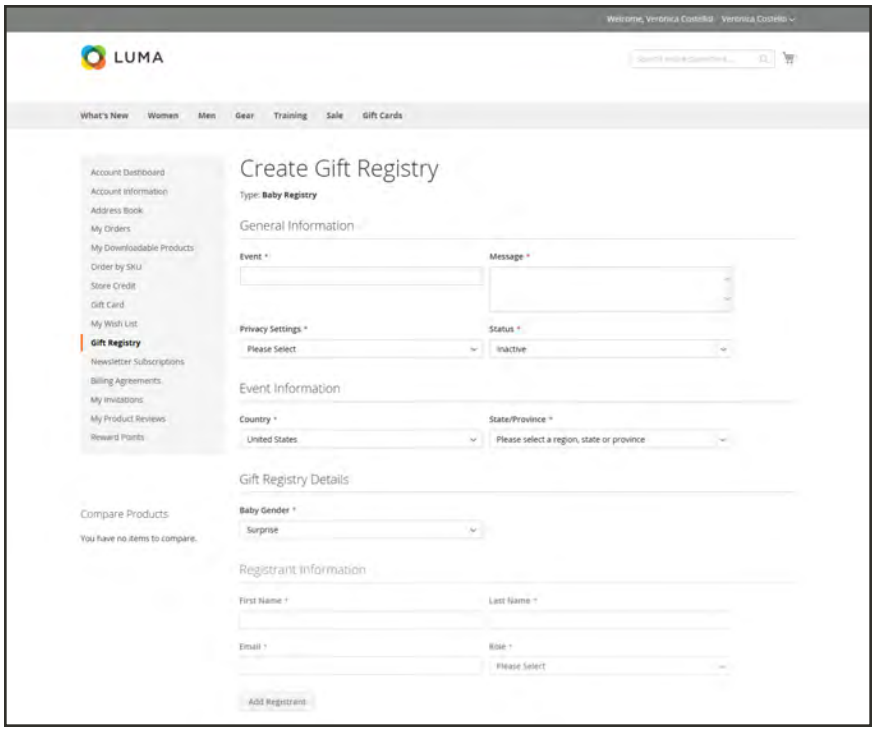
2. **Customers create their own registries.** A customer creates a new gift registry from their store account for an upcoming occasion, and completes the required fields in each section of the gift registry. After adding items to the registry, it is shared with friends and family who are referred to as “invitees.”

3. **Invitations are sent.** Each invitee receives an email invitation with a the link to visit the gift registry. A invitee can place an order for any item in the gift registry.

4. **Orders are placed.** 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

SECTION	DESCRIPTION
General Information	The General Information section typically includes the name of the event, a message or description of the event, privacy settings, and event status.
Event Information	The Event Information section includes the location and date of the event. For a wedding, it might also include the number of guests each person can bring.
Gift Registry Details	The Gift Registry Details might include additional information that is specific to the occasion.

Gift Registry Sections (cont.)

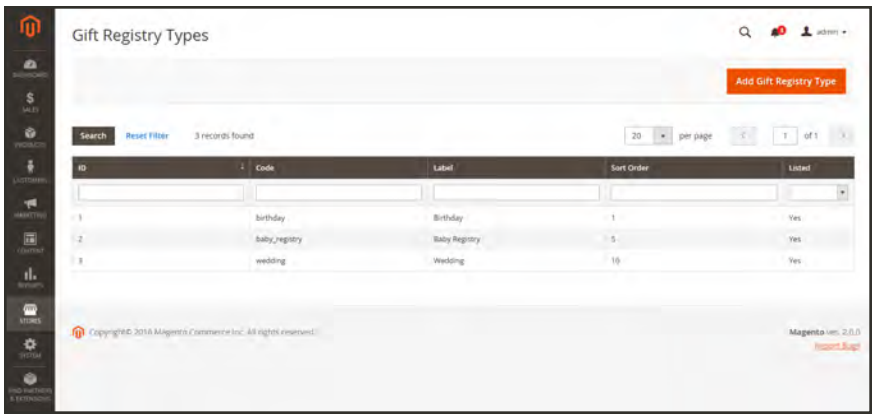
SECTION	DESCRIPTION
Registrant Information	The Registrant Information section includes the name and contact information of each person who is to receive notification of the registry. For a wedding registry, the Role field might be included to associate the registrant as a friend of the bride or groom.
Shipping Address	The Shipping Address section shows where gifts are to be sent, and includes the information a carrier needs to deliver the package.

Setting Up a Gift Registry

A gift registry can be created for any type of event, such as a wedding, birthday, anniversary, new baby, or any other special occasion. By default, Magento includes the following special events:

- Baby
- Birthday
- Wedding

When you create a new registry, it becomes an option in the list of gift registry types in the customer's account.



Gift Registry Types

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.

To use a prepared gift registry:

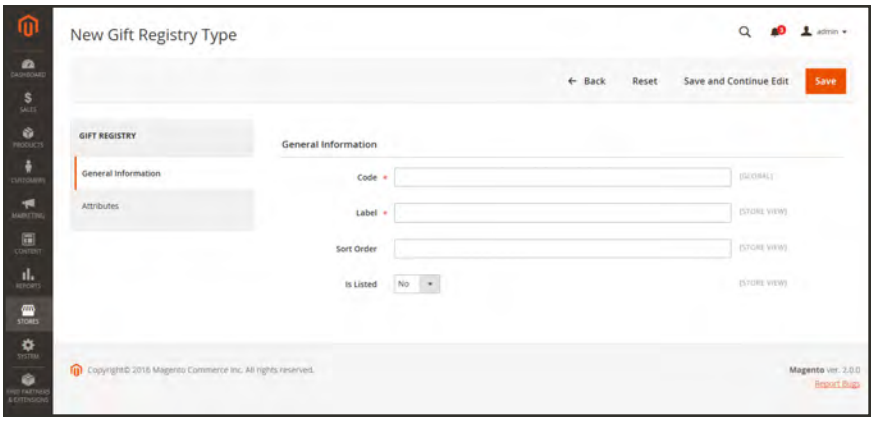
1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Registry**.

   The birthday, wedding, and baby registries are ready for customers to use from their accounts.

2. Make sure to complete the configuration, so the email templates 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 gift registry types.
   d. To activate the gift registry, set **Is Listed** to "Yes."



General Information

4. Take a look at 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:

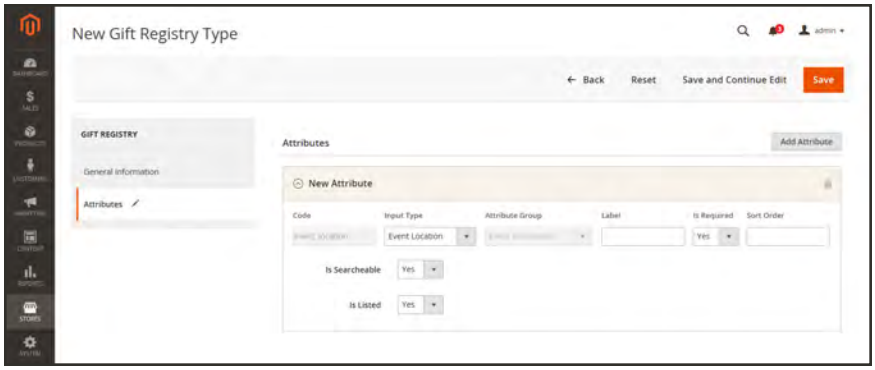
a. Assign a unique **Code** to identify the attribute internally. The code can be up to fifteen characters in length, and must begin with a lowercase letter. The rest of the code can include lowercase letters(a-z), numbers (0-9) and the underscore (_) character to separate words.

b. Set **Input Type** to the control to be used for data entry. You can choose one of the custom types or a static type.

If the input type has multiple options, tap **Add New Option**. Then complete the following information for each option:

- Code
- Label
- Is Default

Some attribute 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.



Attribute with Multiple Options

To add another option, tap **Add New Option**. Each new option added appears in a new section at the top.

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.

g. Repeat this process for each new attribute.

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

Field Descriptions

ATTRIBUTE	DESCRIPTION
GENERAL INFORMATION	
Code	A unique name to identify the gift registry type internally. The first character of the code must be a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).
Label	The name of the gift registry type that appears in the store.
Sort Order	Determines the sequence in which this gift registry type appears when listed with other types.
Is Listed	Determines if the gift registry type is available to customers in the store. Options: Yes / No.
ATTRIBUTES	
Code	A unique name to identify the attribute internally.The code can include any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).
Input Type	Determines the type of data and input control that is associated with the attribute, according to type. Options: **Custom Types** Text — Displays the attribute as a text field. Select — Displays the attribute as a drop-down list. Date — Displays the attribute as a date field. Country — Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No. **Static Types** Event Date — Determines how the date attribute is used in the store. Options:

Field Descriptions (cont.)

ATTRIBUTE	DESCRIPTION	
	Searchable	Determines if the attribute is available for Advanced Search. Options include: Yes / No.
	Is Listed	Determines if the event is included in the list of events that is available in the store. Options include: Yes / No.
	Date Format	Determines the format of the event date. Options include: Short (3/23/2014) Medium (Mar 23, 1914) Long (March 23, 1914) Full (Sunday, March 23, 2014)
	Event Country	Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No.
	Event Location	The location of the event that is related to the gift registry.
	Role	The role that identifies who the gift is for. For example, "Bride," "Groom," or "Partner."
Attribute Group	Select the group where the attribute is listed in the gift registry. Options:	
	Event Information	Groups all gift registry attributes that add the information about the gift registry event, its time, place, etc.
	Gift Registry Properties	Combines all attributes that add information directly about the gift registry.
	Privacy Settings	Lists the attributes that add information about the gift registry event privacy.
	Recipients Information	Groups the attributes that provide information about the person who creates a gift registry.

Field Descriptions (cont.)

ATTRIBUTE	DESCRIPTION
Label	The name that identifies the attribute in the customer's account dashboard.
Is Required	Indicates if the attributes is a required entry. The gift registry cannot be saved until all required attributes are complete. Options: Yes / No.
Sort Order	Determines the sequence in which attribute appears when listed with other attributes.

Configuring Gift Registries

Before you can offer gift registries to your customers, you must enable gift registries and configure the related email notifications. Magento sends the following email notifications in response to events in the gift registry workflow.

- When a new gift registry is created, an email is sent to the owner with a link to registry that can be shared.
- Optionally, the store can send notification to friends and family of the gift registry owner, with a link to the gift registry.
- The owner is notified when items are purchased from the gift registry, but does not indicate the purchaser.

Magento has predefined templates for each of these email messages that can be customized for your brand.

Process Overview:

Step 1: Enable Gift Registries

Step 2: Configure Email Notifications

Step 1: Enable Gift Registries

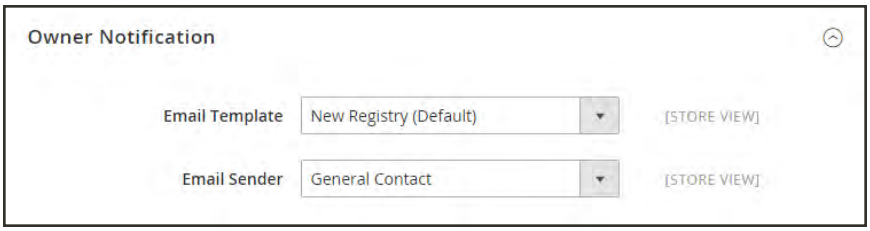
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Gift Registry**
3. Expand the **General Options** section, and do the following:

General Options

   a. The Gift Registry is enabled by default. If necessary, set **Enable Gift Registry** to "Yes."
   b. In the **Max Recipients Limit** field, enter the maximum number of people that can be invited to participate in a gift registry event.

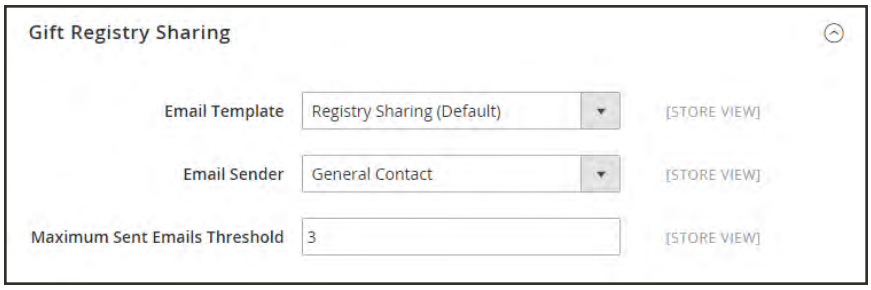
Step 2: Configure Email Notifications

1. Expand the **Owner Notification** section, and do the following:



Owner Notification

   a. Choose the **Email Template** that notifies gift registry owners when their registries are created.
   b. Choose the store identity that appears as the **Email Sender** of the message.
2. Expand the **Gift Registry Sharing** section, and do the following:



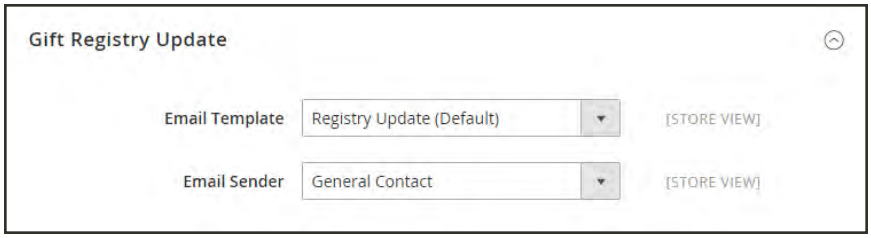
Gift Registry Sharing

a. Choose the **Email Template** that notifies gift registry recipients when a registry is shared with them.

b. Choose the store identify that appears as the **Email Sender** of the message.

c. In the **Max Emails Allowed to be Sent at One Time** field, enter the maximum number of emails that can be sent in a batch.

3. Expand the **Gift Registry Update** section, and do the following:



Gift Registry Update

a. Choose the **Email Template** that notifies gift registry owners of changes to the registry.

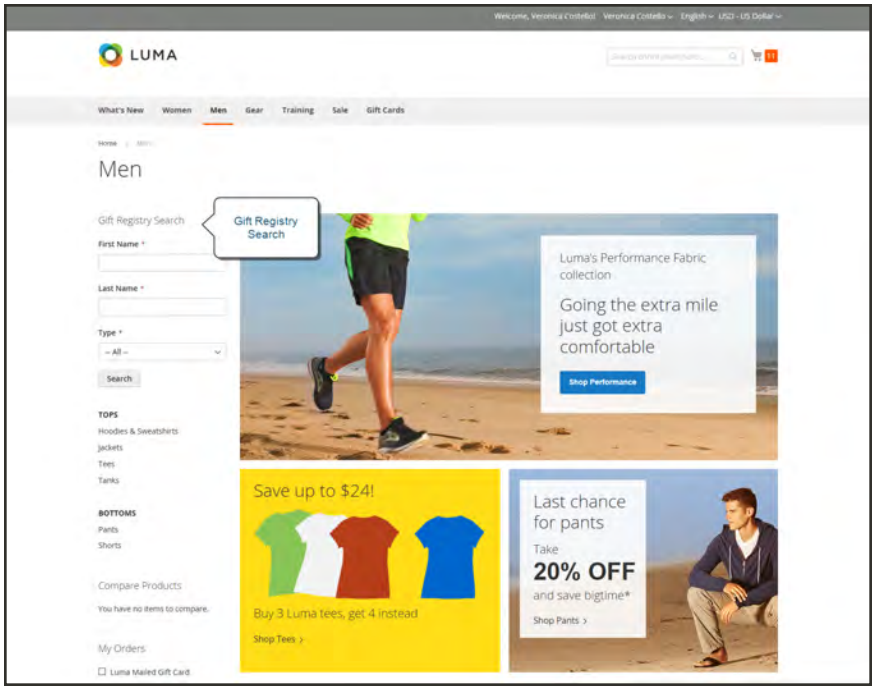
b. Choose the store identify that appears as the **Email Sender** of the message.

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.



Gift Registry Search

To add gift registry search:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
   a. Set **Type** to "Gift Registry Search."
   b. Set **Design Theme** to the theme that is used by the store.
   c. Tap **Continue**.

Gift Registry Search Settings

4. In the Storefront Properties section, do the following:
   a. Enter a **Widget Title** for internal reference.
   b. Set **Assign to Store Views** to the store views where Gift Registry Search is to be available.
   c. Set **Sort Order** to determine the order that the Gift Registry Search block appears if there are other blocks assigned to the same location on the page.

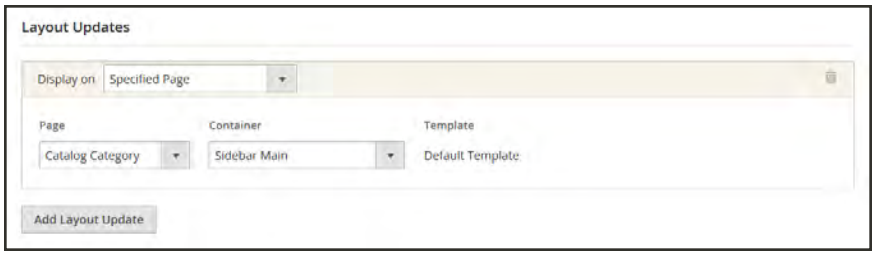
Storefront Properties

5. In the **Layout Updates** section, tap **Add Layout Update**. To determine where the Gift Registry Search appears in the store, do the following:

   a. Set **Display On** to the pages in your store where you want Gift Registry Search block to appear.

   b. If applicable, choose the **Categories** where you want it to appear.

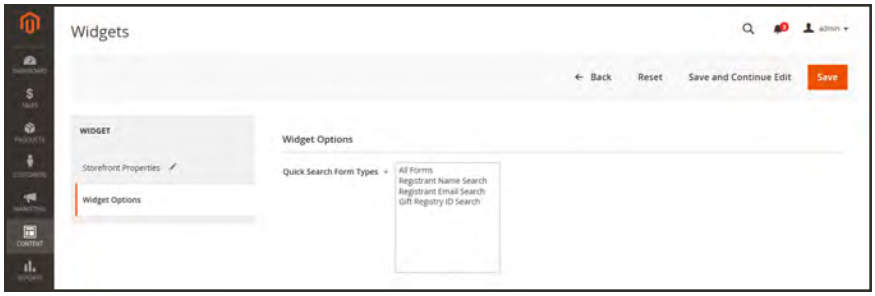
   c. Set **Container** to the location on the page where you the Gift Registry Search block to be placed.



Layout Update

6. In the panel on the left, choose **Widget Options**. To determine how visitors to your site can search for gift registries, select as many of the following that apply:

   - All Forms
   - Registrant Name Search
   - Registrant Email Search
   - Gift Registry ID Search



Widget Options

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

8. When prompted to refresh the page cache, tap the link in the message at the top of the workspace and follow the instructions.

Field Descriptions

FIELD	DESCRIPTION
SETTINGS	
Type	Identifies “Gift Registry Search” as the type of Widget.
Design Theme	The theme that is used by the store where the Gift Registry Search is to appear.
STOREFRONT PROPERTIES	
Widget Title	A name for internal reference.
Assign to Store Views	Identifies the store views where the Gift Registry Search is to be available.
Sort Order	Indicates the order that Gift Registry Search block appears if there are other blocks assigned to appear in the same location.
LAYOUT UPDATES	
Display On	Indicate the specific pages, or types of pages where Gift Registry Search is to appear.
Categories	If applicable, identifies the category pages where Gift Registry Search is to appear.
Container	Indicates the page layout block where Gift Registry Search will be placed. The options vary by template and theme.
WIDGET OPTIONS	
Quick Search Form Types	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

CHAPTER 27:

Rewards & Loyalty

Magento's reward points system gives you the ability to implement unique programs that drive customer engagement and promote customer loyalty. Points can be awarded for a wide range of transaction and customer activities, and the configuration can be set to control the point allotment, balance, and expiration. Customers can redeem points toward purchases, based on the conversion rate that you establish between reward points and currency. A few examples:

Shopping Cart Price Rules

Points can be rewarded to customers on the basis of a shopping cart rule. They can be rewarded as the only action of the price rule, or in conjunction with a discount.

Customer Balance

Reward point balances can be managed by admin users per customer. If enabled in the storefront, customers can also view the details of their points balance.

Redeeming Points

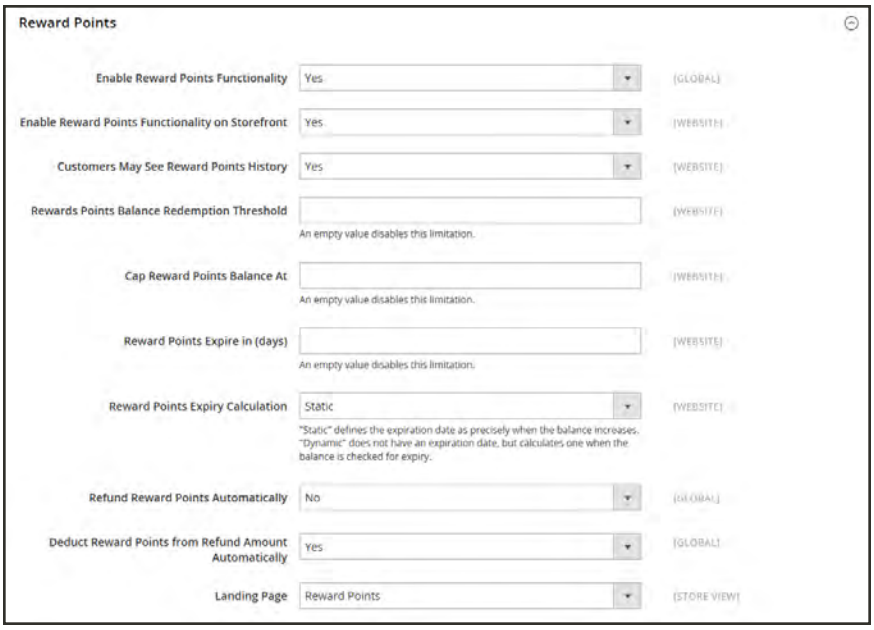
Points can be redeemed by admin users and (if enabled) customers during checkout. In the Payment Method section, a Use my Reward Points checkbox appears above the enabled payment methods. The available points and monetary exchange rate is included. If the available balance is greater than the order grand total, no additional payment methods is required. The amount of reward points applied to the order appears with the order totals, subtracted from the grand total, similar to a store credit or gift cards. If reward points are used in conjunction with store credit or a gift card, the reward points are deducted first, and the store credit or gift card is deducted if the order total is greater than the redeemable amount of reward points.

Refunding to Reward Points

Orders placed with reward points can be refunded to the reward points balance up to the amount redeemed in the order. On the New Credit Memo page, the amount of points to be applied to the customer's balance can be entered. By default, the field contains the full amount of points that were used in the order.

Configuring Reward Points

The Reward Point configuration determines the basic operating parameters, including the lifetime, cap limits, and how reward points are presented in the store.



Reward Points

Process Overview:

Step 1: Configure the Reward Points

Step 2: Configure Points Earned for Customer Activities

Step 3: Complete the Email Notification Settings

Step 1: Configure the Reward Points

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
1. In the panel on the left, under **Customers**, choose **Reward Points**.
2. 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."
3. 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:

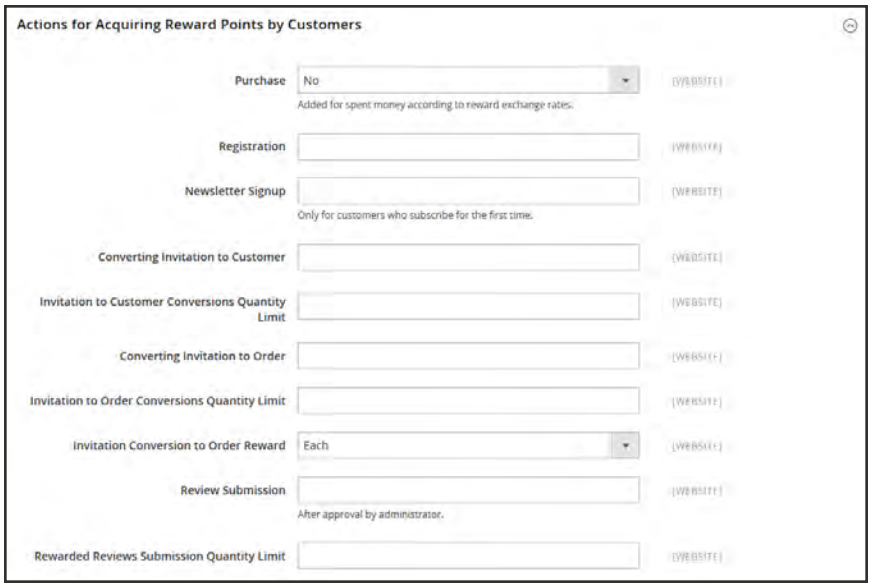
Static	Determines the remaining lifetime of reward points based on the number of days set in the configuration. If the expiration limit in the configuration changes, the expiration date of existing points does not change.
Dynamic	Calculates the number of days left whenever the reward point balance increases. 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."
4. 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.
5. When complete, tap **Save Config**.

Step 2: Configure Points Earned for Customer Activities

This section specifies the number of reward points that can be earned for various customer activities. When points can be earned for completing an action, a message appears to let customers know how many points they can earn.

1. Expand the **Actions for Acquiring Reward Points by Customer** section. Then, do the following:



Actions for Acquiring Reward Points by Customer

   a. In the **Purchase** field, enter the number of points earned for placing an order.

   b. In the **Registration** field, enter the number of points earned for opening a customer account.

   c. In the **Newsletter Signup** field, enter the number of points earned by registered customers who subscribe to a newsletter.

2. In the **Converting Invitation to Customer** field, enter the number of points earned by a customer who sends an invitation, if the recipient then opens a customer account. Then, do the following:

   a. Enter a number in the **Invitation to Customer Conversions Quantity Limit** field to limit the number of invitation conversions that can be used to earn points for the customer who sends the invitation. Leave blank for no limit.

   b. In the **Invitation Conversion to Order Reward** field, enter the number of points earned by a customer who sends an invitation, and the recipient places an initial order.

3. In the **Review Submission** field, enter the number of points earned by a customer who submits a review that is approved for publication. Then, do the following:

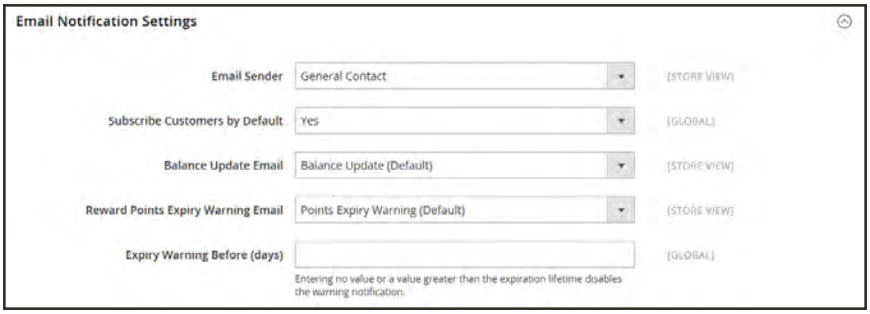
To limit the number of reviews that can be used to earn points per customer, enter the number in the **Rewarded Reviews Submission Quantity Limit** field. Leave blank for no limit.

4. In the **New Tag Submission** field, enter the number of points earned by the customer when a submitted tag is approved for publication.

   To limit the number of tags that can be used to earn points per customer, enter the number in the **Rewarded Tag Submission Quantity Limit** field. Leave blank for no limit.

Step 3: Complete the Email Notification Settings

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



Email Notification Settings

   a. Set **Email Sender** to the store contact that appears as the sender of balance updates and expiration notifications.

   b. If you want to subscribe customers by default to be notified of balance updates and upcoming expiration dates, set **Subscribe Customers by Default** to "Yes."

   c. Set **Balance Update Email** to the template used for the notification that is sent to customers whenever their point balance is updated.

   d. Set **Reward Points Expiry Warning Email** to the template used for the notification that is sent to customers when the expiration limit for a batch of points is reached.

   e. In the **Expiry Warning Before (days)** field, enter the number of days before points expire that notification is sent.

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

Reward Exchange Rates

Reward Exchange Rates determine the number of points that are earned based on the order amount, as well as the value of the points earned. Different exchange rates can be applied to different websites and different customer groups. If multiple exchange rates from different websites and customer groups apply to the same customer, the following rules of priority apply:

Exchange Rate Priority

1. Applies to specific website and specific customer group.
2. Applies to all websites and a specific customer group.
3. Applies to a specific website and all customer groups.
4. Applies to all websites and all customer groups.

When converting currency to points, the amount of points cannot be divided. Any currency remainder is rounded down. For example, if $2.00 converts to 10 points, points will be earned in groups of $2.00. Therefore, a $7.00 order would earn 30 points, and the remaining $1.00 would be rounded down. The monetary amount of the order is defined as the amount which the merchant receives, or the grand total minus shipping, tax, discounts, store credit, and gift cards. The points will be earned the moment when there are no non-invoiced items in the order (all items are either paid or canceled). If an Admin user does not want to allow customers to earn Reward Points for canceled orders, those points can be manually deducted from the Manage Customers page.

To set up exchange rates:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Reward Exchange Rates**.
2. In the upper-right corner, tap **Add New Rate**.

Reward Exchange Rates

3. In the **Reward Exchange Rate Information** section, do the following:

Reward Exchange Rate Information

   a. Set **Website** to the sites where the reward exchange rate applies.
   b. Set **Customer Group** to the groups where the reward exchange rate applies.
   c. Set **Direction** to one of the following:
      - Points to Currency
      - Currency to Points

      For either Direction setting, the amount is represented in the base currency of the website.
4. Enter the **Rate** values according to the Direction setting.

Points to Currency	In the first **Rate** field, enter the number of points. In the second **Rate** field, enter the monetary value of the points.
Currency to Points	In the first **Rate** field, enter the monetary value. In the second **Rate** field, enter the number of points that is represented by the monetary value.

When converting points to currency, the amount of points cannot be divided. For example, if 10 points converts to $2.00, points must be redeemed in groups of ten. Therefore, 25 points would redeem for $4.00, with 5 points remaining in the customer's balance.

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

Field Descriptions

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

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. In the panel on the left, choose **Actions**. Then, enter the amount of points in the **Add Reward Points** field.

Adding Reward Points to Price Rule

3. Follow the standard instructions to complete the cart price rule.

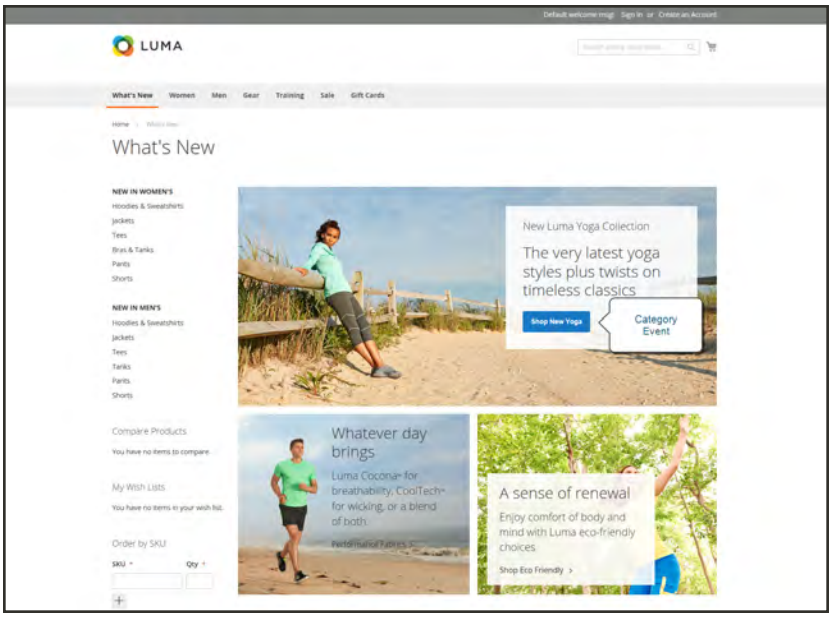
   When the price rule is activated, a message appears in the cart to let customers know how many points they can earn by placing the order.

Notes

CHAPTER 28:

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.



Catalog Event on Home Page

Event Components

Categories

Each event is associated with a category from your catalog.

Events

Event sales are based on a starting and ending date. You can use a countdown ticker to show the time remaining.

Event App

When the Event App is enabled, it appears on the home page and category pages. It lists open and upcoming events, sorted by end date. If two or more events share the same end date, the events are sorted based on the order specified in the configuration.

Customer Groups

Category permissions are based primarily on customer groups.

Category Permissions

Category permissions gives you full control over the specific activities that can take place in a given category.

Website Restrictions

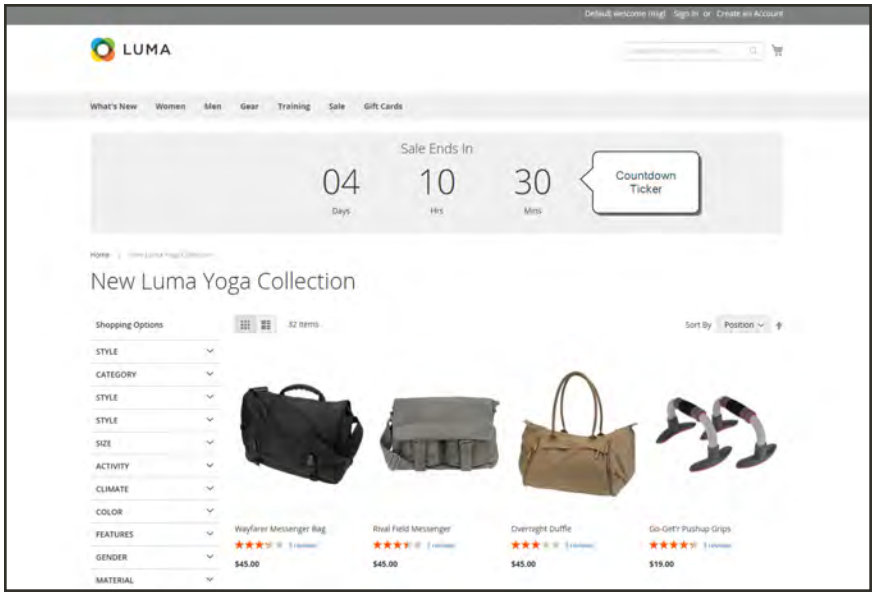
Prevents public access to the site by redirecting to a landing page, login page, or registration page.

Invitations

Email messages are sent with a link to create an account in the store. You can restrict the ability to create an account to only those who receive an invitation.

Event Ticker

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. 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.



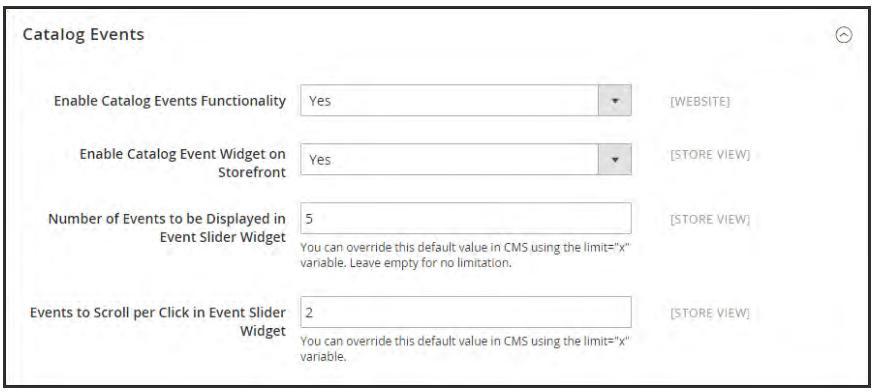
Event Ticker

Configuring Events

Before you can create an event, you must complete the basic configuration to enable events and set up the event block in the sidebar.

To enable and configure events:

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

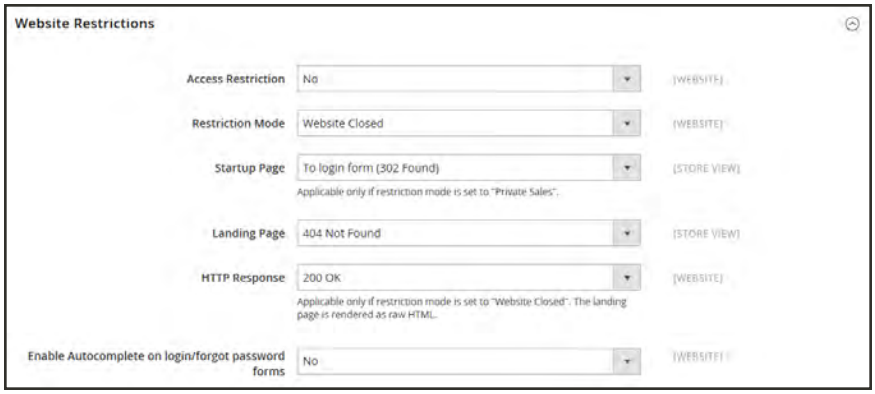


Catalog Events

   a. Set **Enable Catalog Events Functionality** to "Yes."
   b. Set **Enable Catalog Event Widget on Storefront** to "Yes."
   c. Enter the **Number of Events to be Displayed in the Event Slider Sidebar Widget**. By default, this value is set to 5.
   d. Enter the number of **Events to Scroll per Click in Event Slider Sidebar Widget**.
4. When complete, tap **Save Config**.

Restricting Access

Access to a private sale, event, or B2B site can be limited to registered customers who log in, or extended to non-registered customers who must register before gaining access.



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

Creating Events

Each event is associated with a category from your catalog, and only one event can be associated with any given category at a time.

Manage Catalog Events

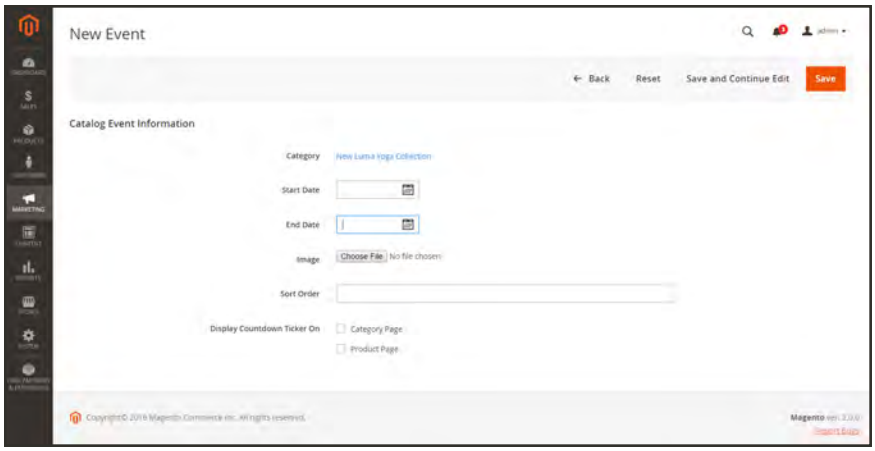
To create an event:

1. On the Admin sidebar, tap **Marketing**. Then under **Private Sales**, choose **Events**.
2. In the upper-right corner,tap **Add Catalog Event**. Then, do the following:
   a. In the category tree, choose the category that you want to associate with the event.

      Because each category can have only one event at a time, any categories that already have an event are disabled .

Category Tree

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



Catalog Event Information

c. Use the calendar to choose the **Start Date** of the event. Then, use the **Hour** and **Minute** sliders to set the time the event begins.

d. Use the calendar to choose the **End Date** of the event. Then, use the **Hour** and **Minute** sliders to set the time the event ends.

e. To upload an **Image** for the event widget, tap **Choose File**. Then, select the image file from your directory.

f. In the **Sort Order** field, enter a number to indicate the sequence in which this event appears when listed with other events.

g. Select the checkbox of each page where you want to display the countdown ticker:

- Category Page
- Product Page.

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

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Category	Global	When creating a new event, this field links back to the category tree. When editing an event, it links to the category page related to the event.
Start Date	Global	The starting date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.
End Date	Global	The ending date and time of the event in MMDDYYYY HH;MM format. Click the calendar button to select the date.
Image	Store View	Uploads an image for the event widget.
Sort Order	Global	Determines the sequence in which this event appears when listed with other events.
Display Countdown Ticker On	Global	Displays the countdown ticker in the header of each page specified. Options include: Category Page / Product Page
Status	Global	Indicates the status of the event based on the Start Date and End Date range. Status is a read-only value. Values include: Open / Closed / Upcoming

Updating Events

Events can be edited from either the Events page or from the category that is associated with the event. When a category has an associated event, an Edit Event button appears in the upper-right corner to takes you to the event information.

Edit Event

Method 1: Edit Event from the Events Page

1. On the Admin sidebar, tap **Marketing**. Then under **Private Sales**, choose **Events**.
2. Find the event in the list, and open it in edit mode.
3. Make the necessary changes to the event.
4. When complete, tap **Save**.

Method 2: Edit Event from Category

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree on the left, select the category that is associated with the event. Then in the upper-right corner, tap **Edit Event**.
3. Make the necessary changes to the event.
4. When complete, tap **Save**.

Invitations

When invitations are enabled, customers can send and view invitations from their account dashboard. The invitation email includes a link to the customer account registration form in your store.

Invitation Workflow

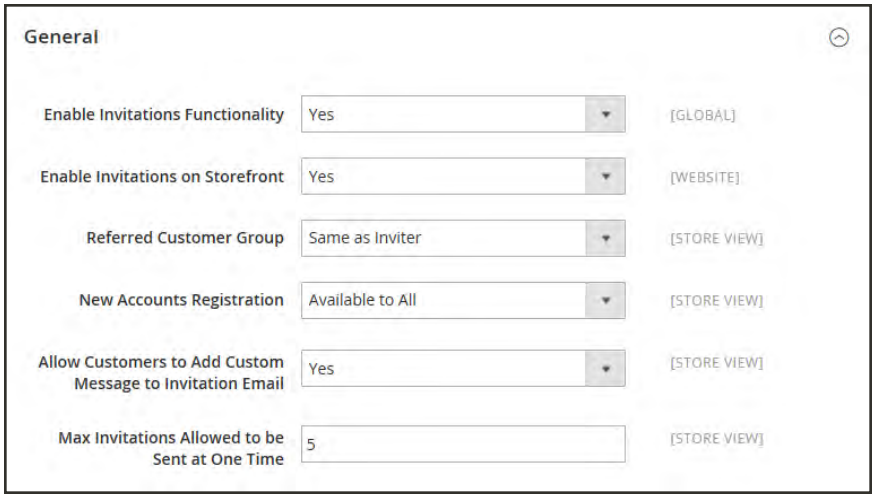
1. **Customer prepares invitations**. From the account dashboard, the customer prepares the list of invitees, and completes the invitation. A custom message can be included, depending on the configuration.
2. **Customer sends invitations.** When ready, the customer taps the Send Invitations button.
3. **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

Invitations must be configured before they can be used for an event. The invitation configuration enables invitations for the store and identifies the referring customer group.

To configure invitations:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose select **Configuration**.
2. In the panel on the left, under **Customers**, choose **Invitations**.
3. Expand the **General** section. Then, do the following:



General

a. Set **Enable Invitations Functionality** to "Yes."

b. To allow customers to manage invitations from the storefront, set **Enable Invitations on Storefront** to "Yes."

c. Set **Referred Customer Group** to one of the following:

- Same as Inviter
- Default Customer Group from Configuration

d. Set **New Accounts Registration** to one of the following:

- By Invitation Only
- Available to All

e. To **Allow Customers to Add Custom Message to Invitation Email**, select "Yes."

f. To limit the number of invitations that can be sent at one time, enter the number in the **Max Invitations Allowed to be Sent at One Time** field.

4. Expand the **Email** section, and do the following:

Email

a. Select the store identity to be used as the **Customer Invitation Email Sender**.

b. Select the **Customer Invitation Email Template** used for invitations sent.

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

Communications

One of the tasks to complete before launching your store is to review the email templates for messages sent from your store to make sure they reflect your brand. 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 customize content by adding variables and markup tags.

Contents

CHAPTER 29:

Email Templates

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 smartphones. 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 Enterprise Edition 2.0.

Desktop Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
OS X 10.8	Apple Mail 6
OS X 10.7	Outlook 2011 Outlook 2013
Windows 8	Outlook 2010
Windows 7	Outlook 2007 Outlook 2003

Mobile Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
Android 4.2, “Jelly Bean”	Native email app
Android 2.3, “Gingerbread”	Native email app
Gmail App (Android 4.2)	Native email app
Blackberry 5 OS	Native email app
IOS 8	iPhone 6 iPhone 6 Plus
IOS 7	iPad (Retina) iPad Mini iPhone 5s
	Mail on these devices:
IOS 6	iPhone 5 iPhone 4s

Web Clients

EMAIL APPLICATION	BROWSERS SUPPORTED*
AOL Mail	Chrome Internet Explorer Firefox
Gmail	Chrome Internet Explorer Firefox
Yahoo! Mail	Chrome Internet Explorer Firefox
Outlook.com	Chrome Internet Explorer

* The latest version of each browser was used for testing.

Preparing Your Email Logo

Logos can be saved as any of the following file types. Logos with transparent backgrounds can be saved as either .GIF or .PNG files.

- JPG (jpeg)
- GIF
- PNG

To ensure that your logo renders well on high-resolution devices, the uploaded image should be three times the size of the dimensions that are specified in the header template. Typically, original logo artwork is created as a vector image, so it can be scaled up without losing resolution. The image can then be saved in one of the supported bitmap image formats.

Logo with Transparent Background

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**[1] of the logo, so the height and width resize proportionally.

As a general rule, you can make an image smaller than the original, but not larger without losing resolution. Taking a small image and scaling it up in a photo editor lowers the resolution of the image. For example, if the display dimensions of the logo are 168 pixels wide by 48 pixels high in the header template, the uploaded image should be 504 pixels wide by 144 pixels high.

LOGO DIMENSIONS	1 X (DISPLAY SIZE)	3 X (IMAGE SIZE)
Width:	168 px	504 px
Height:	48 px	144 px

[1]The proportional relationship between the width and height of an image.

Configuring Email Templates

The configuration determines the logo, as well as the header and footer templates that are used for all email messages sent from your store.

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 **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand the **Emails** section. Then, do the following:
   a. To upload your prepared **Logo Image**, tap **Browse**. Find the file on your computer, and click to 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**.

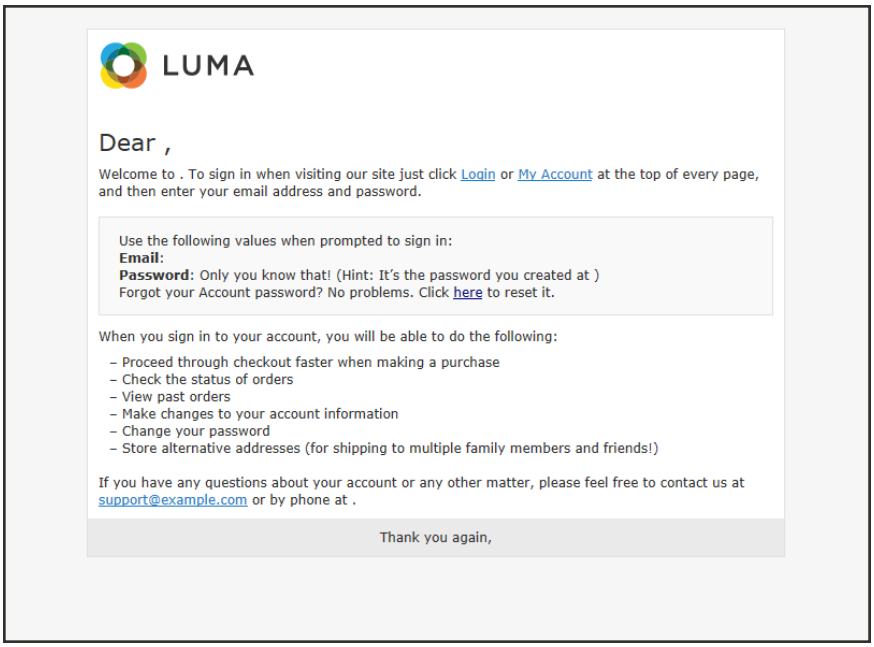
Field Descriptions

FIELD	SCOPE	DESCRIPTION
Logo Image	Store View	Identifies the logo file that appears in the header of transactional email messages. To support high-resolution displays, it is recommended that you upload an image that is three times the display dimensions. For example, if the actual display dimensions of the logo are 100 pixels high and 200 pixels wide, you should upload an image that is 300 pixels high and 600 pixels wide. To delete the current image and upload another, select the Delete Image checkbox. Then, browse to select the new image. Allowed file types: JPG, GIF, and PNG
Logo Image Alt	Store View	Enter alternative text that appears if the logo image is not available.
Logo Width	Store View	Enter the display width of the image in pixels, as a number. Do not include the “px” abbreviation. It is important to specify both width and height to preserve the aspect ratio when the image is rendered at different sizes.
Logo Height	Store View	Enter the display height of the image in pixels, as a number. Do not include the “px” abbreviation. It is important to specify both width and height to preserve the aspect ratio when the image is rendered at different sizes.
Header Template	Store View	Select the template to be used for the header of all transactional email messages.
Footer Template	Store View	Select the template to be used for the footer of all transactional email messages.

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 widgets 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.

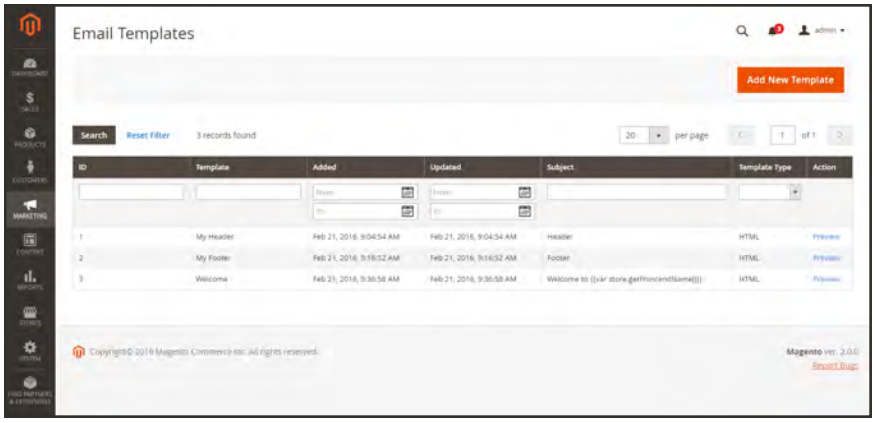
The default templates include your logo and store information, and can be used without further customization. However as a best practice, you should view each template, and make any necessary changes before they are sent to customers.



Preview of Welcome Template

Email Header

The email header template includes your logo that is linked to your store. In addition, you can easily insert variables to add store contact information to the header.



Email Templates

Process Overview:

Step 1: Load the Template

Step 2: Customize the Template

Step 3: Preview the Template

Step 4: 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. In the **Template** list under Magento_Email, choose "Header."
   b. Tap **Load Template**.

Load Default Header Template

Step 2: Complete the Template Information

1. In the **Template Name** field, enter a name for your custom header.
2. Enter a **Template Subject** to help organize the templates. The list of templates can be sorted and filtered by the Subject column.

Header Template Information

Step 3: Customize the Template Content

1. 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.

Template Content

2. 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

The Store Contact variables are the ones most often included in the header, However, you are not limited to the variables in this list. You can enter the code for any system variable or custom variable directly into the template.

3. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
4. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
5. When complete, tap **Save Template**.

   Your custom header now appears in the list of available Email templates.

Step 4: Update the Configuration

1. In the list, tap the new header to reopen the template in edit mode.
2. Tap the last link in the breadcrumb trail at the top of the Template Information section. Then, expand the **Emails** section.
3. Set **Header Template** to the name of the new header template.

Header Template Configuration

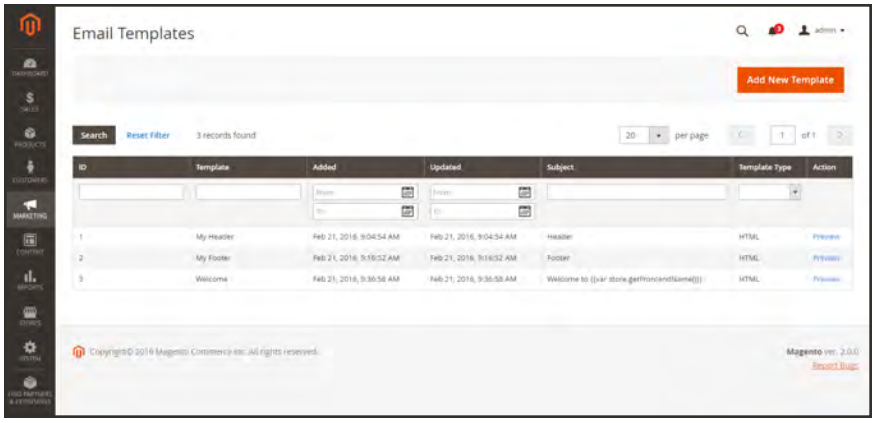
4. When complete, tap **Save Config**.

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
Insert Variable	Inserts a Store Contact Information variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template header can be entered in the Template Styles box.

Footer Template

The email template footer contains the closing and signature line of the email message. You can change the closing to fit your style, and add additional information, such as the company name and address below your name.



Email Templates

Process Overview:

Step 1: Load the Template

Step 2: Customize the Template

Step 3: Preview the Template

Step 4: 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. In the **Template** list under Magento_Email, choose " Footer."
   b. Tap **Load Template**.

Load Default Footer Template

Step 2: Complete the Template Information

1. In the **Template Name** field, enter a name for your custom footer.
2. Enter a **Template Subject** to help organize the templates. The list of templates can be sorted and filtered by the Subject column.

Footer Template Information

Step 3: Customize the Template Content

1. 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.

Template Footer Content

2. 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

The Store Contact variables are the ones most often included in the footer, However, you are not limited to the variables in this list. You can enter the code for any system variable or custom variable directly into the template.

3. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
4. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
5. When complete, tap **Save Template**.

   Your custom footer now appears in the list of available Email templates.

Step 4: Update the Configuration

1. In the list, tap the new footer to reopen the template in edit mode.
2. Tap the last link in the breadcrumb trail at the top of the Template Information section. Then, expand the **Emails** section.
3. Set **Footer Template** to the name of the new template.

Footer Template Configuration

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

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
Insert Variable	Inserts a Store Contact Information variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template footer can be entered in the Template Styles box.

Email 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 a different template is used for each activity or event. You can use the templates as they are, or customize them to match your voice and brand. You might start with the most important messages, such as those related to customer accounts and activities. The selection of variables varies by template. In addition to the standard Store Contact Information, some templates have additional variables available. For a complete list, see the Email Template List at the end of this section.

Process Overview:

Step 1: Load the Template

Step 2: Customize the Template

Step 3: Preview the Template

Step 4: 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. In the **Template** list, choose the message template that you want to customize.
   b. Tap **Load Template**.

Default Message Template

Step 2: Complete the Template Information

1. In the **Template Name** field, enter a name for your custom footer.
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. Because the Template Subject can be used to sort the list, try to choose a word or phrase can applies to multiple messages. For ideas, see the Email Template List at the end of this section.

Message Template Information

Step 3: Customize the Template Content

1. 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.

Template Message Content

2. 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. 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 variable or custom variable directly into the template.

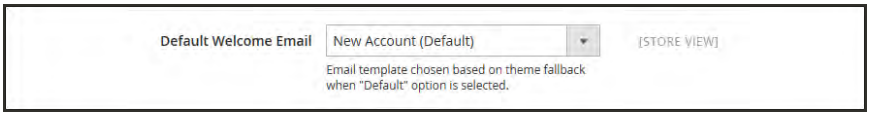
Insert Variable

3. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
4. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
5. When complete, tap **Save Template**.

   Your custom footer now appears in the list of available Email templates.

Step 4: Update the Configuration

1. In the list, tap the new message template to reopen it in edit mode.
1. In the breadcrumb trail at the top of the Template Information section, take note of the name of the section that immediately follows the last link. Then, tap the link to open the configuration page.
2. Expand the section. For this example, the template is located in the **Create New Account Options** section.
3. Find the email template field in the form, and choose the new template that you created.



Welcome Email Configuration

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

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
Insert Variable	Inserts a variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template can be entered in the Template Styles box.

Email Template List

Email Templates

Customer Account

- New Account
- New Account Confirmation Key
- New Account Confirmed
- New Account Without Password
- Forgot Password
- Remind Password
- Reset Password

Customer Activity

- Contact Form
- Send Product Link to Friend
- Wishlist Sharing

Gift Cards

- Gift Card(s) Purchase
- Gift Card Code/Balance

Gift Registry

- New Registry
- Registry Sharing
- Registry Update

Invitations

- Customer Invitation

Rewards

- Balance Update
- Points Expiry Warning

Newsletters

- Subscription Confirmation
- Subscription Success
- Unsubscription Success

Product Alert

- Cron Error Warning

Product Alerts

- Product Alerts Cron Error
- Product Price Alert
- Product Stock Alert

Order

- New Order
- New Order for Guest
- Order Update
- Order Update for Guest
- Payment Failed

Invoice

- New Invoice
- New Invoice for Guest
- Invoice Update
- Invoice Update for Guest

Shipment

- New Shipment
- New Shipment for Guest
- Shipment Update
- Shipment Update for Guest

Credit Memo

- **Credit Memo Update**
- **Credit Memo Update for Guest**
- New Credit Memo
- New Credit Memo for Guest

RMA

Email Templates (cont.)

- Price Alert
- Stock Alert

Promotions

- Promotion Notification/Reminder

Admin Activity

- Forgot Admin Password
- Reset Password

Email Templates

- Email - Footer
- Email - Header

Import/Export

- Export Failed
- File HIstory Clean Failed
- Import Failed
- New RMA
- New RMA for Guest
- RMA Admin Comments
- RMA Admin Comments for Guest
- RMA Authorization
- RMA Authorization for Guest
- RMA Customer Comments

System Notifications

- Sitemap Generate Warnings
- Currency Update Warnings

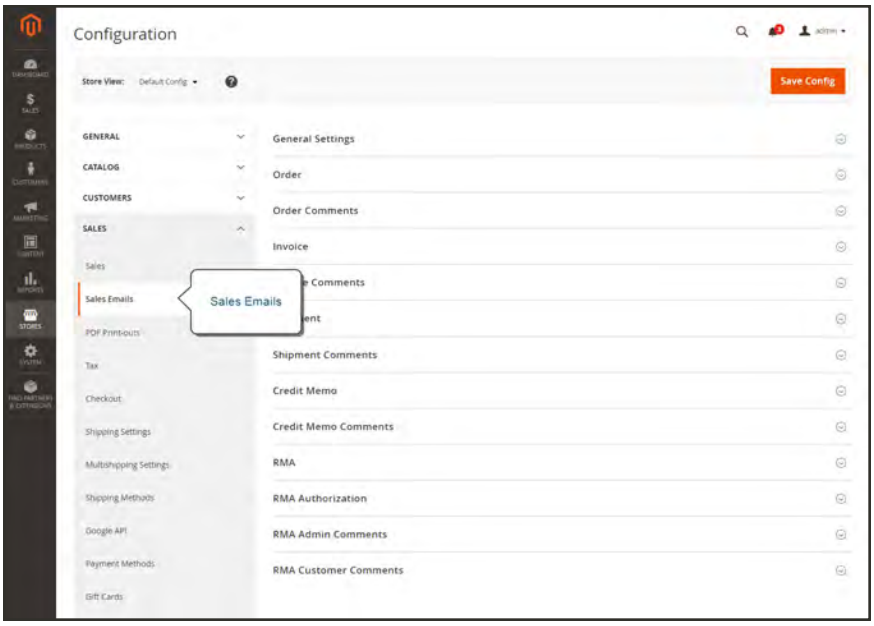
CHAPTER 30:

Sales Communications

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.

Configuring Sales Emails

A number of email messages are triggered by the events related to an order, and the configuration for each of them 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.



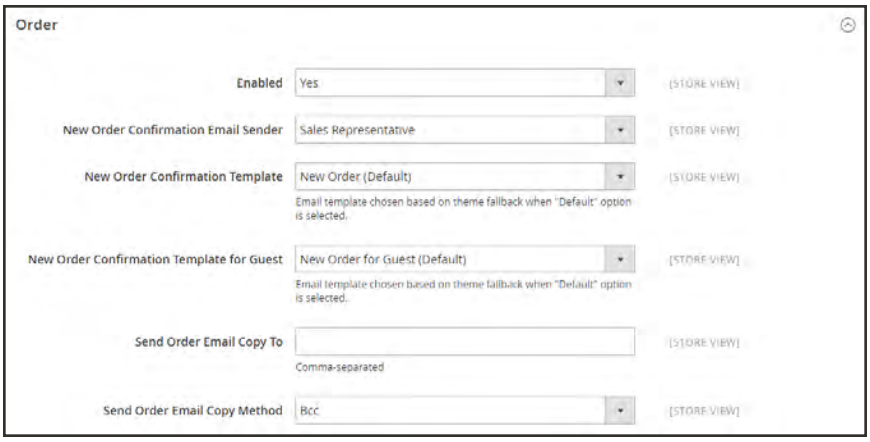
Sales Emails

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 Sales Emails

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



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.

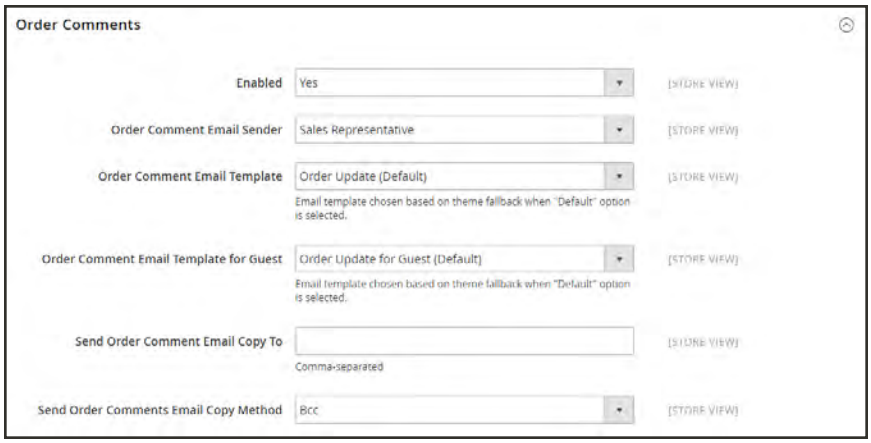
d. Set **New Order Confirmation Template for Guest** to the template that is used for the email that is sent to guests who do not have an account with your store.

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.

4. Expand the **Order Comments** section, and repeat these steps.



Order Comments

5. Complete the configuration for the remaining sales emails:
   - Invoice
   - Shipment
   - Credit Memo
   - RMA
6. When complete, tap **Save Config**.

PDF Logo Requirements

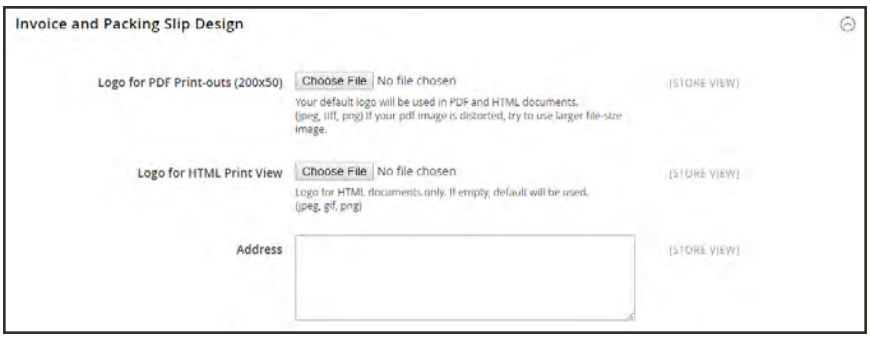
Unlike the logo images used in HTML, the logo for PDF nvoices and other sales documents can be a high-resolution, 300 dpi. The image must be rendered to fit a space 200 pixels wide by 50 pixels high. Be careful to preserver the aspect ratio when resizing the logo. Resize the logo to fit the height, and don't worry about any unused space on the right.

PDF Logo for Luma Theme

One way to resize your logo to fit the required size is to create a new, blank image with the correct dimensions. Then, paste your logo image and resize it to fit the height. With most image editing programs, you can either scale it by a percentage to preserve the aspect ratio, or hold down the shift key and manually resize the image.

To configure invoices and packing slips:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand the **Invoice and Packing Slip Design** section. Then, do the following:



Invoice and Packing Slip Design

   a. To upload the **Logo for PDF Print-outs**, tap **Choose File**. Find the logo that you have prepared, and tap **Open**.
   b. To upload the **Logo for HTML Print View**,tap **Choose File**. Find the logo that you have prepared, and tap **Open**.
4. Enter your address as you want it to appear on invoices and packing slips.
5. When complete, tap **Save Config**.

For reference, a thumbnail of the uploaded image appears before each field. Don't worry if the thumbnail appears distorted. The proportion of the logo will be correct on the invoice.

To replace an image:

1. Tap **Choose File** and choose a different logo file.
2. Mark the **Delete Image** checkbox for the image you want to replace.
3. Tap **Save Config**.

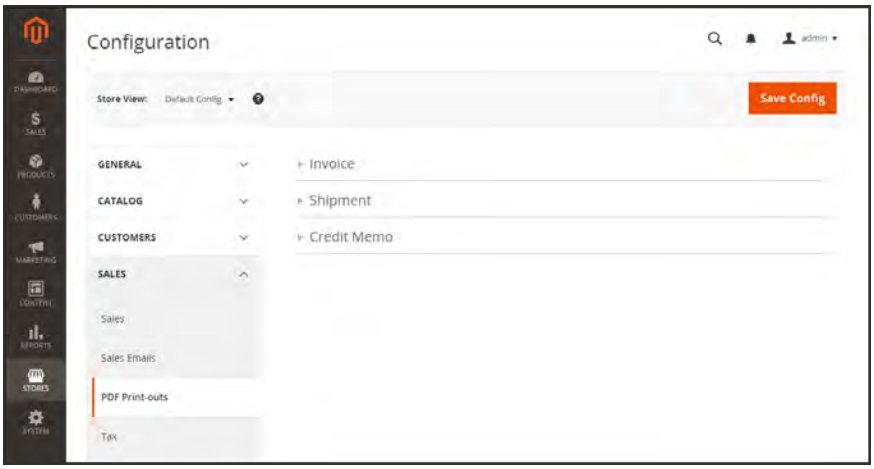
PDF Invoice with Logo

Image Formats

FORMAT	REQUIREMENTS
PDF	
File Format	JPG (jpeg), PNG, or TIF (tif)
Image Size	200 pixels wide x 50 pixels high
Resolution	300 dpi recommended
HTML	
File Format	JPG (jpeg), GIF, or PNG
Image Size	Determined by theme.
Resolution	72 or 96 dpi

Adding Reference IDs to Header

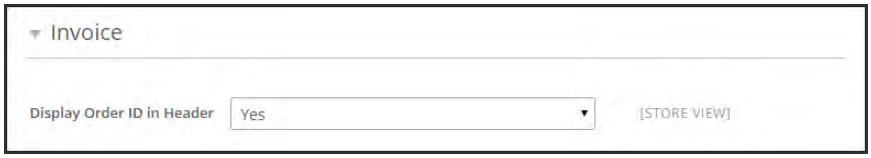
The order ID and customer IP address can be included in the header of sales documents that accompany an order. Follow the instructions below to include either, or both of these identifiers for reference in the header of invoices, shipment packing slips, and credit memos.



PDF Print-outs

To show the Order ID:

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.

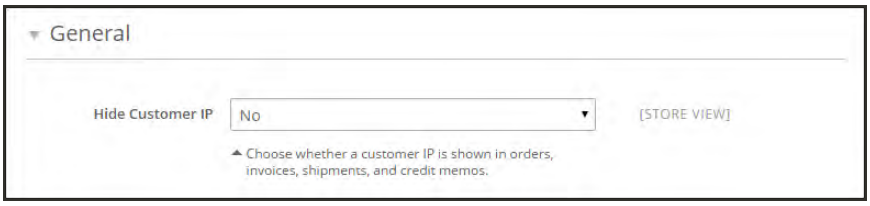


Invoice

4. Set **Display Order ID in Header**to "Yes."
5. Repeat these steps for the **Shipment** and **Credit Memo** sections.
6. When complete, tap **Save Config**.

To show the customer IP address:

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.



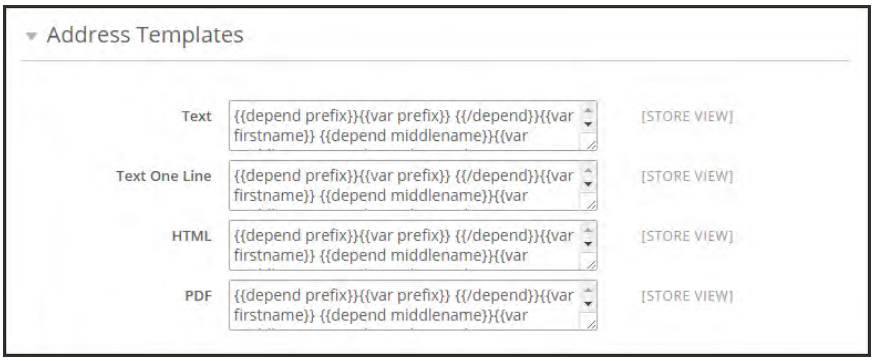
General

4. Set **Hide Customer IP** to "No."
5. When complete,tap **Save Config**.

Customer Address Templates

Address templates can be used to change the format of the customer billing and shipping addresses that appear in the following locations:

- General customer billing and shipping address information
- Shipping and billing addresses in customer's address book (available during checkout)
- Address format for PDF sales documents, such as invoices, shipments, and refunds



Address Templates

To change the order of address fields:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
1. In the panel on the left under **Customers**, choose**Customer Configuration**.
2. 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
3. Edit each template as needed, using the examples below for reference.
4. When complete, tap **Save Config**.

Customer AddressTemplate (Text, HTML, and PDF)

```
{{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}} {{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}{{depend suffix}} {{var suffix}}{{/depend}}

{{depend company}}{{var company}}{{/depend}}

{{if street1}}{{var street1}}

{{/if}}

{{depend street2}}{{var street2}}{{/depend}}

{{depend street3}}{{var street3}}{{/depend}}

{{depend street4}}{{var street4}}{{/depend}}

{{if city}}{{var city}}, {{/if}}{{if region}}{{var region}}, {{/if}}{{if postcode}}{{var postcode}}{{/if}}

{{var country}}

T: {{var telephone}}

{{depend fax}}F: {{var fax}}{{/depend}}

{{depend vat_id}}VAT: {{var vat_id}}{{/depend}}
```

Customer Address Template (Text One Line)

```
{{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}}
```

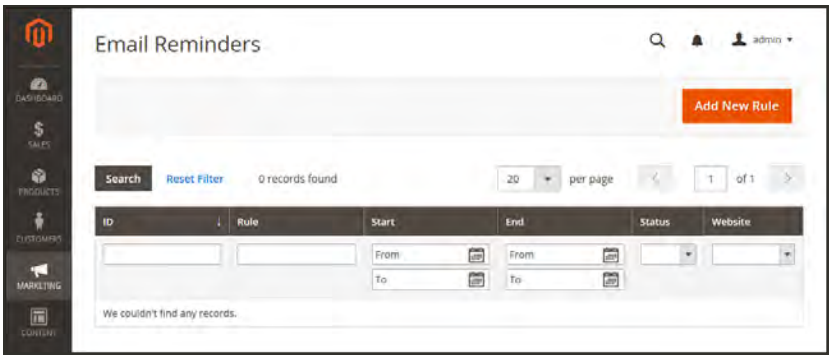
Notes

CHAPTER 31:

Email Reminders

The purpose of an email reminder is encourage people who have visited your store to take advantage of a promotion and make a purchase. Email reminders can be automatically sent to customers when a specific set of conditions is met. For example, you might send a reminder to customers who have added something to their cart or wishlist, but have not yet made a purchase. You can use email reminders to encourage customers to return to your store, and include a coupon code as an incentive. Coupon codes can be automatically generated for each batch of email reminders, to give you control over the offers that are associated with each batch.

Email reminders can be triggered after a certain number of days have passed since a cart was abandoned, or for any other condition you want to define, such as total cart value, quantity, items in cart, and so on.



Email Reminders

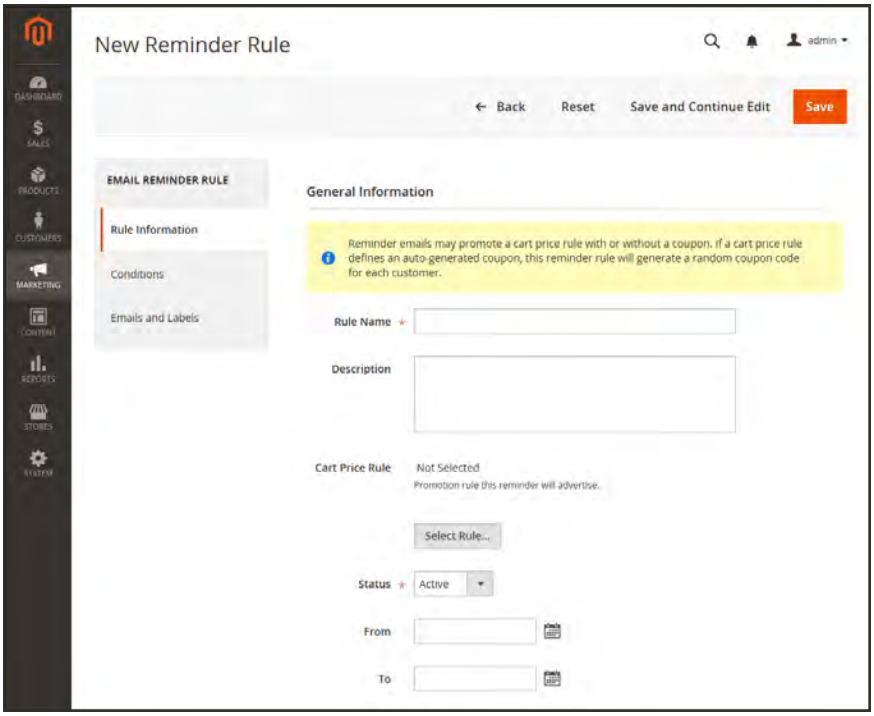
Creating Email Reminders

Before setting up an email reminder rule, you must first set up a cart price rule to define the promotion that is being offered. Rule conditions that trigger an email reminder can be based on cart properties, wishlist properties, or both.

> Email reminders might promote a cart price rule with, or without, a coupon. A cart price rule that defines an auto-generated coupon generates a random coupon code for each customer.

To create an email reminder:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Reminder Rules**.
2. In the upper-right corner, tap **Add New Rule**.
3. Complete the General Information, as follows:

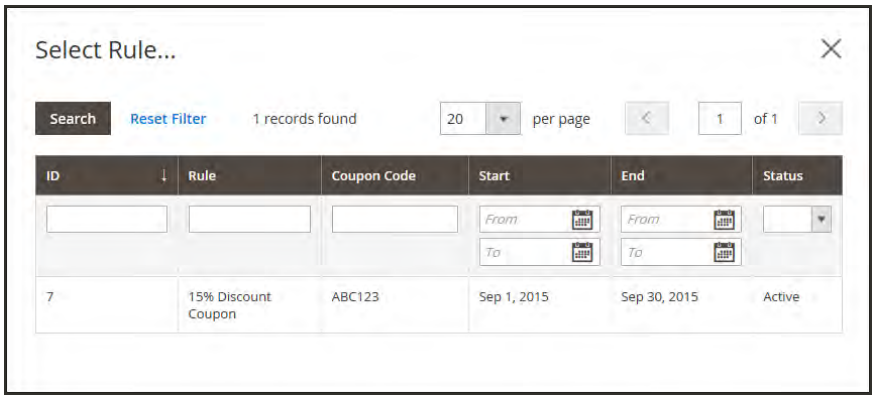


General Information

a. Enter a **Rule Name** to identify the rule internally.

b. Enter a brief **Description** of the rule.

c. To choose the **Cart Price Rule** promotion that this reminder is to advertise, tap **Select Rule...**. Then, select the rule.



Select Cart Rule

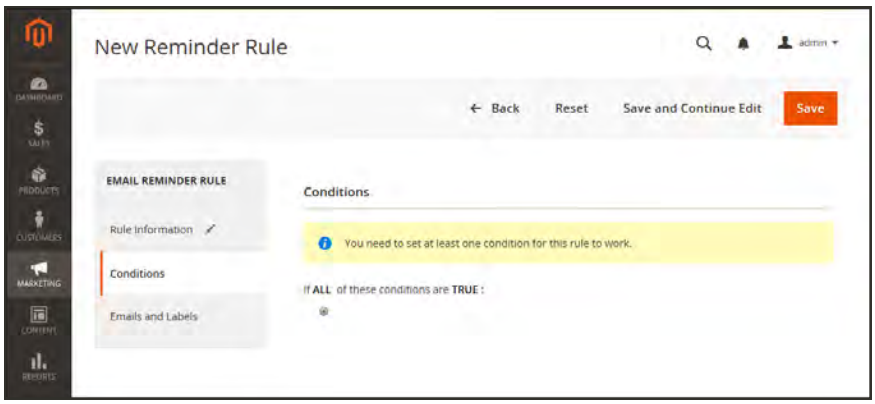
d. If you want the rule to go into effect immediately, set **Status** to "Active."

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, select **Conditions**. At least one condition must be defined for the rule. The process is similar to building a catalog price rule.

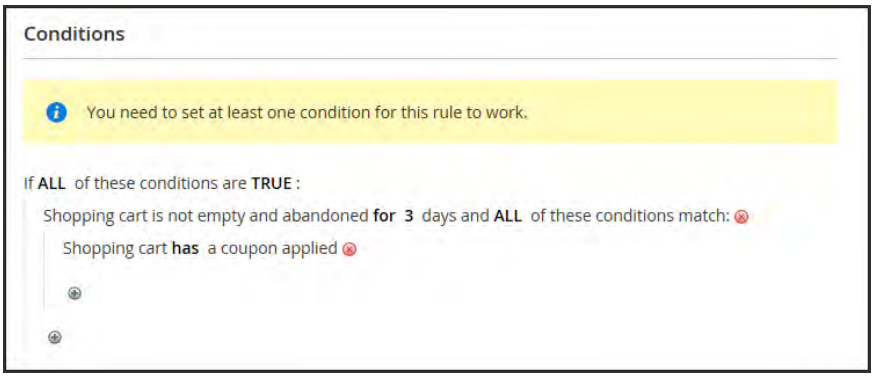


Conditions

a. Tap **Add** to display the list of options. Then, choose one of the following conditions:

- Wishlist
- Shopping Cart

b. Complete the condition to describe the scenario that triggers the email reminder.

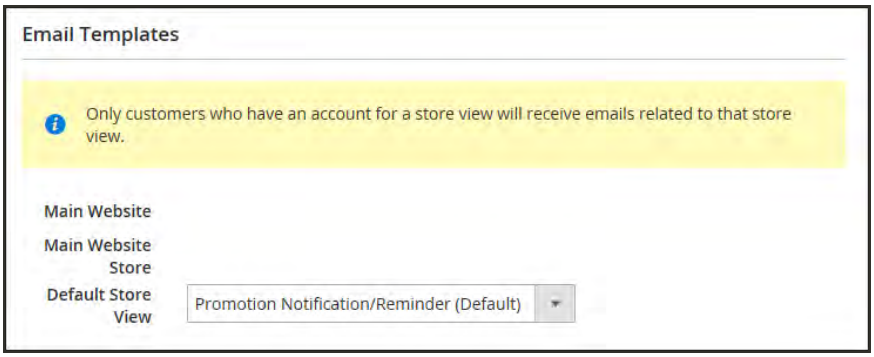


Completed Condition

5. In the panel on the left, choose **Emails and Labels**

6. In the Email Templates section, choose the email template to be used for the **Default Store View**. If it is to be sent to multiple store views, choose the correct template for each.

   If you don't want to send the reminder email to customers of a store view, leave the value "Not Selected."



Email Templates

7. In the Default Titles and Description section, do the following:

   a. Enter the **Rule Title for All Store Views**.

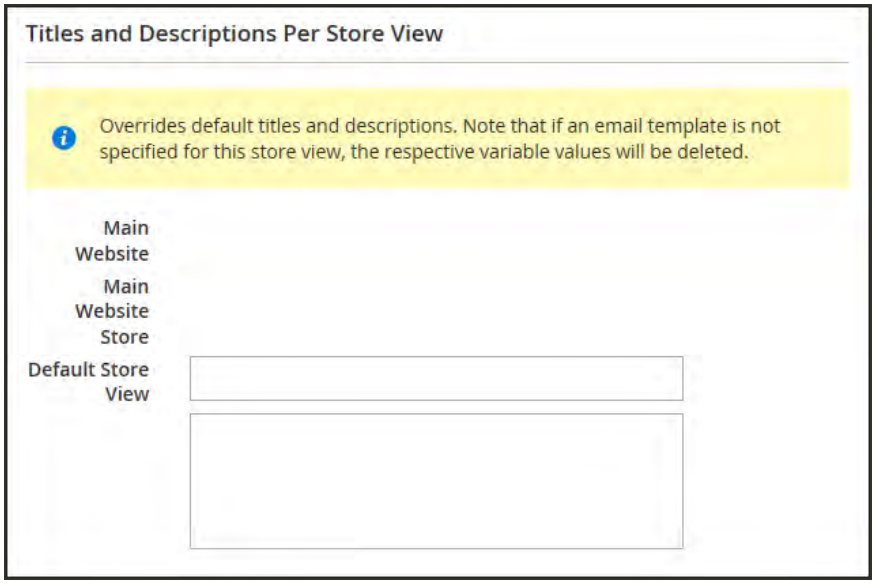
   > This value can be incorporated into email templates by using the `promotion_name` variable.

   b. Enter the **Rule Description for All Store Views**.

Default Titles and Description

c. In the Titles and Descriptions Per Store View section, enter the Rule Title and Description for the **Default Store View**. For multiple store views, enter the appropriate title and description for each.

> The description can be incorporated into email templates by using the promotion_description variable.



Titles and Description per Store View

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

Trigger Conditions

SOURCE	TRIGGER
Wishlist	Number of days abandoned Sharing Number of items Specific items
Shopping Cart	Number of days abandoned Specific coupon code applied Line items quantity Items quantity Total Virtual items Specific Items

Field Descriptions

FIELD	DESCRIPTION
RULE INFORMATION	
Rule Name	The name of the automated reminder rule identifies the rule internally.
Description	A description of the rule for internal reference.
Shopping Cart Price Rule	The shopping cart rule that is associated with this email reminder. Reminder emails can promote a shopping cart price rule with or without coupon. If a shopping cart price rule includes an auto-generated coupon, the reminder rule will generate a random, unique coupon code for each customer.
Assigned to Website	The websites to receive automated reminder emails based on this rule.
Status	Activates the rule. If status is inactive, then all other settings are ignored, and the rule is not triggered. Options include: Active / Inactive
From Date	The starting date for this automated reminder rule. If no date is specified, the rule becomes active immediately.

Field Descriptions (cont.)

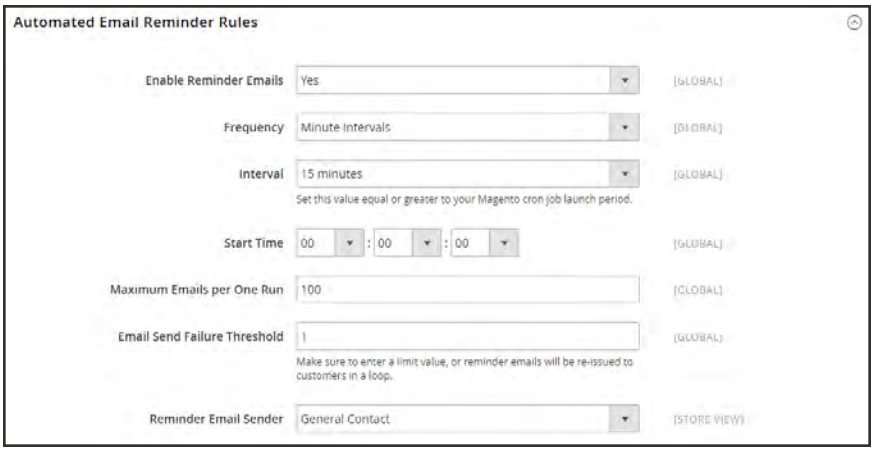
FIELD	DESCRIPTION
To Date	The ending date for this automated reminder rule. If no date is specified, the rule becomes active indefinitely.
Repeat Schedule	The number of days before the rule is triggered, and the reminder email sent again, provided the conditions are met. To trigger the rule more than 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.
EMAIL AND LABELS	
Email Templates	Determines the email template to be used for each store view.
Rule Title for All Store Views	Determines the title of the rule for each store view.
Rule Description for All Store Views	Determines the description of the rule for each store view.

Configuring Email Reminders

Email reminder rules can be configured to be sent at regular intervals by the minute, hour, or day. The configuration determines how many emails are sent in a batch, and the store identity that appears as the sender of the message.

To configure email reminders:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under Customers, choose**Promotions**.
3. Expand the **Automated Email Reminder Rules** section. Then, do the following:



Automated Email Reminder Rules

   a. Set **Enable Reminder Emails** to "Yes."
   b. To set how often Magento checks for new customers who qualify automated email reminders, set **Frequency** to one of the following:
      - Minute Intervals
      - Hourly
      - Daily
   c. Set the appropriate **Interval**, based on the Frequency setting.
   d. Set **Start Time** to the hour, minute, and second the email is sent, based on a 24-hour clock.
   e. To limit the number of emails that can be sent in a batch, enter the number in the **Maximum Emails per One Run** field.
   f. To avoid repeated attempts to send failed email, enter the maximum number of attempts in the **Email Send Failure Threshold** field.

g. Set **Reminder Email Sender** to the store identity that appears as the sender of the reminder email.

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

Email Reminder Templates

The default email reminder template can be customized, and additional templates created for different promotions. Email reminders have a selection of specific variables that can be incorporated into the message. The information in these variables is determined by the email reminder rule that you set up, and by the cart price rule that is associated with the coupon. The Insert Variable button can be used to insert the markup tag with the variable into the template. To learn more, see: Email Templates.

Preview of Promotion Reminder

To customize an email reminder template:

1. On the Admin sidebar, tap **Marketing.** Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
   a. In the **Template** list under Magento_Reminder, choose the **Promotion Notification/Reminder** template.
   b. Tap **Load Template**.
3. Follow the standard instructions to customize the template.

Email Reminder Variables

VARIABLE	MARKUP TAG
Coupon Code	`{{var coupon.getCode()|escape}}`
Coupon Usage Limit	`{{var coupon.getUsageLimit()|escape}}`
Coupon Usage Per Customer	`{{var coupon.getUsagePerCustomer()|escape}}`
Customer Account URL	`{{store url="customer/account/"}}`
Customer Name	`{{var customer.getName()|escape}}`
Email Footer Template	`{{template config_path="design/email/footer_template"}}`
Email Header Template	`{{template config_path="design/email/header_template"}}`
Email Logo Image Alt	`{{var logo_alt}}`
Email Logo Image URL	`{{var logo_url}}`
Promotion Description	`{{var promotion_description|escape|nl2br}}`
Promotion Name	`{{var promotion_name|escape}}`
Store Name	`{{var store.getFrontendName()}}`
Store URL	`{{store url=""}}`

CHAPTER 32:

Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Enterprise Edition 2.0 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.

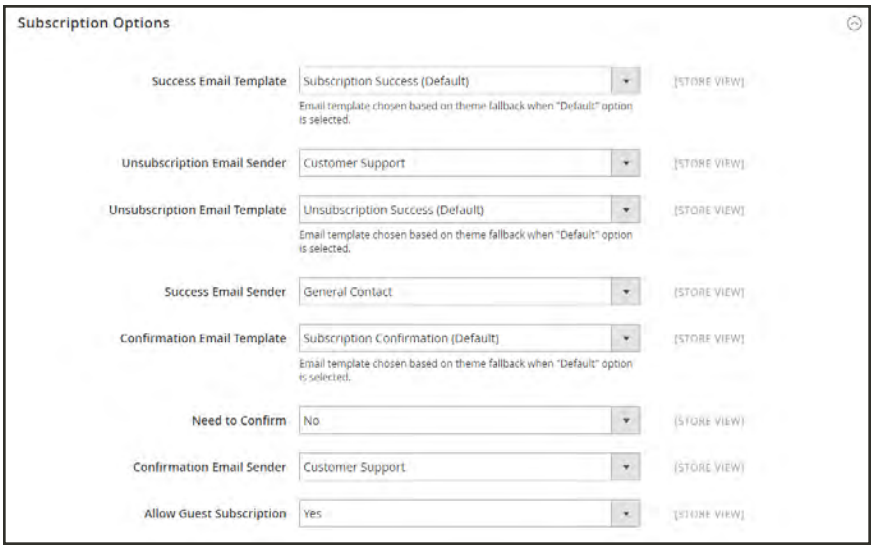
You can add capabilities by integrating your Magento installation with a third-party newsletter service provider and by adding extensions. To learn more, see Magento Connect.

Configuring Newsletters

Newsletters can be set up to require .that customers 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. Expand the **Subscription Options** section. Then, do the following:



Subscription Options

a. Confirm the email template and sender of each message sent to subscribers:
   - Success email
   - Confirmation email
   - Unsubscription email

b. To require double-opt in 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 Subscriptions** to "Yes."

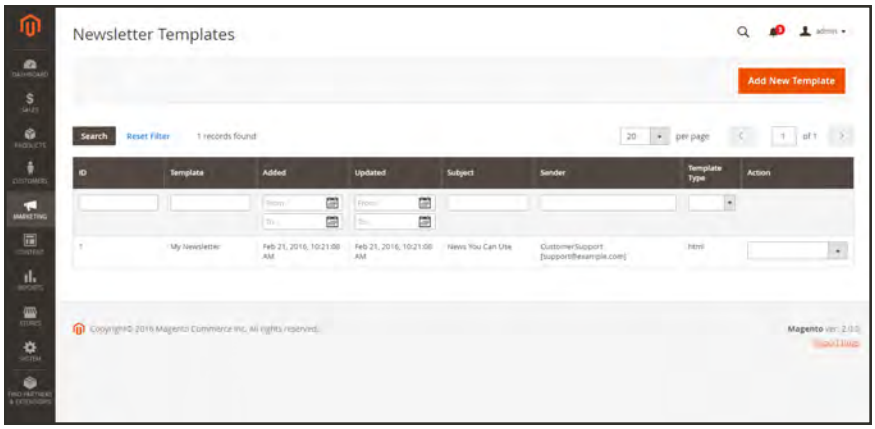
d. When complete, tap **Save Config**.

---

[1]The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

Newsletter Templates

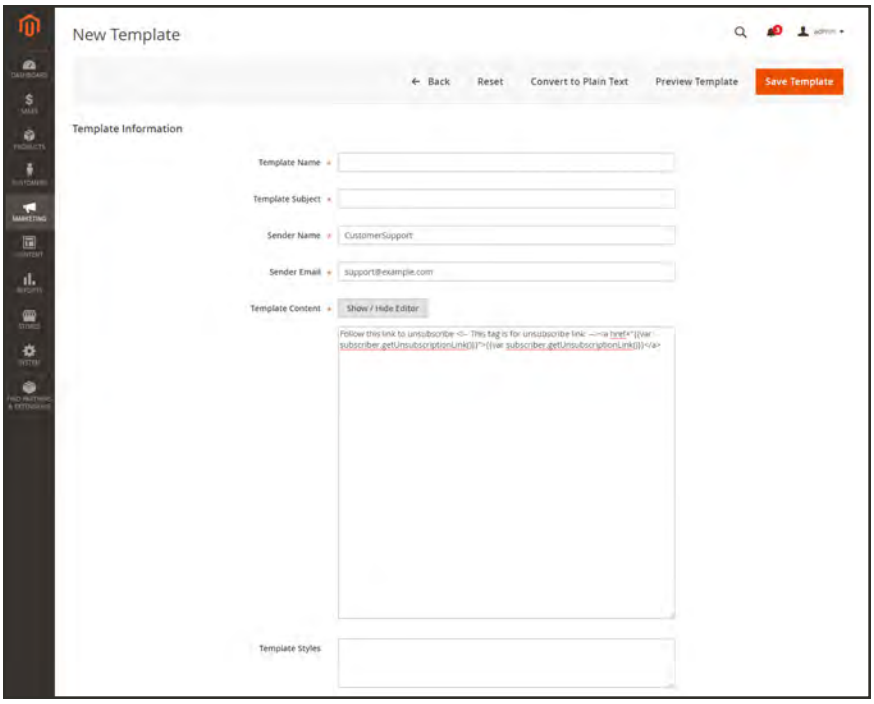
You can create as many newsletter templates as you need for different purposes. You might send a weekly product update, a monthly newsletter, or annual holiday newsletter.



Newsletter Templates

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 editor. Then, update the content as needed.



Template Information

> 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 any CSS declarations that are needed to format the content.

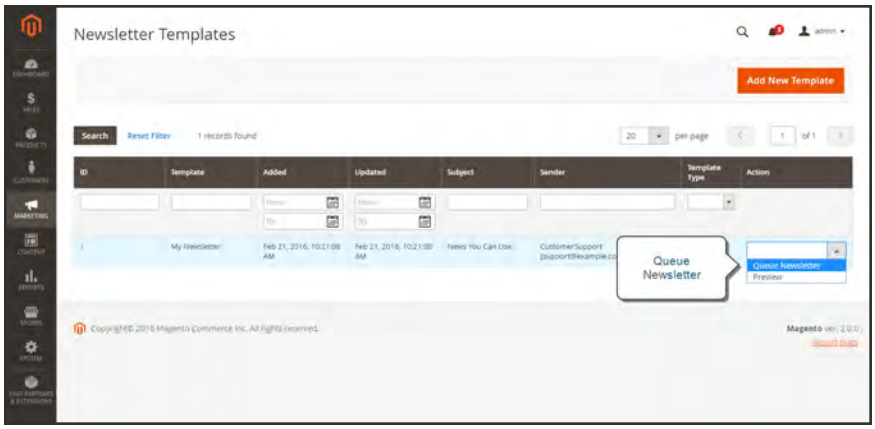
g. Tap **Preview Template** to see how it looks. Then, make any changes that are needed.

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

After you save a template, a Save As button appears next time you edit the template. You can use the Save As button to save variations of the template without affecting the original.

Sending Newsletters

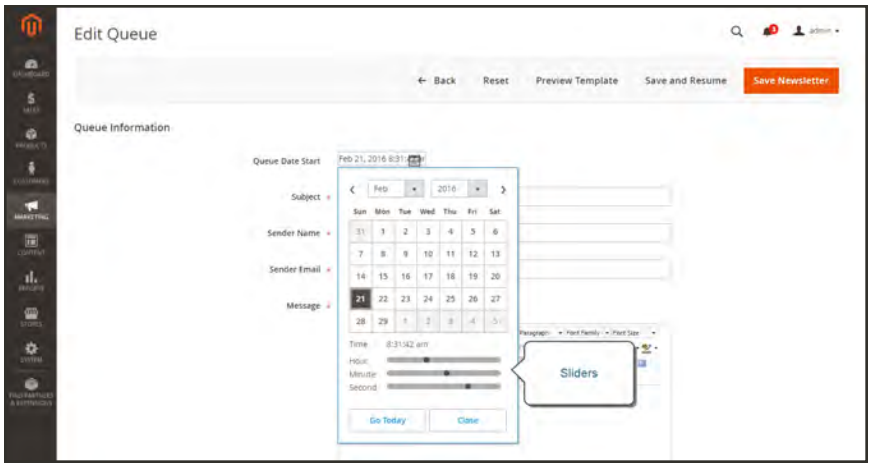
To manage the load on the server, newsletters with many subscribers are sent in batches. The process is managed as a queue of separate batches. Any problems that occur during the transmission appear on the Newsletter Problem Report.



Queue Newsletter Action

To send a newsletter:

1. Find the newsletter to be sent in the Newsletter Templates list. Then, set the **Action** column to "Queue Newsletter."
2. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Queue**.
3. Both the **Queue Start** and **Queue End** dates can be defined as a range. Use the **Calendar** to select the date for each. The value in the date field reflects the system date and time.
4. Use the sliders to set the **Hour**, **Minute**, and **Second** that the transmission is to begin.



Newsletter Queue Information

Magento sends newsletters in batches at the specified time, according to the start and end dates.. You can check the newsletter queue periodically to check the status and see how many have been processed.

Newsletter Queue

To check for problems:

1. On the Admin sidebar, 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 your newsletters, you can export your subscription list as a CSV or XML file.

Unsubscribe

To cancel a subscription:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Subscribers**.
2. Find the subscriber in the list. 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, and Store View.
2. Set the **Export to** control to one of the following:
   - CSV
   - XML
3. Do one of the following:
   - Use the **Mass Actions** control in the header of the first column to select the subscribers to include in the export.
   - Mark the checkbox in the first column of each subscriber to include in the export.
4. Tap **Export**. Look for the prompt at the bottom of the screen, and **Save** the file.

Export Newsletter Subscribers

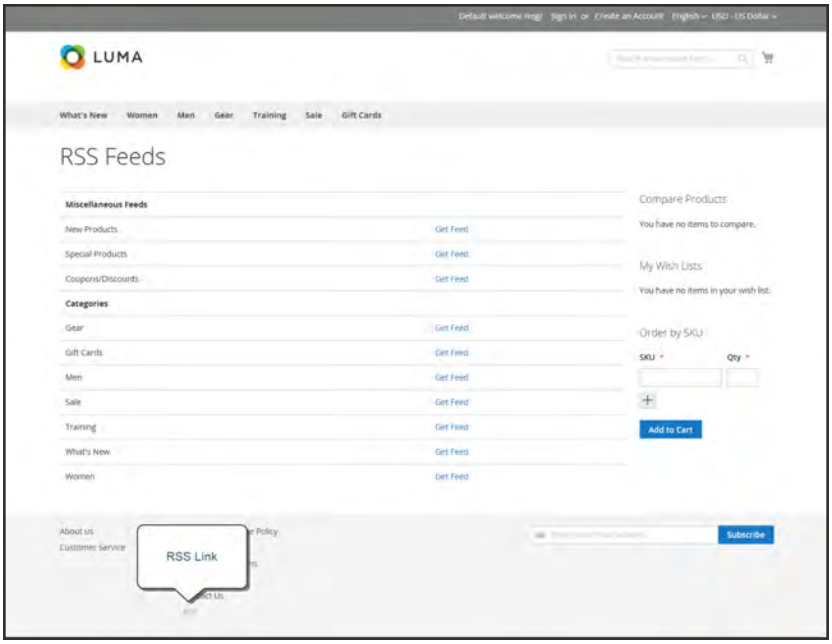
CHAPTER 33:

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.

The orange RSS symbol is typically used to represent 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.



RSS Feeds

[1]Software that is used to read syndicated content from RSS feeds.

Setting Up RSS Feeds

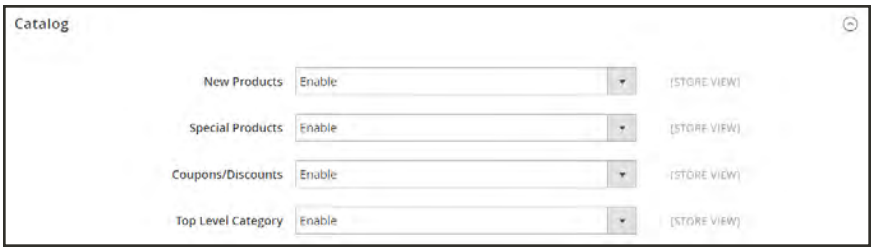
When RSS feeds are enabled, any additions to products, specials, categories, and coupons are automatically sent to the subscribers of each feed. A link to all RSS feeds that you publish is in the footer of your store.

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 **Current Configuration Scope** to the store view where you want the feeds to be available.
3. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
4. Expand the **Rss Config** section. Then, set **Enable RSS** to "Enable."

Enable RSS Feeds

5. Expand the **Wishlist** section. Then, set **Enable RSS** to "Enable."
6. Expand the **Catalog** section, set any, or all of the following feeds to "Enable."
   - New Products
   - Special Products
   - Coupons/Discounts
   - Top Level Category



Catalog

   a. Expand the **Order** section. Then, set **Customer Order Status Notification** to "Enable."
7. When complete, tap **Save Config**.

Types of RSS Feeds

RSS FEED	DESCRIPTION
Wish List	When enabled, an RSS feed link appears at the top of customer wish list pages. Additionally, the wish list sharing page includes a checkbox that lets you include a link to the feed from shared wish lists.
New Products	Publishes notification of new products added to the catalog.
Special Products	Publishes notification of any products with special pricing.
Coupons / Discounts	Publishes notification of any special coupons or discounts that are available in the store.
Top Level Category	Publishes notification of any change to the top-level category structure of your catalog, which is reflected in the main menu.
Customer Order Status	Gives customers the ability to track their order status by RSS feed. When enabled, an RSS feed link appears on the order.

Notes

CHAPTER 34:

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.

Adding Predefined Variables

Predefined variables are easy to add to content email templates and content pages to personalize communications.

Predefined Variables for Email Template

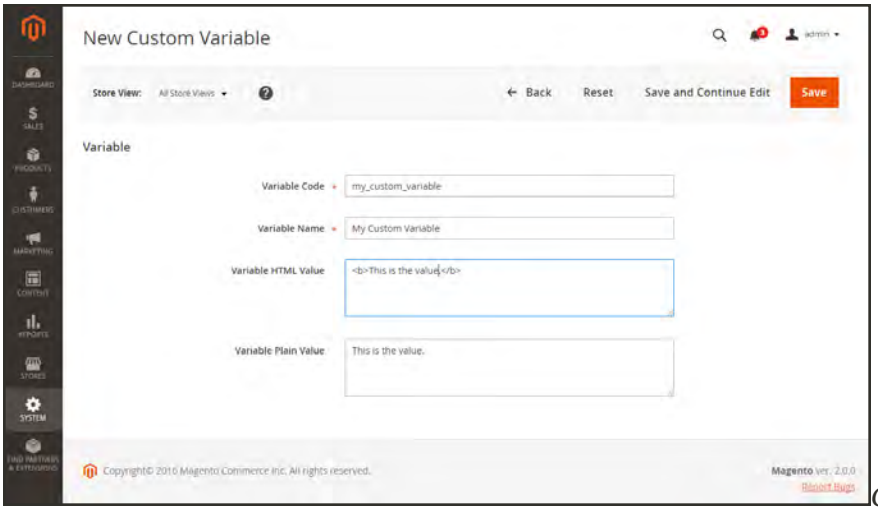
To add a variable to an email template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Do one of the following:
   - Open an existing template.
   - Create 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. When complete, tap **Save Template**.

Creating Custom Variables

If you know a little basic HTML, you can create custom variables and use a markup tag to incorporate them into pages, blocks, banners, and email templates.

```
{{CustomVar code= "my_custom_variable"}}
```

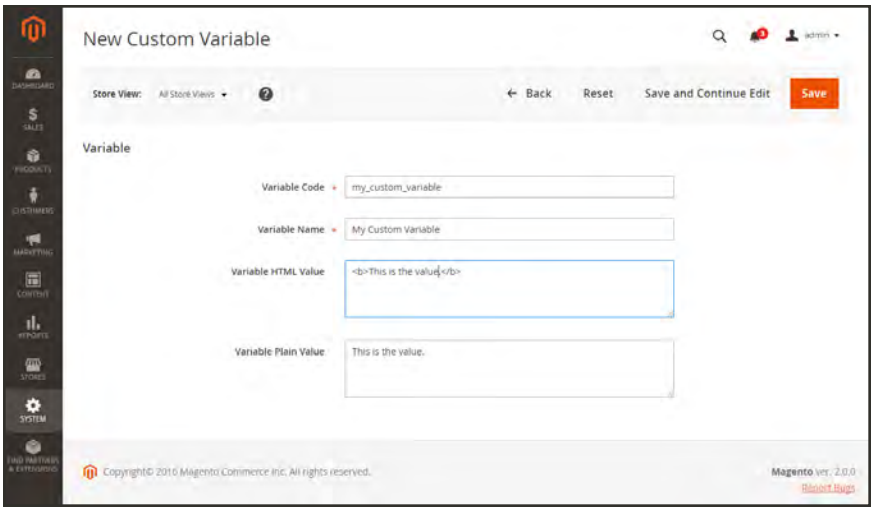


Custom Variables

To create a custom variable:

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Custom Variables**.
2. Tap **Add New Variable**.
3. Enter an identifier in the **Variable Code** field. Use all lowercase characters, without spaces. You can use an underscore character for a space.
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 a formatted version of the value using basic HTML tags.
   - 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.



New Custom Variable

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

Markup Tags

A markup tag is a snippet of code that contains a relative reference to an object in your store, such as a variable, URL, image, or block. Markup tags can be incorporated into the HTML of content pages, blocks, email templates, newsletters, and so on.

Markup tags are enclosed in double, curly braces, and can either be generated by the Widget tool, or typed directly into HTML content. For example, rather than hard-coding the full path to a page, you can use a markup tag to represent the store URL. The markup tags featured in the following examples include:

Custom Variable

The Variable markup tag can be used to insert a custom variable into an email templates, blocks, newsletters, and content pages,

```
{{CustomVar code= "my_custom_variable"}}
```

Store URL

The Store URL markup tag represents the base URL of your website, and is used as a substitute for the first part of a full URL, including the domain name. There are two versions of this markup tag: One that goes directly to your store, and the other with a forward slash at the end that is used when a path is added.

```
{{store url='apparel/shoes/womens'}}
```

Media URL

The dynamic media URL markup tag represents the location and file name of an image that is stored on a content delivery network (CDN). The tag can be used to place an image on a page, block, banner, or email template.

```
{{media url='shoe-sale.jpg'}}
```

Block ID

The Block ID markup tag is one of the easiest to use, and can be used to place a block directly on a CMS page, or even nested inside another block. You can use this technique to modify a block for different promotions or languages. The Block ID markup tag references a block by its identifier.

```
{{block id='block-id'}}
```

Template Tag

A template tag references a PHTML template file, and can be used to display the block on a CMS page or static block. The code in the following example can be added to a page or block to display the Contact Us form.

"Contact Us" Template Tag

```
{{block type="core/template" name="contactForm"
template="contacts/form.phtml"}}
```

The code in the next example can be added to a page or block to display the a list of products in a specific category, by category ID.

"Category Product List" Template Tag

```
{{block type="catalog/product_list" category_id="22"
template="catalog/product/list.phtml"}}
```

Widget Code

The Widget tool can be used to display lists of products, or to insert complex links, such as one that goes to a specific product page, based on product ID. The code that is generated includes the block reference, location of the code module, and corresponding PHTML template. After the code is generated, you can copy and paste it from one place to another.

The code in the following example can be added to a page or block to display the list of new products.

"New Products Grid" Code

```
{{widget type="catalog/product_widget_new"
display_type="new_products" products_count="10"
template="catalog/product/widget/new/content/new_grid.phtml"}}
```

The code in the next example can be added to a page or block to display a link to a specific product, by product ID.

"Link to Product" Code

```
{{widget type="catalog/product_widget_link" anchor_text="My Product
Link"
title="My Product Link" template="catalog/product/widget/link/link_
block.phtml"
id_path="product/31"}}
```

Using Markup Tags in Links

You can use markup tags with HTML anchor tags, and link directly to any page in your store. The link can be incorporated into content pages, blocks, banners, or email and newsletter templates. You can also use this technique to link an image to a specific page.

Process Overview:

Step 1: Identify the Destination URL

Step 2: Add the Markup to the URL

Step 3: Complete the Anchor Tag

Step 1: Identify the Destination URL

If possible, navigate to the page that you want to link to, and copy the full URL from the address bar of your browser. The part of the URL that you need comes after the "dot com forward slash." Otherwise, copy the URL Key from the CMS page that you want to use as the link destination.

Full URL to Category Page

```
http://mystore.com/apparel/shoes/womens

http://mystore.com/apparel/shoes/womens.html
```

Full URL to Product Page

```
http://mystore.com/apparel/shoes/womens/nine-west-pump

http://mystore.com/apparel/shoes/womens/nine-west-pump.html
```

Full URL to CMS Page

```
http://mystore.com/about-us
```

Step 2: Add the Markup to the URL

The Store URL tag represents the base URL of your website, and is used as a substitute for the "http address" part of the store URL, including the domain name and "dot com." There are two versions of the tag, which you can use, depending on the results you want to achieve.

`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

```
<a href="{{markup tag goes here}}">Link Text</a>
```

2. Paste the completed anchor tag into the code of any CMS page, block, banner, or email template, where you want the link to appear.

Complete Link with Markup

```
<a href="{{store url='apparel/shoes'}}">Shoe Sale</a>
```

Variable Reference

Most email templates have a section of additional variables that are specific to the template. The following are examples of some frequently used templates.

Email Template Variables

VARIABLE	MARKUP TAG
Email Footer Template	`{{template config_path="design/email/footer_template"}}`
Email Header Template	`{{template config_path="design/email/header_template"}}`
Email Logo Image Alt	`{{var logo_alt}}`
Email Logo Image URL	`{{var logo_url}}`
Email Logo Image Height	`{{var logo_height}}`
Email Logo Image Width	`{{var logo_width}}`
Template CSS	`{{var template_styles|raw}}`

Store Contact Information Variables

VARIABLE	MARKUP TAG
Base Unsecure URL	`{{config path="web/unsecure/base_url"}}`
Base Secure URL	`{{config path="web/secure/base_url"}}`
General Contact Name	`{{config path="trans_email/ident_general/name"}}`
General Contact Email	`{{config path="trans_email/ident_general/email"}}`

Store Contact Information Variables (cont.)

VARIABLE	MARKUP TAG
Sales Representative Contact Name	`{{config path="trans_email/ident_sales/name"}}`
Sales Representative Contact Email	`{{config path="trans_email/ident_sales/email"}}`
Custom1 Contact Name	`{{config path="trans_email/ident_custom1/name"}}`
Custom1 Contact Email	`{{config path="trans_email/ident_custom1/email"}}`
Custom2 Contact Name	`{{config path="trans_email/ident_custom2/name"}}`
Custom2 Contact Email	`{{config path="trans_email/ident_custom2/email"}}`
Store Name	`{{config path="general/store_information/name"}}`
Store Phone Telephone	`{{config path="general/store_information/phone"}}`
Store Hours	`{{config path="general/store_information/hours"}}`
Country	`{{config path="general/store_information/country_id"}}`
Region/State	`{{config path="general/store_information/region_id"}}`
Zip/Postal Code	`{{config path="general/store_information/postcode"}}`
City	`{{config path="general/store_information/city"}}`
Street Address 1	`{{config path="general/store_information/street_line1"}}`
Street Address 2	`{{config path="general/store_information/street_line2"}}`
Store Contact Address	`{{config path="general/store_information/address"}}`

New Account Template Variables

VARIABLE	MARKUP TAG
Customer Account URL	`{{var this.getUrl($store, 'customer/account/')}}`
Customer Email	`{{var customer.email}}`
Customer Name	`{{var customer.name}}`

New Order Template Variables

VARIABLE	MARKUP TAG
Billing Address	`{{var formattedBillingAddress|raw}}`
Email Order Note	`{{var order.getEmailCustomerNote()}}`
Order ID	`{{var order.increment_id}}`
Order Items Grid	`{{layout handle="sales_email_order_items" order=$order area="frontend"}}`
Payment Details	`{{var payment_html|raw}}`
Shipping Address	`{{var formattedShippingAddress|raw}}`
Shipping Description	`{{var order.getShippingDescription()}}`

Notes

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 searches, and how to make your products easy to find. Finally, you'll learn best practices and techniques that you can use to drive qualified traffic to your site.

Contents

CHAPTER 35:

Catalog Navigation

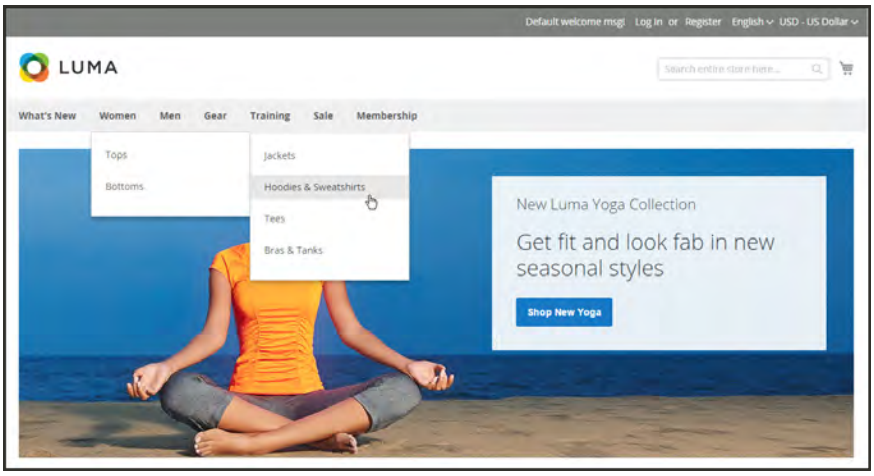
The term **navigation**[1] refers to the methods shoppers use to move from page to page throughout your store. The main menu, or top navigation of your store is actually a list of category links, and provides easy access to the products in your catalog. You will also find categories in the breadcrumb 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.

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.



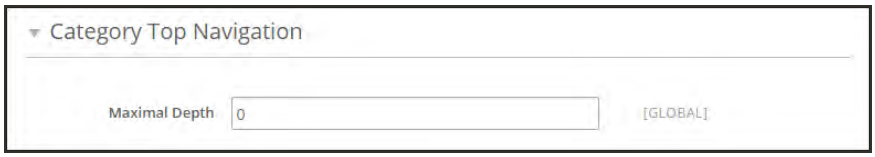
Top Navigation

The category structure of your catalog can influence how well your site is indexed by search engines. The deeper a category, the less likely it is to be thoroughly indexed. As a general rule, anywhere between one and three levels is considered to be the most effective. The maximum number of levels that are available in your top navigation is set in the system configuration.

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.
4. To limit the number of subcategories that appear in the top navigation, enter the number in the **Maximal Depth** field.

   The default Maximal Depth value is zero, which does not place a limit on the number of subcategory levels.
5. When complete, tap **Save Config**.

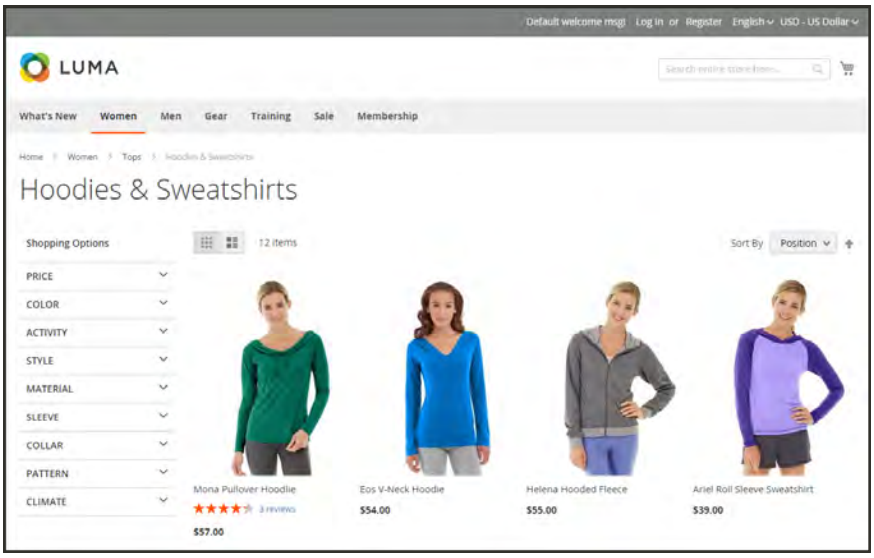


Category Top Navigation

Breadcrumb Trail

A breadcrumb trail is a set of links that shows where you are in relation to other pages in the store. You can click any link in the breadcrumb trail to return to the previous page. Here's an example of a breadcrumb trail from the demo store:

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.



Breadcrumb Trail

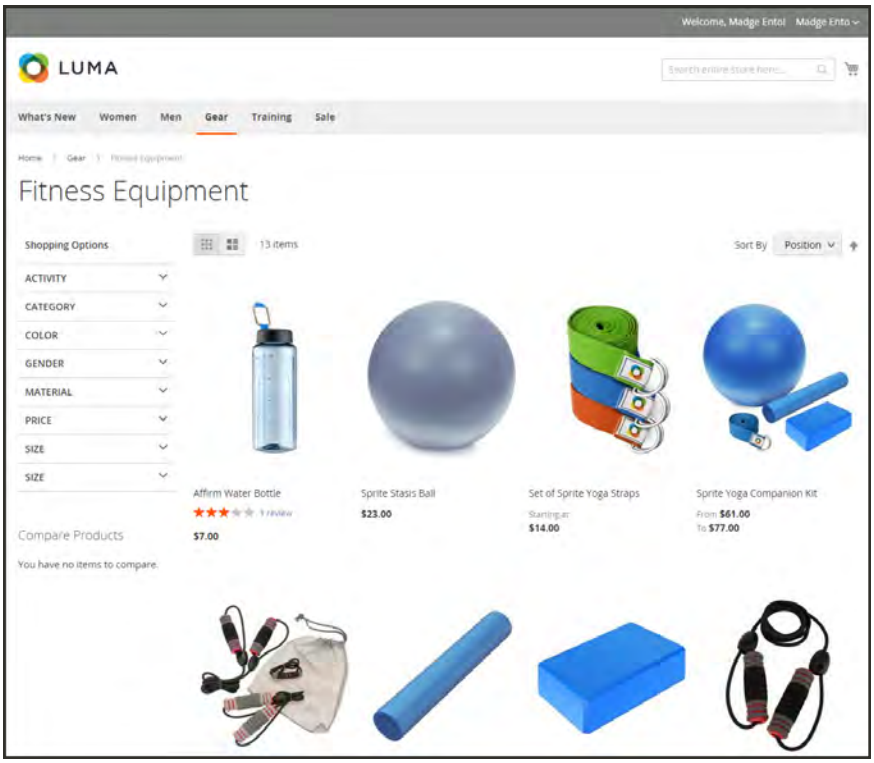
To add breadcrumbs to CMS pages:

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. Set **Show Breadcrumbs for CMS Pages** to "Yes."
3. When complete, tap **Save Config**.

Show Breadcrumbs for CMS Pages

Product Listings

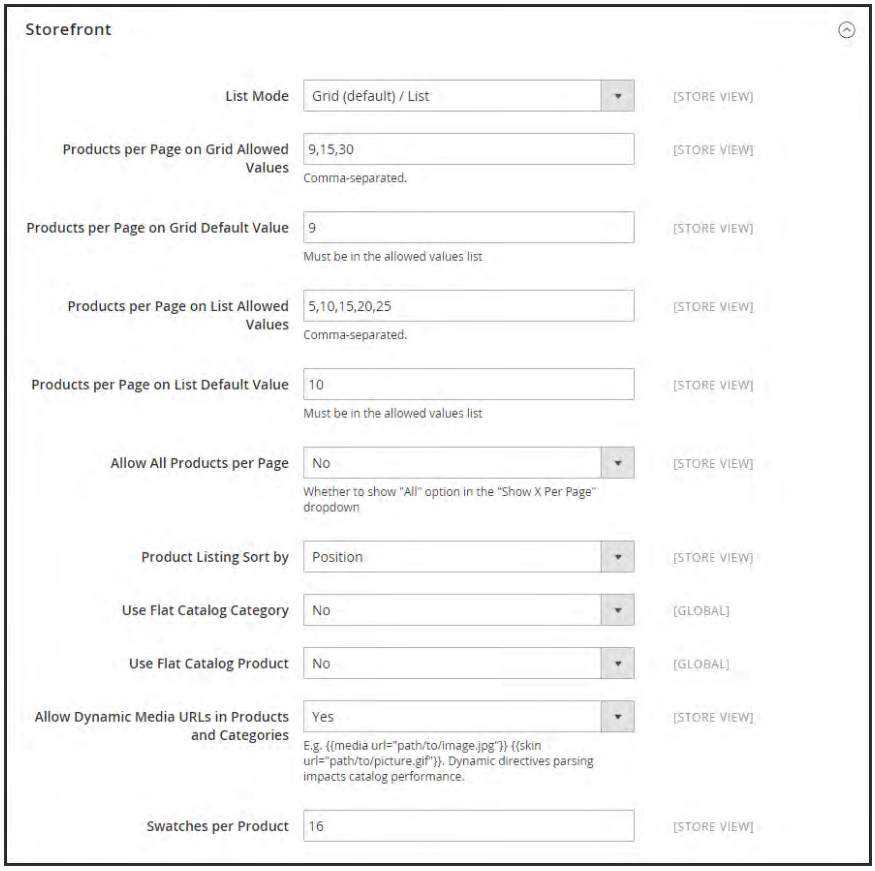
Product listings can be set to appear by default as either a list or grid. You can also determine how many products appear per page, and which attribute is used to sort the list. Each catalog page with a product list has a set of controls that can be used to sort the products, change the format of the list, sort by attribute, and advance from one page to the next.



Products Displayed as a Grid

To configure product listings:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down and in the panel on the left, tap **Catalog**. Then choose **Catalog**.
3. Expand the **Storefront** section, and do the following:



Storefront

a. Set the default **List Mode** to one of the following:
   - Grid Only
   - List Only
   - Grid (default) / List
   - List (default / Grid
b. In the **Products per Page on Grid Allowed Values** field, enter the number of products that you want to appear per page when shown in grid format. To enter a selection of values, separate each number by a comma.
c. In the **Products per Page on Grid Default Value** field, enter the default number of products to appear in the grid per page.

d. In the **Products per Page on List Allowed Values** field, enter the number of products that you want to appear per page when shown in list format. To enter a selection of values, separate each number by a comma.

e. In the **Products per page on List Default Value** field, enter the default number of products that appear in the list, per page.

f. To give customers the option to list all products, set **Allow All Products on Page** to "Yes."

g. Set **Product Listing Sorted** by to the default attribute that is initially used to sort the list.

4. If using a flat catalog, do the following:

   a. To display a flat category listing of products, set **Use Flat Catalog Category** to "Yes."

   b. To display a flat product listing, set **Use Flat Catalog Product** to "Yes."

5. If you want to allow dynamic references for media assets in category and product URLs, set **Allow Dynamic Media URLs in Products and Categories** to "Yes."

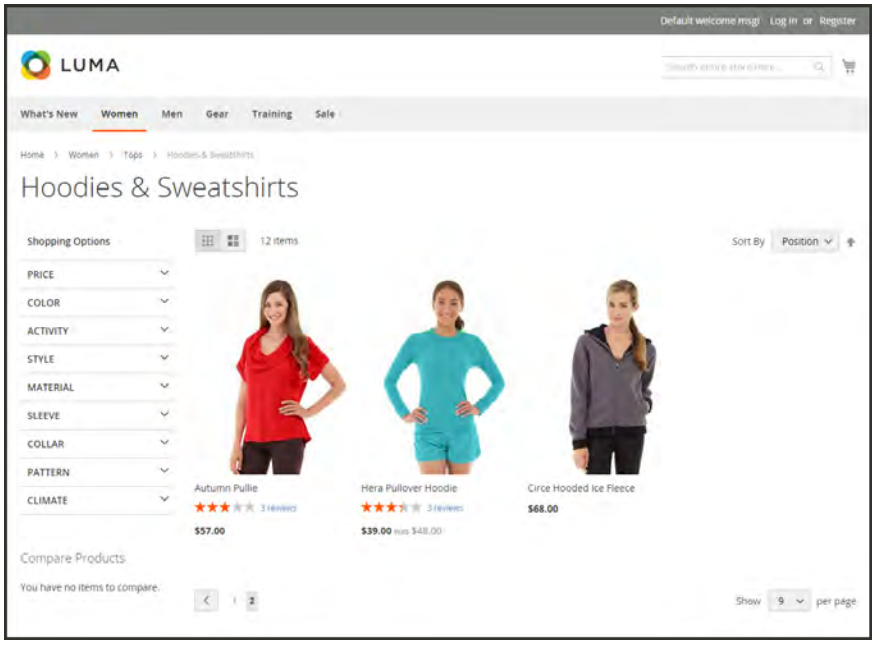
6. When complete, tap **Save Config**.

Page Controls

CONTROL	DESCRIPTION
View As	Displays the list in either a Grid or List format.
Sort By	Changes the sort order of the list.
Show Per Page	Determines how many products appear per page.
Pagination Links	Navigation links to other pages.

Pagination Controls

The Pagination settings appear at the top and bottom of the list, and control the format of the pagination links for product listings. You can set the number of links that appear in the control, and configure the Next and Previous links. For the pagination links to appear, there must be more products in the list than are allowed per page in the product list configuration.



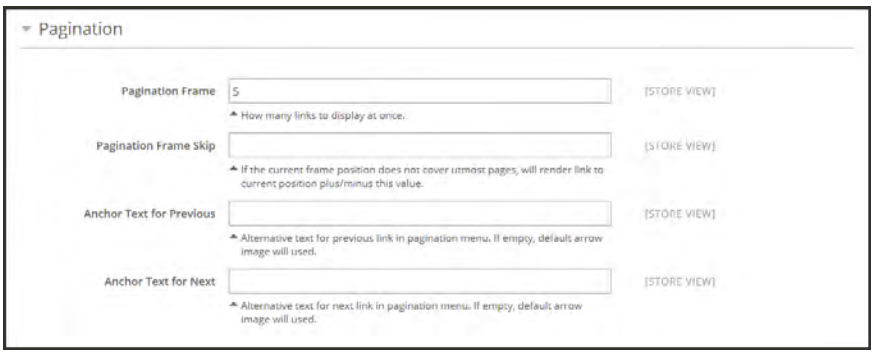
Pagination Controls

Pagination Controls

	View As Displays the list in either a Grid or List format.
Sort By Position	Sort By Changes the sort order of the list.
Show 9 per page	Show Per Page Determines how many products appear per page.
< 1 2	Pagination Links Navigation links to other pages.

To configure the pagination controls:

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



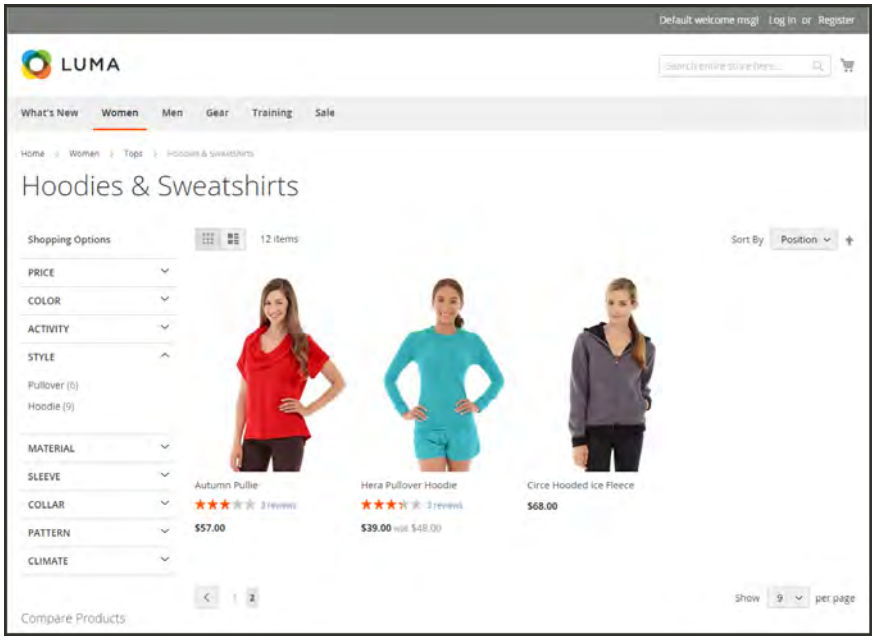
Pagination

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

Layered Navigation

Layered navigation makes it easy to find products based on category, price range, or any other available attribute. Layered navigation usually appears in the left column of search results and category pages and sometimes on the home page. The standard navigation includes a “Shop By” list of categories and price range. You can configure the display of layered navigation, including product count and price range.

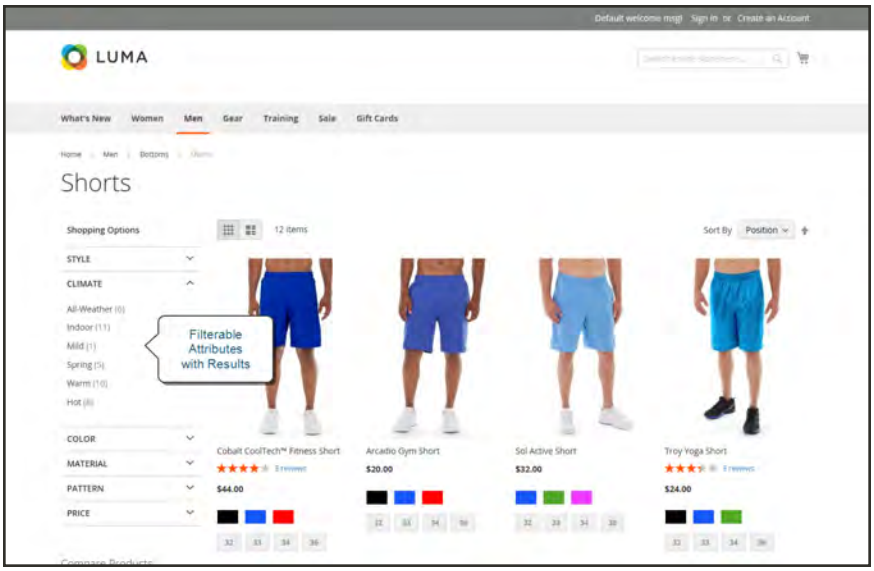


Layered Navigation by Category and Price

Layered Navigation with Filterable Attributes

Layered navigation can be used to find products by category or by attribute. For example, when a shopper chooses the Mens/Shorts category from the top navigation, the initial results include all products in the category. The list can be filtered further by choosing a specific style, climate, color, material, pattern, or price—or a combination of values. Filterable attributes appear in an expanding section that lists each attribute value. As an option, the number of matching results can appear in parentheses after the value.

The attribute properties, combined with the product input type determines which attributes can be used for layered navigation. Layered navigation is available only for "anchor" categories, but can also be added to search results pages. The Catalog Input Type for Store Owner property of each attribute must be set to "Dropdown," "Multiple Select," or "Price." To make the attributes filterable, the Use in Layered Navigation property of each must be set to either "Filterable (with results)" or "Filterable (no results)."



Filterable Attributes

The following instructions show how to set up basic layered navigation with filterable attributes. For advanced layered navigation with price steps, see: Price Navigation.

Process Overview:

Step 1: Set Up the Attribute Properties

Step 2: Make the Category an Anchor

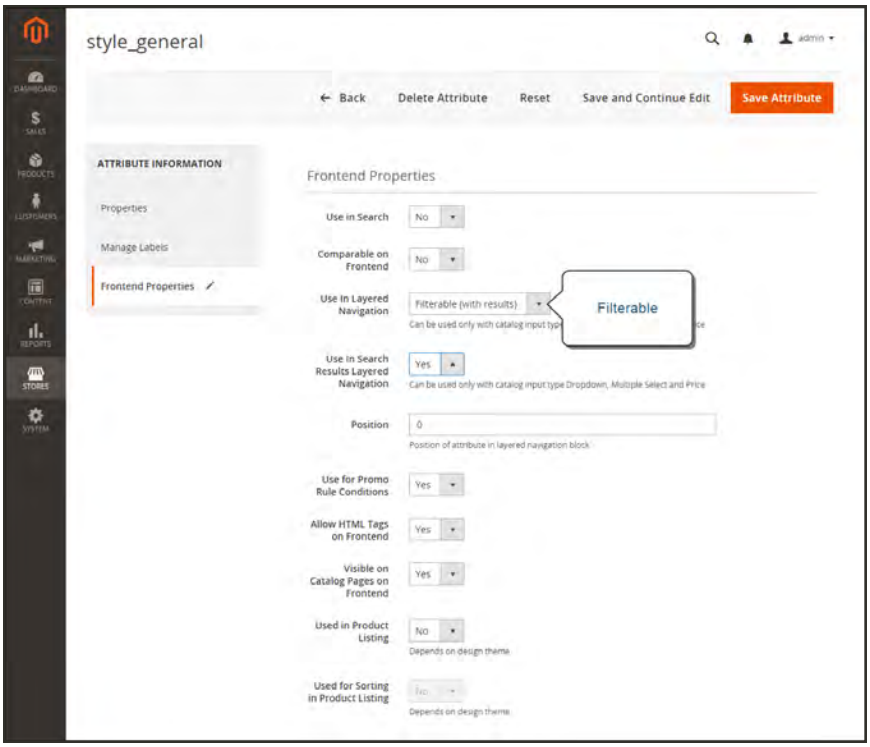
Step 3: Test the Results

Step 1: Set Up the Attribute Properties

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product.**
2. Find the attribute in the list, and open in edit mode. Then, do the following:

Filtered Search on Attribute Code

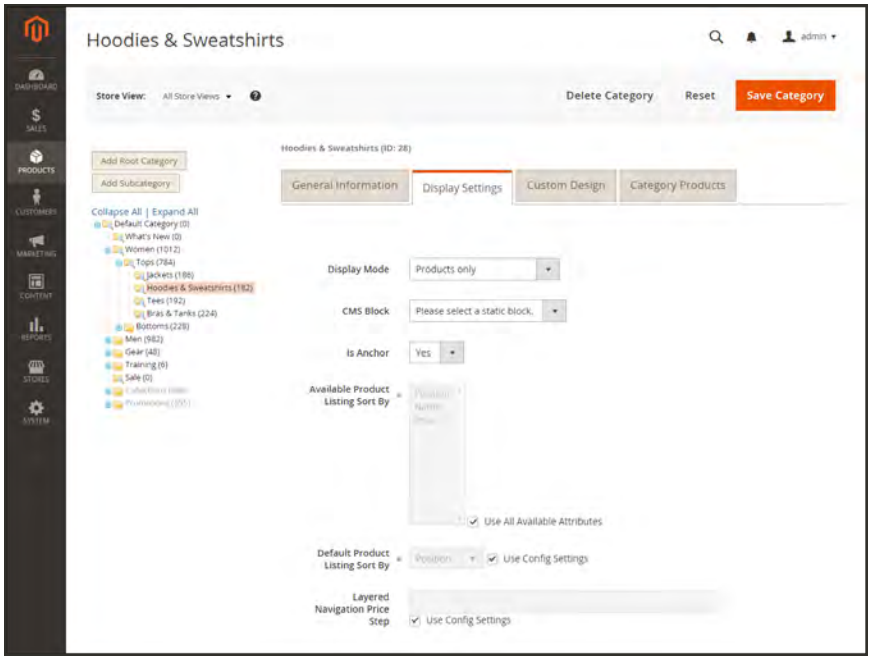
   a. In the panel on the left, choose **Frontend Properties**. Then, set **Use In Layered Navigation** to one of the following:
      - Filterable (with results)
      - Filterable (no results)
   b. Set **Use In Search Results Layered Navigation** to "Yes."
3. Repeat these steps for each attribute that you want to include in layered navigation.



Attribute Frontend Properties

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. On the **Display Settings** tab, set **Is Anchor** to "Yes."
4. Tap **Save Category**.



Category Display Settings

Step 3: Test the Results

To test the setting, go to your store and choose the category in the top navigation. The selection of filterable attributes appears in the layered navigation section of the category page.

Price Navigation

Price navigation can be used to distribute products by price range in layered navigation. You can also split each range in intervals. There are ways to calculate price navigation:

- Automatic (Equalize Price Ranges)
- Automatic (Equalize Product Counts)
- Manual

With the first two methods, the navigation steps are calculated automatically. The manual method lets you specify a division limit for price intervals. The following example shows the difference between price navigation steps of 10 and 100.

Iterative splitting provides the best distribution of products among price ranges. With iterative splitting, after choosing the $0.00-$99 range, the customer can drill-down through several sub-ranges of prices. Price-range splitting stops when the number of products reaches the threshold set by the Interval Division Limit.

Example: Price Navigation Steps

PRICE STEP BY 10	PRICE STEP BY 100
$20.00 - $29.99 (1)	$0.00 - $99.99 (4)
$30.00 - $39.99 (2)	$100 - $199.99 (5)
$70.00 - $79.99 (1)	$400.00 - $499.99 (2)
$100.00 - $109.99 (1)	$700.00 and above (1)
$120.00 - $129.99 (2)	
$150.00 - $159.99 (1)	
$180.00 - $189.99 (1)	
$420.00 - $429.99 (1)	
$440.00 - $449.99 (1)	
$710.00 and above (1)	

To configure price navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Layered Navigation** section.
4. To show the number of products in parentheses after each filtered item, set **Display Product Count** to “Yes.”
5. Set **Price Navigation Steps Calculation** to one of the following methods:

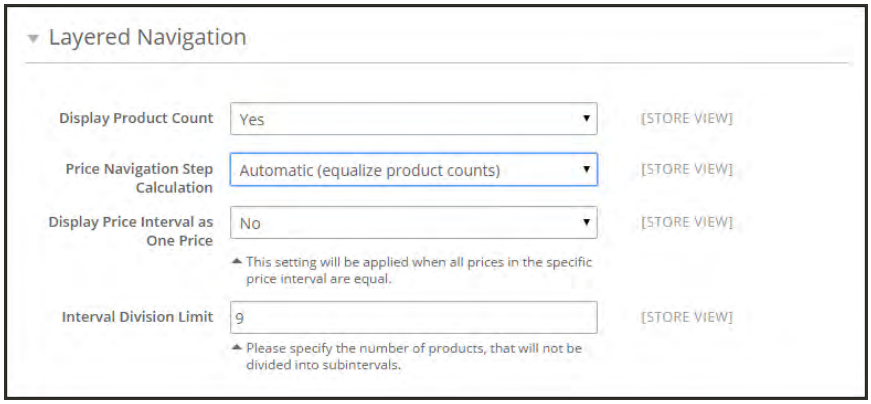
Method 1: Automatic (equalize price ranges)

Leave **Price Navigation Steps Calculation** set to the default, "Automatic (Equalize Price Ranges.)" This setting uses the standard algorithm for price navigation.

Layered Navigation

Method 2: Automatic (equalize product counts)

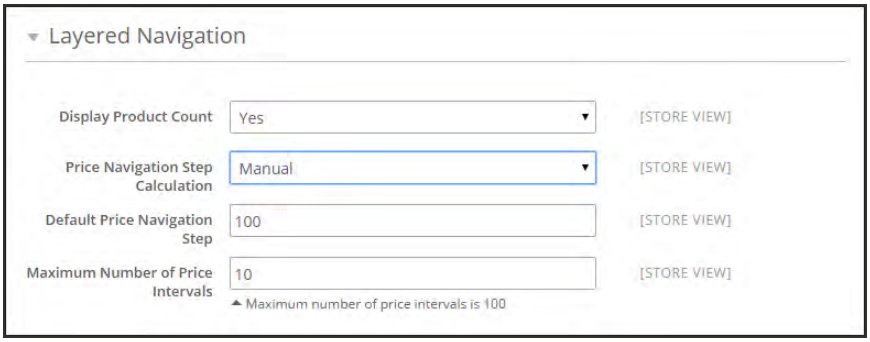
1. Set **Price Navigation Steps Calculation** to "Automatic (equalize product counts)."
2. Set **Display Price Interval as One Price** to "Yes" if you want to display a single price when multiple products with the same price.
3. In the **Interval Division Limit** field, enter the threshold for a number of products within a price range. The range cannot be further split beyond this limit., The default value is 9.



Automatic (equalize product counts)

Method 3: Manual

1. Set **Price Navigation Steps Calculation** to "Manual."
2. Enter a value to determine the **Default Price Navigation Step**.
3. Enter the **Maximum Number of Price Intervals** allowed, up to 100.



Manual

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

Configuring Layered Navigation

The layered navigation configuration determines if a product count appears in parentheses after each atribute, 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

   a. To display the number of products found for each attribute, set **Display Product Count** to "Yes."
   b. Set **Price Navigation Step Calculation** to "Automatic (equalize price ranges)."
4. When complete, tap **Save Config**.

CHAPTER 36:

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.

Magento eBook

Use your website's site search data to better understand your customer's needs. Then leverage that data and convert customer queries into sales. Get the eBook now!

Quick Search

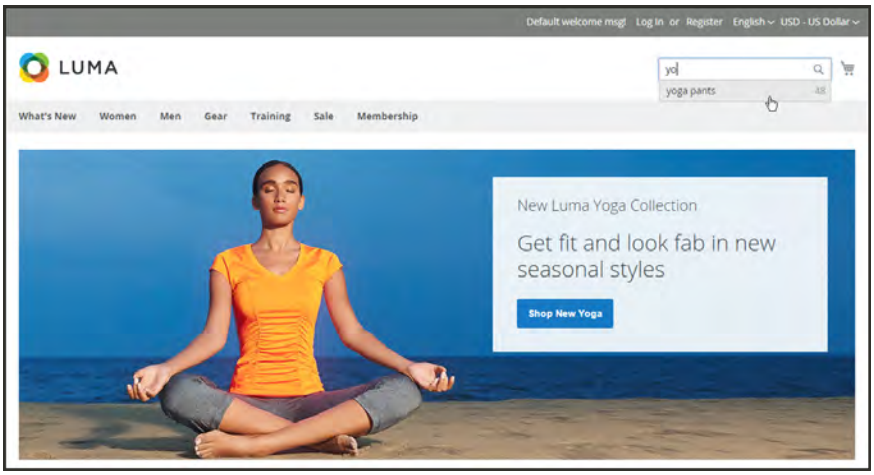
The Search box in the header of the store helps visitors find products in your catalog. The search text can be the full or partial product name, or any other word or phrase that describes the product. The search terms that people use to find products can be managed from the Admin.

To do a quick search:

1. In the **Search** box, enter the first few letters of what you want to find.

   Any matches in the catalog appear below, with the number of results found.

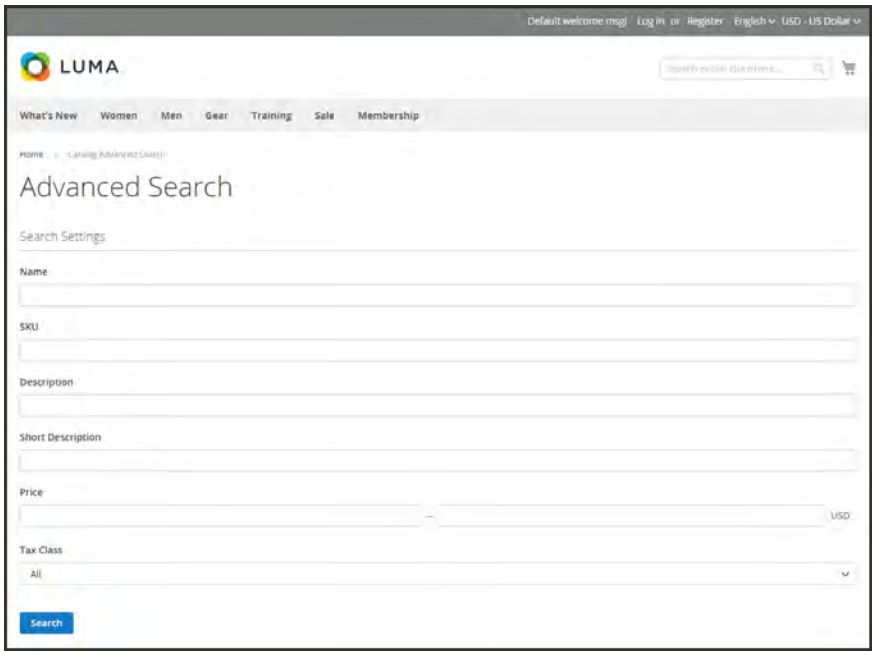
2. Either press the **Enter** key or tap a result in the list of matching products.



Search

Advanced Search

Advanced Search lets shoppers search the catalog based on values entered into a form. Because the form contains multiple fields, a single search can include several parameters. The result is a list of all products in the catalog that match the criteria. A link to Advanced Search is in the footer of your store.

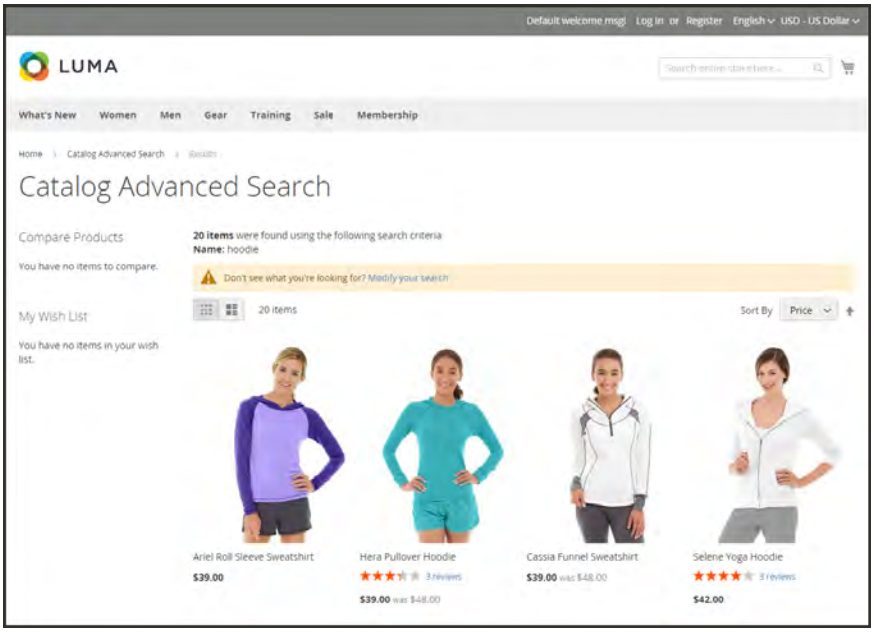


Advanced Search

Each field in the form corresponds to an attribute from your product catalog. To add a field, set the frontend properties of the attribute to “Include in Advanced Search.” As a best practice, include only the fields that customers are most likely to use to find a product, because having too many will slow down the search.

To use advanced search:

1. In the footer of the store, click **Advanced Search**.
2. In the Advanced Search form, full or partial values in as many fields as necessary.
3. Tap **Search** to display the results.



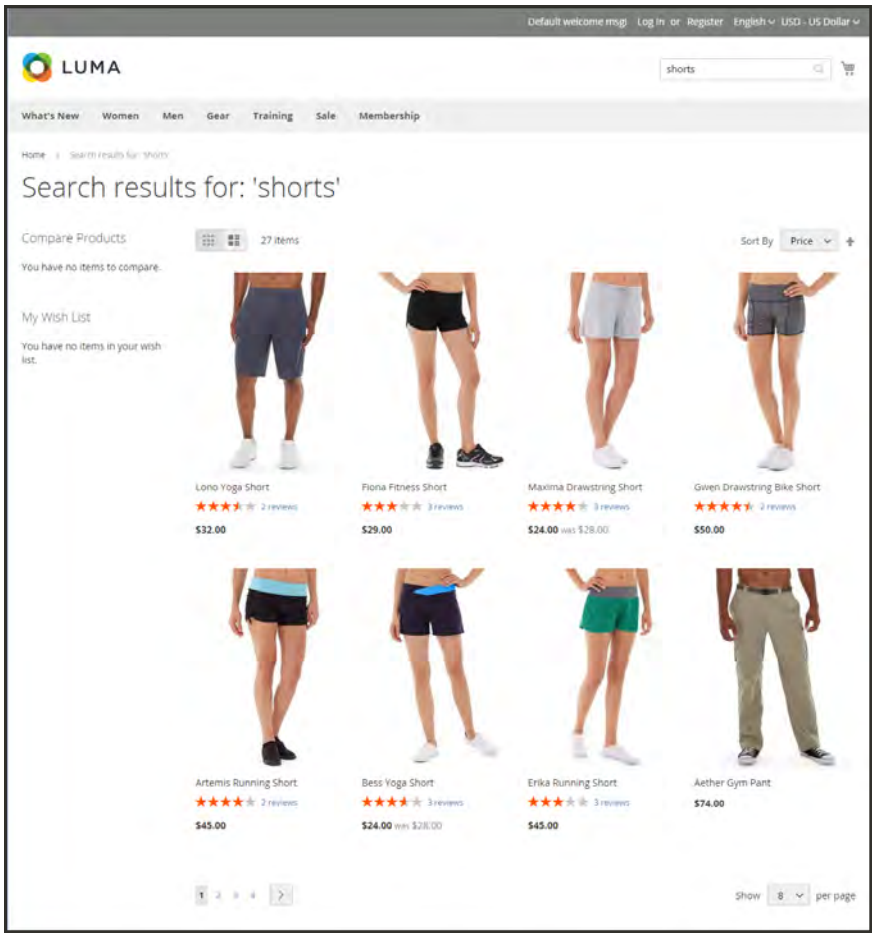
Search Results

4. If you don't see what you are looking for in the search results, tap **Modify your search** and try another combination of criteria.

Search Results

The Search Results list includes all products that match the search criteria entered in the Quick Search box or the Advanced Search form. Every product list in the catalog has essentially the same controls. The only difference is that one is the result of a search query, and the other is the result of navigation.

The results can be formatted as either a grid or list, and sorted by a selection of attributes. Pagination controls appear if there are more products than fit on the page, and are used to move from one page to the next. The number of records per page is determined by the Catalog Frontend configuration. To learn more, see: Product Listings



Search Results with Pagination Controls

Search Suggestions

Your store's search engine can configured to identify misspelled words and offer suggestions. When a customer makes a spelling mistake, the message, "Did you mean:" appears with a link to a suggested product. The number of suggestions offered is specified in the configuration. The configuration is the same for the MySQL and Solr search engines.

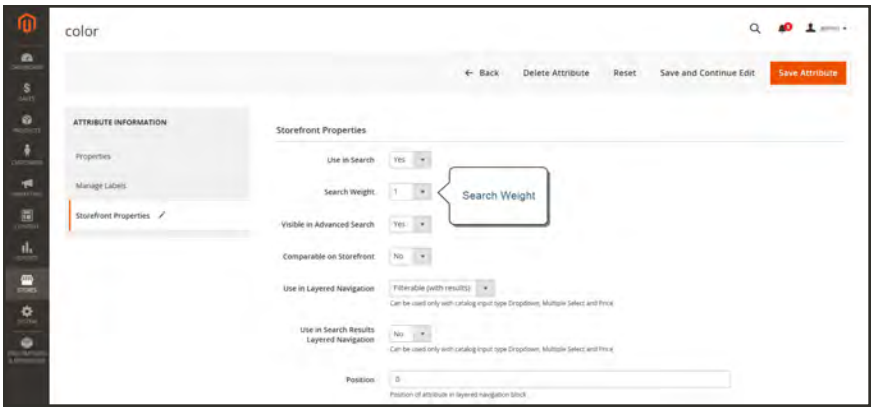
Solr Search Suggestions

To configure suggestions:

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, and do the following:
   a. Set **Enable Search Suggestions** to "Yes."
   b. In the **Search Suggestions Count** field, enter the number of suggestions to offer the customer. The default value is 2.
   c. Set **Show Results Count for Each Suggestion** to "Yes." (Depending on the store theme, this number is usually shown in brackets next to the suggestion.)
4. When complete,tap **Save Config**.

Weighted Search

Product attributes that are enabled for catalog search can be weighted 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 1 and “description” with a search weight of 3. A search for the word “red,” returns a list of products with a color attribute value of “red,” but does not return products with descriptions that contain the word “red.” In this example, the `color` attribute has a greater weight than the `description` attribute.



Search Weight

To set the search weight properties of an attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Find the attribute in the list, and open in edit mode.
3. In the panel on the left, choose **Storefront Properties**. Then, do the following:
   a. To include the attribute in search queries, set **Use in Search** to “Yes.”
   b. To establish the search value of the attribute, set **Search Weight** to a number from 1 to 10, where 10 has the highest priority. If no value is entered, all attributes have a search weight of 1.
   c. To include the attribute as a field on the Advanced Search form, set **Visible in Advanced Search** to “Yes.”
4. When complete, tap **Save Attribute** button.

Configuring Catalog Search

This section explains how to configure Catalog Search for your specific installation. The available options depend on the search engine that is used for your Magento installation.

MySQL

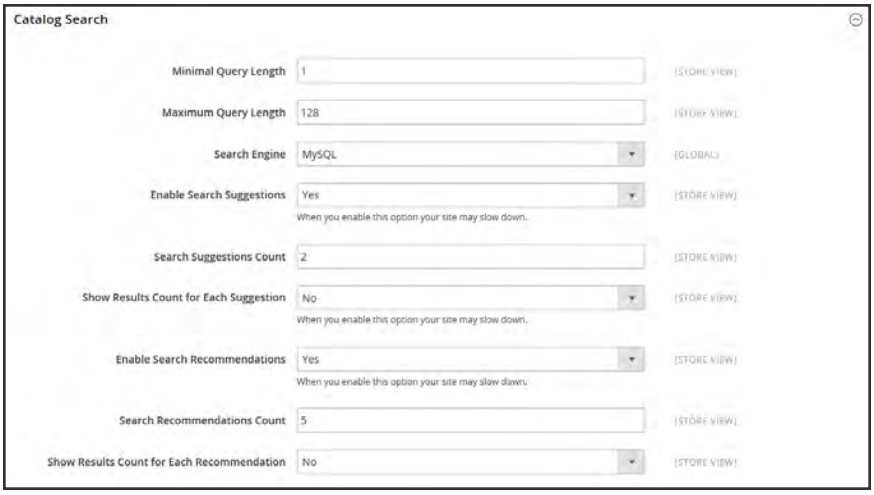
MySQL is the default search engine used by Magento Enterprise Edition 2.0.

Solr

Solr is not included in a standard Magento installation, and must be installed separately. The Solr configuration has a slightly different set of options and features.

MySQL Search

MySQL is the default search engine used by Magento Enterprise Edition 2.0. 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.



MySQL Configuration

To configure MySQL catalog 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, and do the following:
4. To limit the length and word count of search query text, do the following:
   a. Set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
   b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
5. Accept the default, **Search Engine**, "MySQL."
6. To display search suggestions, set **Enable Search Suggestions** to "Yes." Then, do the following:
   a. In the **Search Suggestion Count** field, enter the number of suggestions to offer for each search term that returns no results. The default is 2.
   b. To display the number of search results for each suggested term, set **Show Results Count for Each Suggestion** to "Yes."

7. To offer search recommendations, set **Enable Search Recommendations** to "Yes." Then, do the following:

   a. In the **Search Recommendations Count** field, enter the number of recommendations that you want to offer. The default is 5.

   a. To display the number of results for each recommendation, set **Show Results Count for Each Recommendation** to " Yes."

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

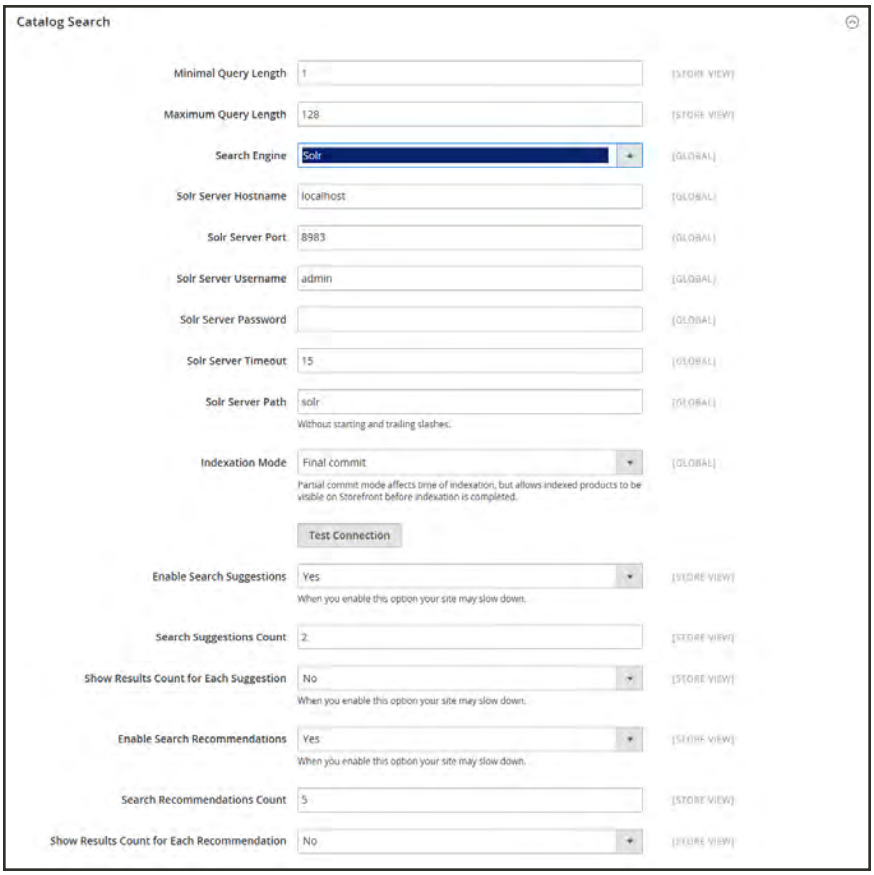
Solr Search

Solr is a standalone, enterprise-scale search server that communicates easily with applications. Because Solr is highly scalable, it is used to power some of the world's most high-traffic Internet sites. This guide includes installation instructions for system administrators, as well configuration instructions and "how to" help for store administrators.

Solr provides improved search performance and search results relevancy, support for spelling, synonyms and stop words, and improved layered navigation performance. Solr is especially recommended for sites with heavy traffic and search loads. Products are added to the search engine index as each product is saved in the Admin, so the index is kept up to date without any need for manual intervention.

All of the attributes that are available for layered navigation are added to Solr index. As a result, Solr can also be used to generate the layered navigation. To add these attributes to Solr search results, the store administrator must enable Solr for catalog navigation.

The following instructions show how to configure the Solr search engine after it has been installed on your server. Solr can reside on the same server as Magento, or on a different server. After the installation, you must complete the configuration from the Admin to establish the connection.



Solr Catalog Search

Step 1: Establish the Connection

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Catalog Search** section. Then, do the following:
   a. Begin with the third field, and set **Search Engine** to "Solr."
   b. Enter the fully-qualified **Solr Server Hostname** or **IP address**. The default is `localhost`.
   c. Enter the number of the port that is assigned as the **Solr Server Port**.
   d. Enter the **Solr Server Username** and **Solr Server Password**.
   e. In the **Solr Server Timeout** field, enter the number of seconds of inactivity that can pass before the connection times out. The default is 15.
   f. For a standard Solr installation, you can accept the default **Solr Server Path**. For a custom deployment, enter the correct path to the installation. The default path is `solr`.
   g. Set **Indexation Mode** to one of the following:

Final commit	(Default) Offers better performance than a partial commit, and users see the results immediately. Indexing begins after all unneeded data is removed and new data is added.
Partial commit	As content is gradually reindexed, users see only the indexed results. All content is removed after reindexing.
Engine autocommit	Content is put into the index queue but is not committed. To use autocommit, you must configure Solr to commit at regular intervals (for example, every 5 minutes) or when a certain number of uncommitted items is reached.

h. To verify the installation, tap **Test Connection**.

4. When the connection is established, tap **Save Config**. Then, continue to the next step to complete the configuration.

Step 2: Configure Solr Search Features

1. Beginning with the first field, set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
2. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
3. Continuing after the Test Connection button, set **Enable Search Suggestions** to "Yes." Then, do the following:
   a. In the **Search Suggestion Count** field, enter the number of suggestions to offer for each query that returns no results. The default is 2.
   b. To display the number of search results for each suggested term, set **Show Results Count for Each Suggestion** to "Yes."
4. To offer search recommendations, set **Enable Search Recommendations** to "Yes." Then, do the following:
   a. In the **Search Recommendations Count** field, enter the number of recommendations that you want to offer. The default is 5.
   b. To display the number of results for each recommendation, set **Show Results Count for Each Recommendation** to " Yes."
5. When complete,tap **Save Config**.

Notes

CHAPTER 37:

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

Setting Up a Flat Catalog

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

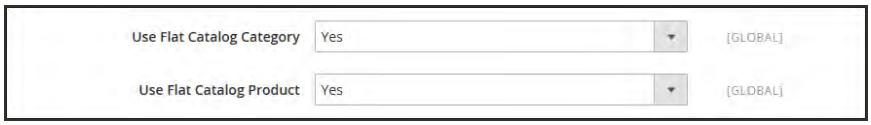
Process Overview:

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."
   b. Set **Use Flat Catalog Product** to "Yes."



Flat Catalog Configuratio

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.

Refresh Cache

Step 2: Verify the Results

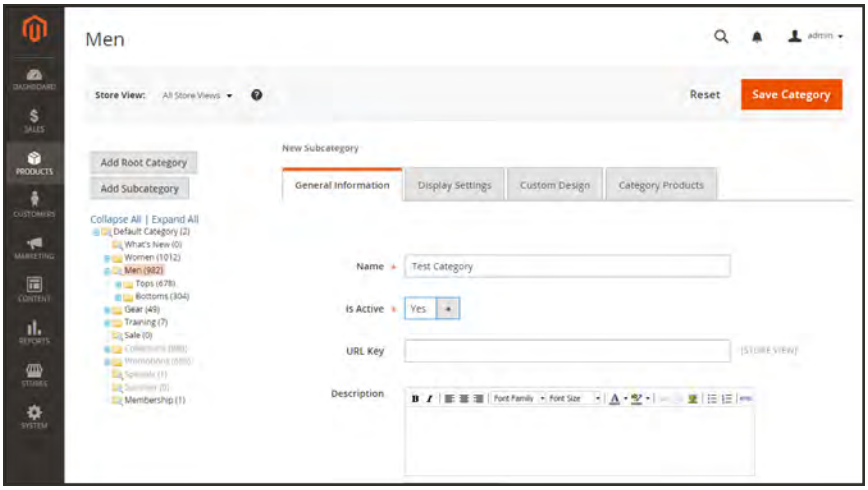
Method 1: Verify the Results for a Single Product

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
   a. In the Inventory list, choose a product to modify. Then, open the product in edit mode.
   b. In the **Name** field, add the text "_DEMO" to 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 job schedule.

Method 2: Verify the Results for Multiple Products

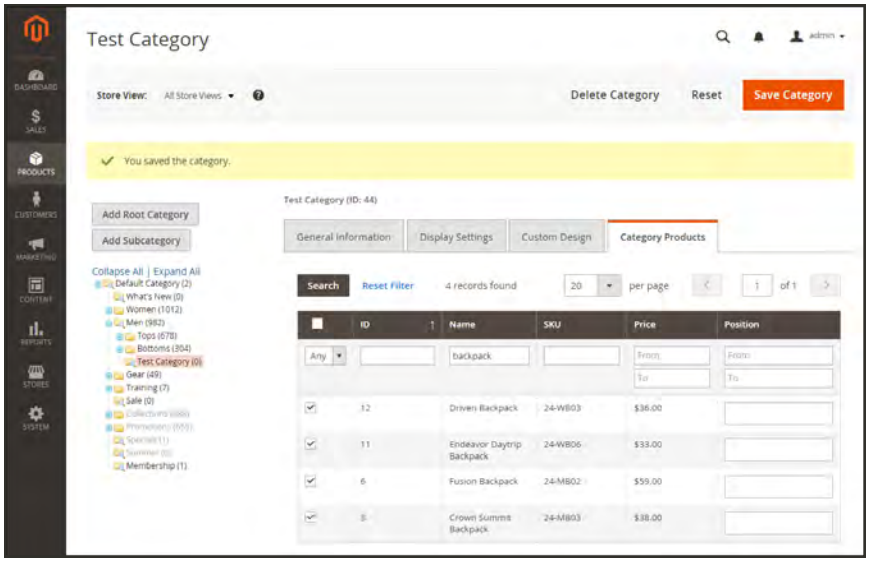
1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. In the upper-left corner, set **Store View** to one of the following:
   - All Store Views
   - A specific store view
3. In the category tree, select an existing category. Tap **Add Subcategory**, and do the following:
   a. In the **Name** field, enter "Test Category."
   b. Set **Is Active** to "Yes."
   c. Click **Save Category**.



Test Subcategory

   d. On the **Category Products** tab, tap **Reset Filter** to display all products.

e. Mark the checkbox of several products to add them to the new category. Then, tap **Save Category**.



Test Category Products

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

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

CHAPTER 38:

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.

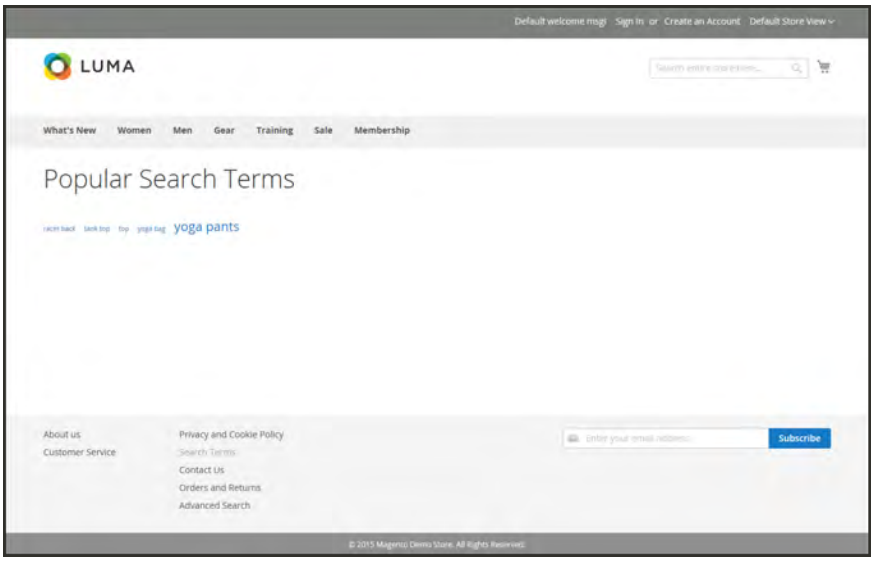
Misspelled Words

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.

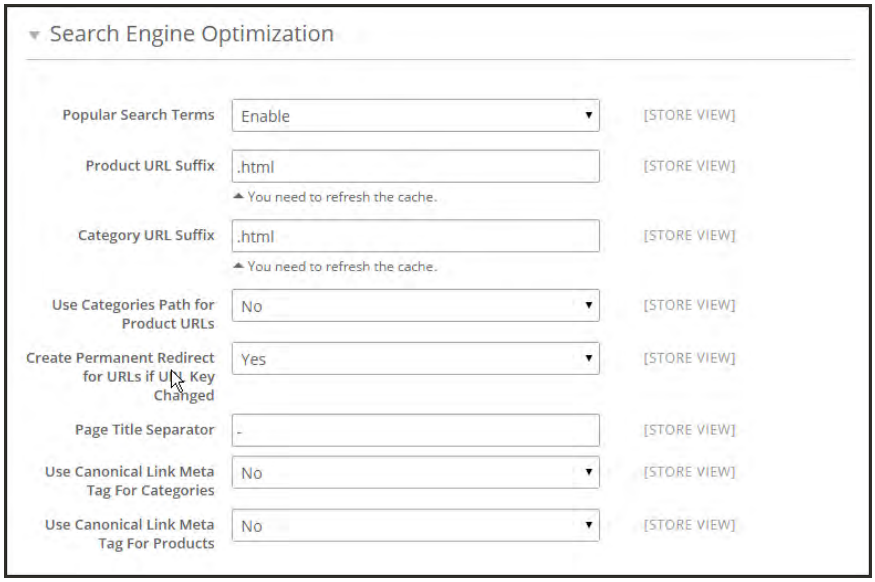
By default, Popular Search Terms is enabled as a search engine optimization tool, but has no direct connection to the catalog search process. Because the Search Terms page is indexed by search engines, any terms on the page can help improve your search engine ranking and the visibility of your store.



Popular Search Terms

To configure Popular Search Terms:

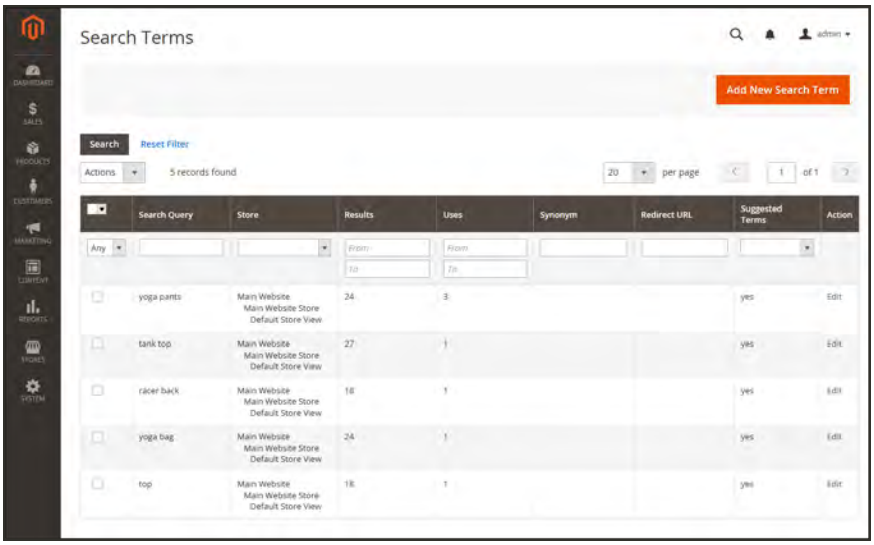
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
1. In the panel on the left under **Catalog**, choose **Catalog**.
2. Expand the **Search Engine Optimizations** section.
3. Set **Popular Search Terms** to "Enable."
4. When complete, tap **Save Config**.



Search Engine Optimization

Adding Search Terms

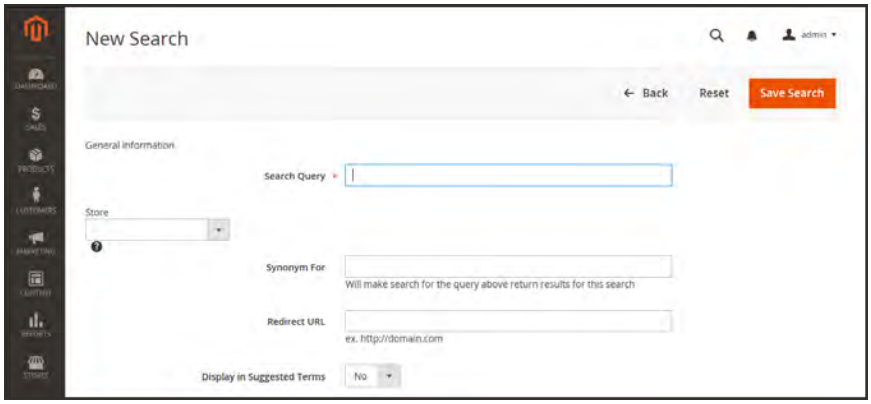
As you learn new words that people use to search for products in your catalog, you can add them to your search terms list to direct people to the most closely matching products in your catalog.



Search Terms

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:



General Information

a. In the General Information section, 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. If the term is a synonym for another search term, enter the other term in the **Synonym For** field. Any search for the synonym is automatically redirected to the page for the other term.

d. 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.

e. 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. On the Admin menu, select **Catalog > Search Terms**.
2. Click the row of any record to open the search term in edit mode.
3. Make the necessary changes.
4. When complete, tap **Save Search**.

To delete a search term:

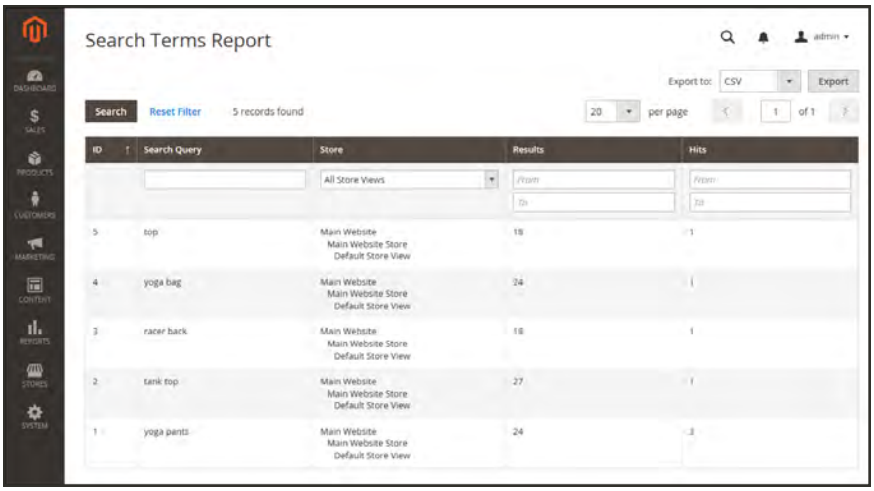
1. In the list, mark the checkbox of the term to be deleted.
2. In the upper-left corner of the list, set **Actions** to "Delete."
3. When complete, tap **Submit**.

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

CHAPTER 39:

SEO Best Practices

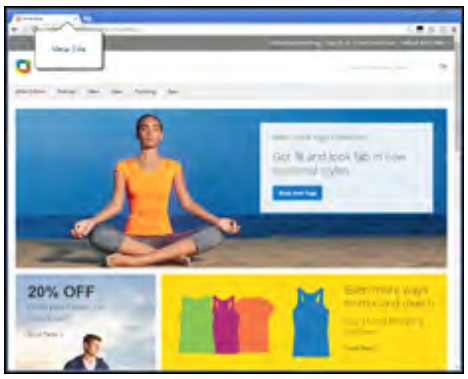
Search engine optimization is the practice of fine-tuning the content and presentation of a site to improve the way the pages are indexed by search engines. Magento Enterprise 2.0 includes a number of features to support your ongoing SEO effort.

Magento eBook

See the latest Magento eBooks to gain access to expert insight and online business resources to help develop and improve your store.

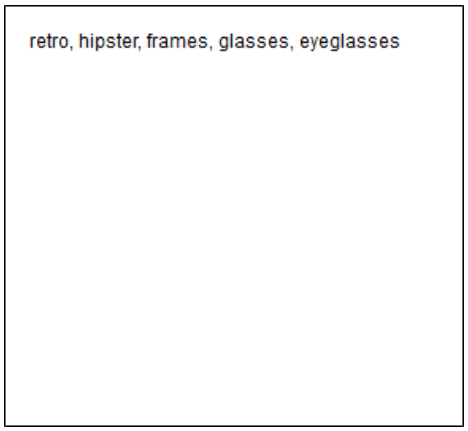
Meta Data

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.



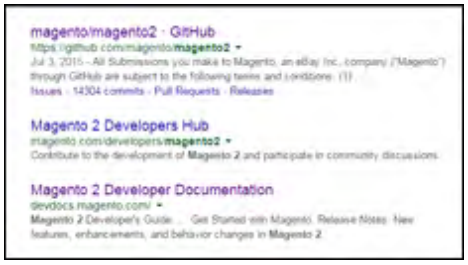
Meta Title

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 70 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

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/furniture/living-room/microfiber-sofa-sleeper

http://mystore.com/microfiber-sofa-sleeper
```

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/furniture/living-room/microfiber-sofa-sleeper
```

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.

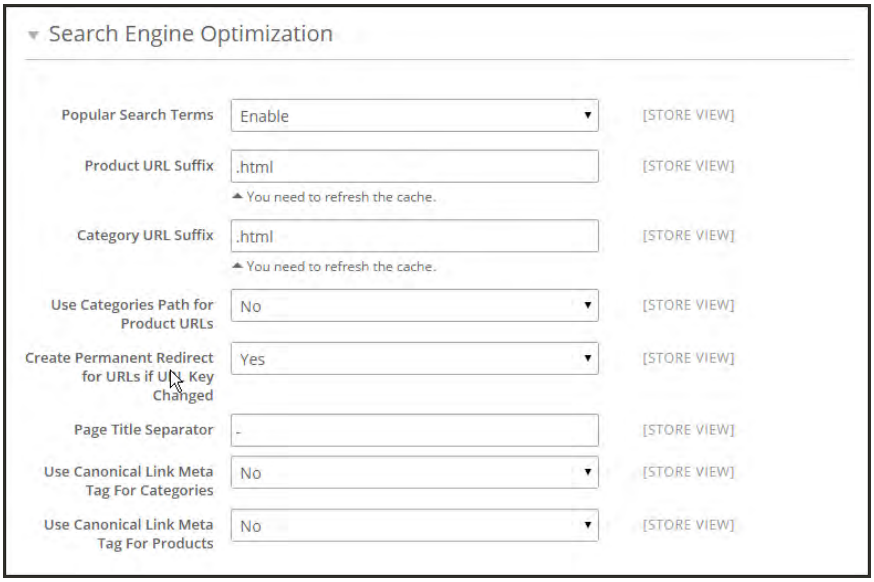
```
http://mystore.com/microfiber-sofa-sleeper
```

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 microfiber-sofa-sleeper and is assigned to the Furniture > Living-Room 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**.
1. In the panel on the left under **Catalog**, choose **Catalog.**
2. Expand the **Search Engine Optimizations** section.



Search Engine Optimizations

3. If want search engines to index only pages that have a 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.”
4. If you want search engines to index only product pages, 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.”
5. When complete, tap **Save Config** .

Using a Sitemap

A sitemap improves the way your store is indexed by their search engine, and is specifically designed to find pages that might otherwise be overlooked by web crawlers. A sitemap can be configured to index all pages, and even images.

When enabled, Magento creates a file called sitemap.xml that is saved to the root directory of your installation. The configuration lets you set the frequency of the updates, and the priority for each type of content. Your sitemap should be updated as frequently as the content on your site changes, which might be daily, weekly, or monthly.

While your site is in development, you might include instructions in the robots.txt file for webcrowlers to avoid indexing the site. Then before the launch, you can change the instructions to allow the site to be indexed.

Process Overview:

Step 1: Configure and Enable the Sitemap

Step 2: Configure and Enable robots.txt (Optoinal)

Step 3: Submit Your Sitemap to Search Engines

Step 4: Restore the Previous Robot Instructions (Optional)

Step 1: Configure and Enable the Sitemap

Complete the XML Sitemap configuration to determine what is included, and how frequently the sitemap is updated.

Step 2: Configure and Enable robots.txt (Optional)

Complete the Search Engine Robots configuration with instructions that direct search engines to crawl the parts of your site that you want to be indexed.

Step 3: Submit Your Sitemap to Search Engines

You can submit your sitemap to different search engines by providing them a link to the sitemap.xml file in the root of your Magento installation. For more information, see the search engine instructions. Here are links to instructions for the two top search engines:

- Google
- Microsoft Bing

Step 4: Restore Previous Robot Instructions (Optional)

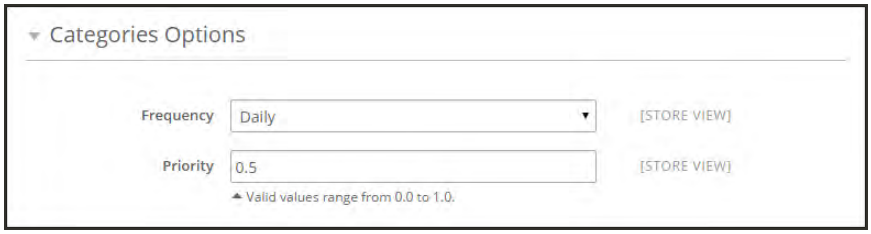
If you changed your robots.txt file to add or remove restrictions, you can now restore either the original, or default restrictions.

Configuring the Sitemap

Your sitemap should be updated as frequently as the content on your site changes, which could be on a daily, weekly, or monthly basis. The configuration lets you set the frequency and priority for each type of content.

Step 1: Set the Frequency and Priority of Content Updates

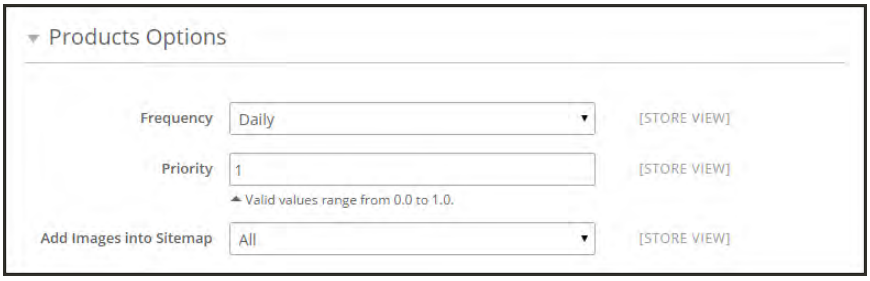
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **XML Sitemap**.
3. Expand the **Categories Options** section. Then, do the following:
   a. Set **Frequency** to one of the following:
      - Always
      - Hourly
      - Daily
      - Weekly
      - Monthly
      - Yearly
      - Never
   b. In the **Priority** field, enter a value between 0.0 and 1.0. Zero has the lowest priority.



Categories Options

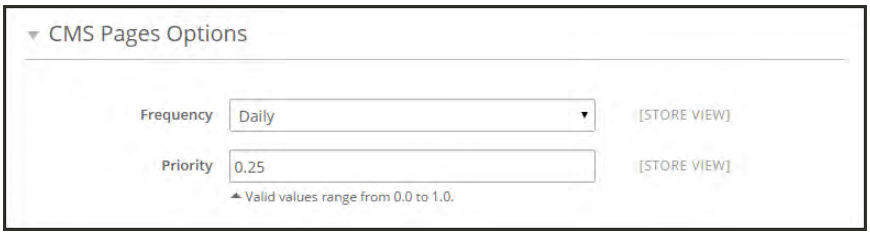
4. Click to expand the **Products Options** section. Then, complete the **Frequency** and **Priority** settings as needed.
5. To determine the extent that images are included in the sitemap, set **Add Images into Sitemap** to one of the following:

- None
- Base Only
- All



Products Options

6. Click to expand the **CMS Pages Options** section. Then, complete the **Frequency** and **Priority** settings as needed.

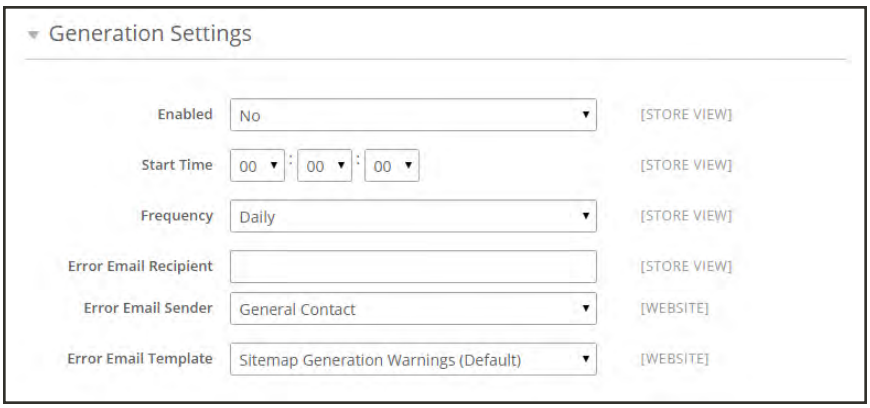


CMS Pages Options

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

Step 2: Complete the Generation Settings

8. Expand the **Generation Settings** section.

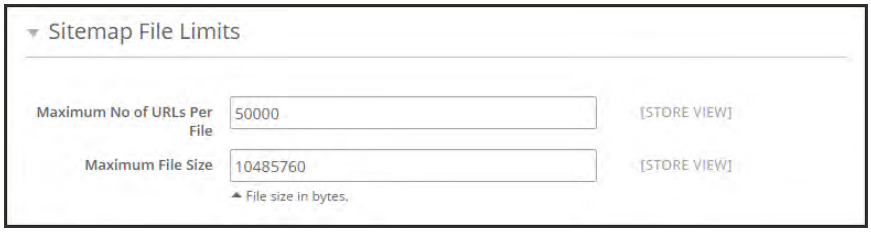


Generation Settings

9. To generate a sitemap, set **Enabled** to "Yes." Then, do the following:
   a. Set **Start Time** to the hour, minute and second that you want the sitemap to be updated.
   b. Set **Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthly
   c. In the **Error Email Recipient** field, enter the email address of the person who is to receive notification if an error occurs during a sitemap update.
   d. Set **Error Email Sender** to the store contact who appears as the sender of the error notification.
   e. Set **Error Email Template** to the template used for the error notification.

Step 3: Set the Sitemap File Limits

1. Expand the **Sitemap File Limits** section. Then, do the following:
   a. In the **Maximum No of URLs per File** field, enter the maximum number of URLs that can be included in the sitemap. By default, the limit is 50,000.
   b. In the **Maximum File Size** field, enter the largest size in bytes that is allocated for the sitemap. The default size is 10,485,760 bytes.



Sitemap File Limits

Step 4: Set the Search Engine Submission Settings

1. Expand the **Search Engine Submission Settings** section. Then, do the following:

   a. 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

2. 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.

Search Engine Robots

To configure robots.txt:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand the **Search Engine Robots** section. Then, do the following:
   a. Set **Default Robots** to one of the following:

INDEX, FOLLOW	Instructs web crawlers to index the site and to check back later for changes.
NOINDEX, FOLLOW	Instructs web crawlers to avoid indexing the site, but to check back later or changes.
INDEX, NOFOLLOW	Instructs web crawlers to index the site once, but to not check back later for changes.
NOINDEX, NOFOLLOW	Instructs web crawlers to avoid indexing the site, and to not check back later for changes.

   b. If needed, enter custom instructions into the **Edit Custom instruction of robots.txt file** box: For example, while a site is in development, you might want to disallow access to all folders.
   c. To restore the default instructions, tap **Reset to Default**.

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

Examples of Custom Instructions

Allows Full Access

```
User-agent:*
Disallow:
```

Disallows Access to All Folders

```
User-agent:*
Disallow: /
```

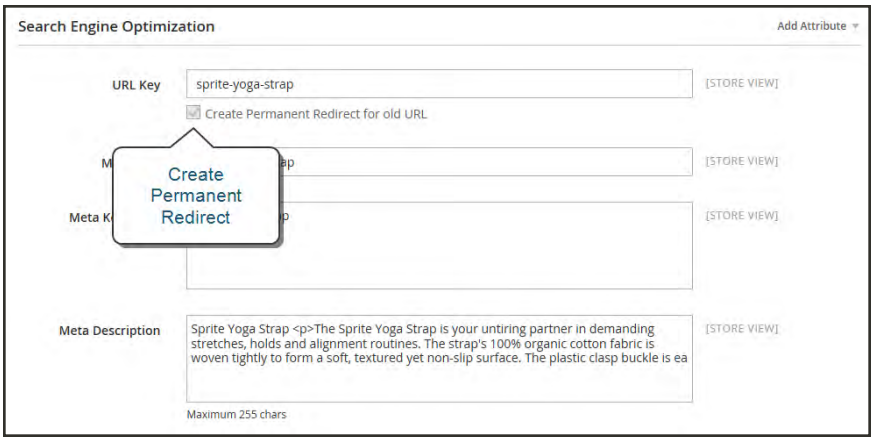
Default Instructions

```
Disallow: /lib/

Disallow: /*.php$

Disallow: /pkginfo/

Disallow: /report/

Disallow: /var/

Disallow: /catalog/

Disallow: /customer/

Disallow: /sendfriend/

Disallow: /review/

Disallow: /*SID=
```

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.



Create Permanent Redirect for Old URL

URL Rewrite Configuration

URL rewrites make it possible to make existing URLs more “search engine friendly” and also easier for humans to read. Enabling Web Server Apache Rewrites is part of the initial Magento setup. Magento routinely uses URL rewrites to remove the file name “index.php” that normally appears in the URL just after the root folder. When Web Server Rewrites are enabled, the system rewrites each URL to omit “index.php.” The rewrite removes words that convey nothing of value to search engines or customers, and has no impact on performance or site rank.

URL without Web Server Rewrite

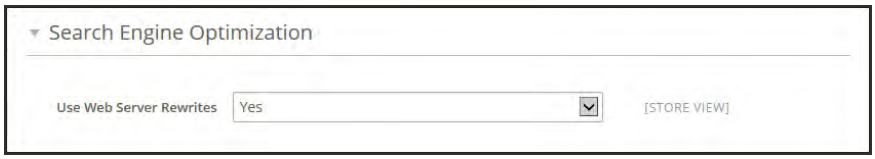
```
http://www.yourdomain.com/magento/index.php/storeview/url-identifier
```

URL with Web Server Rewrite

```
http://www.yourdomain.com/magento/storeview/url-identifier
```

To enable URL rewrites:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
1. In the panel on the left under **General**, choose **Web**.
2. Expand the **Search Engine Optimization** section.

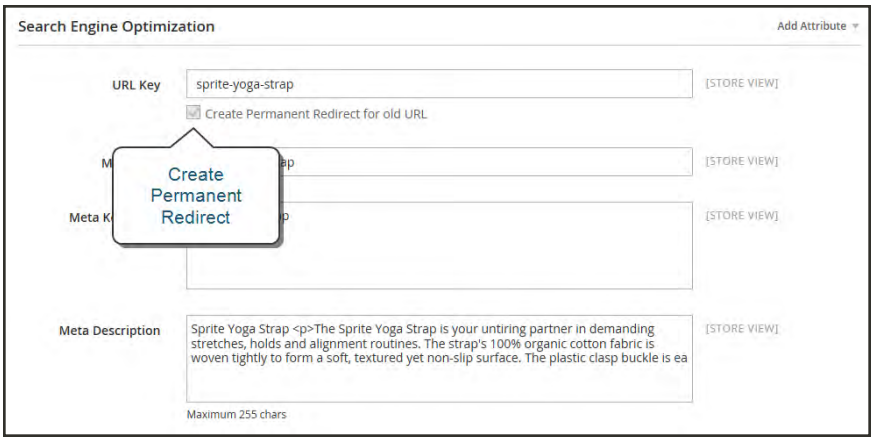


Search Engine Optimization

3. Set **Use Web Server Rewrites** to “Yes.”
4. When complete, tap **Save Config**.

Automatic Product Redirects

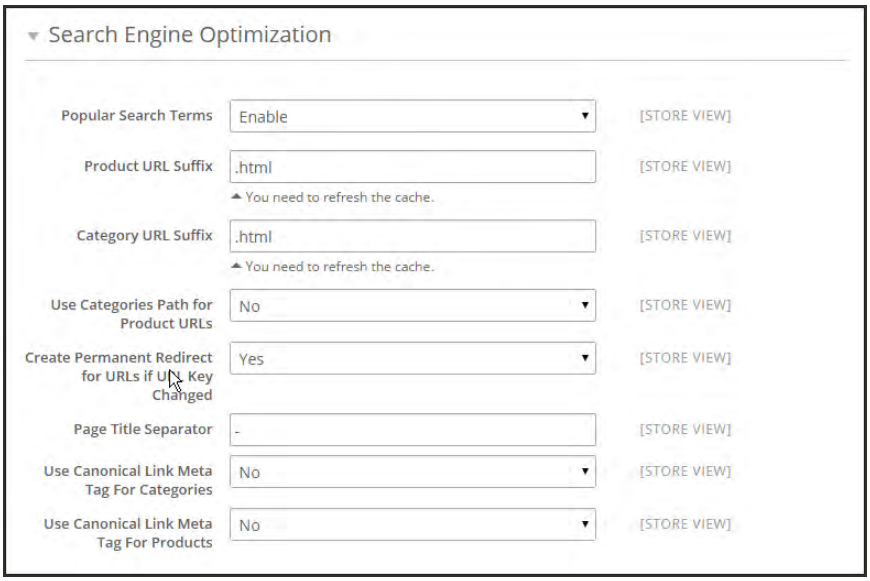
Your store can be configured to automatically generate a permanent redirect whenever the URL key of a product changes. In the Search Engine Optimization section of the product record, the checkbox below the URL key indicates if permanent redirects are enabled for your catalog. If your store is already configured to automatically redirect catalog URLs, making a redirect is as easy as updating the URL key.



Create Permanent Redirect for Old URL

To set up automatic redirects:

1. On the Admin sidebar, tap Stores. Then under Settings, choose **Configuration**.
1. In the panel on the left under **Catalog**, select **Catalog**.
2. Expand the **Search Engine Optimization** section.
3. Set **Create Permanent Redirect for URLs if URL Key Changed** to "Yes."
4. When complete, tap **Save Config**.



Search Engine Optimization

To automatically redirect catalog 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. In the panel on the left, choose **Search Engine Optimization**.
4. 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.
5. When complete,tap **Save**.
6. When prompted to refresh the cache and index, follow the links in the messages that appear at the top of the workspace. The permanent redirect is now in effect for the product and any associated category URLs.
7. To view the redirect records, do the following:
8. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**. The most recent permanent redirects appear at the top of the list.

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

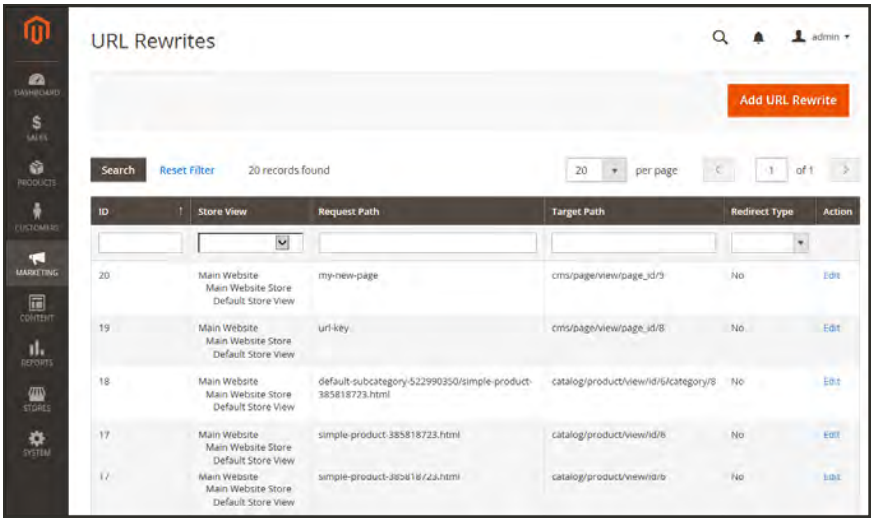
```
http://www.example.com/peripherals/keyboard.html
```

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
```

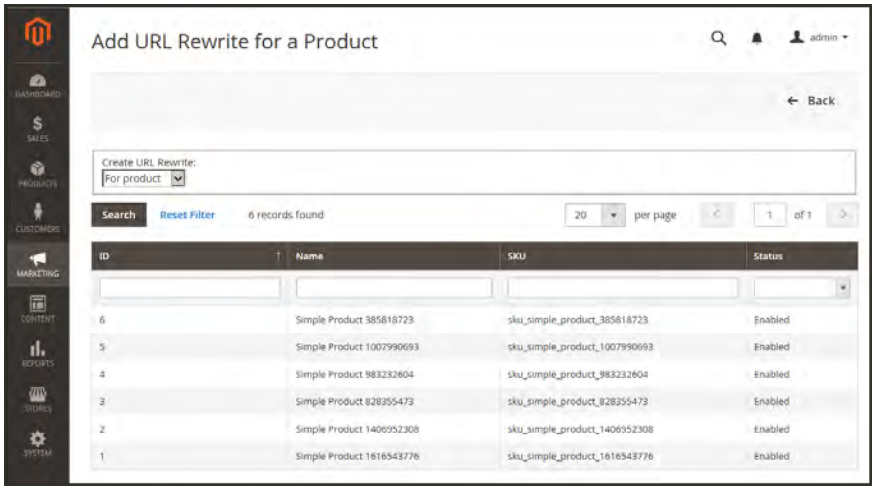


URL Rewrites

Product Rewrites

Before you begin, you should know exactly what you want the redirect to accomplish. To prevent mistakes, it might help to write down the paths as “from” and “to.”

From:	The Target Path displays the internal URL that is used by the system, with the product ID. It is entered automatically, and grayed out.
To:	Although the Request Path initially displays the current URL, it represents the path that you are requesting.



Add URL Rewrite for Product

Process Overview:

Step 2: Create the Rewrite

Step 3: Refresh the Index

Step 4: Test the Result

Step 1: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **Search & SEO**, choose **URL Rewrites**.
2. In the upper-right corner, tap **Add URL Rewrite**.
3. Set **Create URL Rewrite** to “For product.”
4. In the grid, find the product to be redirected. Then, open the record in edit mode.
5. Below the category tree, tap **Skip Category Selection**.

In the URL Rewrite Information, the current product URL appears as the Request Path. The Target Path contains the internal URL that is used by the system. It it grayed out and cannot be changed.

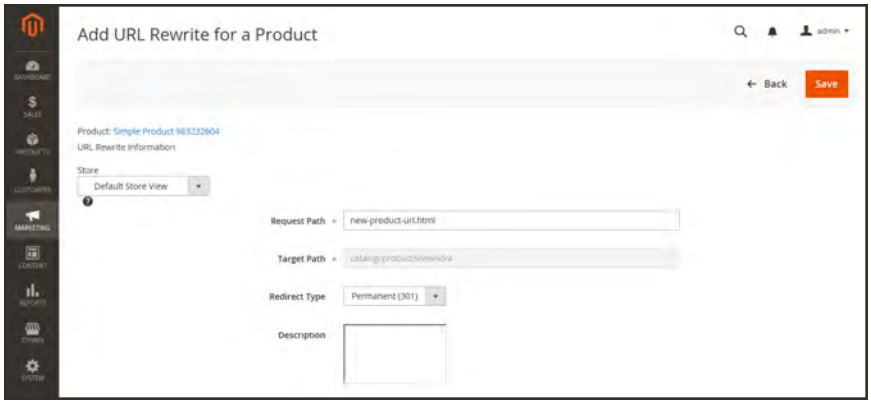
a. If you have multiple store views, set **Store** to the view where the rewrite applies.

b. In the **Request Path** field, enter the new URL key and suffix, if applicable, for the product.

c. Set **Redirect** to one of the following:

- Temporary (302)
- Permanent (301)

d. For your own reference, enter a brief **Description** of the rewrite.



URL Rewrite Information

6. When complete, tap **Save**.

Your new product rewrite now appears at the top of the list.

Step 2: Refresh the Index

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Select the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data.” Then, tap **Submit**.

Step 3: Test the Result

Test the rewrite from your store to make sure that it works correctly.

Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	Indicates the type of rewrite to be made. The type cannot be changed after the rewrite is created. Options: For Category For Product Custom

Request Path	The path where the product is to be redirected. Depending on your configuration, the Request Path might include the .html suffix and category. A Request Path must be unique, and cannot be in use by another redirect. If you have made several attempts to redirect the same page, delete any unsuccessful redirects and refresh the cache. For example:
	`brandname`
	`brand/brandname`
	`catalog/category/view/id/56`
	`private-sale-shoes/prima-pump.html`
	`brand/brandname.html`

Target Path	The internal path used by the system that points to the product. To avoid getting a 404 "Page Not Found" error, the target path must exactly match what the system expects to find.
Redirect	Indicates whether the rewrite is temporary or permanent. Options : No — No redirect is specified. Temporary (302) — Indicates to search engines that the rewrite is for a limited time. Search engines do not preserve page rank information for temporary rewrites. In the URL Rewrite grid, temporary redirects are identified by the letter “R” in the Options column. Permanent (301) — Indicates to search engines that the rewrite is permanent. Search engines generally preserve page rank information for permanent rewrites.

Field Descriptions (cont.)

FIELD	DESCRIPTION
	In the URL Rewrite grid, permanent redirects are indentified by the letters "RP" in the Options column.
Description	Describes the purpose of the rewrite. This field is for reference and is not visible to customers.

Category Rewrite

If a category changes, or no longer exists, you can use a category rewrite to redirect links that point to the previous category to another URL.

Stores that are configured to include categories in the URL key have multiple URLs that point to the same product. To manage the multiple paths for SEO, see: Canonical Meta Tag.

Process Overview:

Step 1: Create the Rewrite

Step 2: Refresh the Index

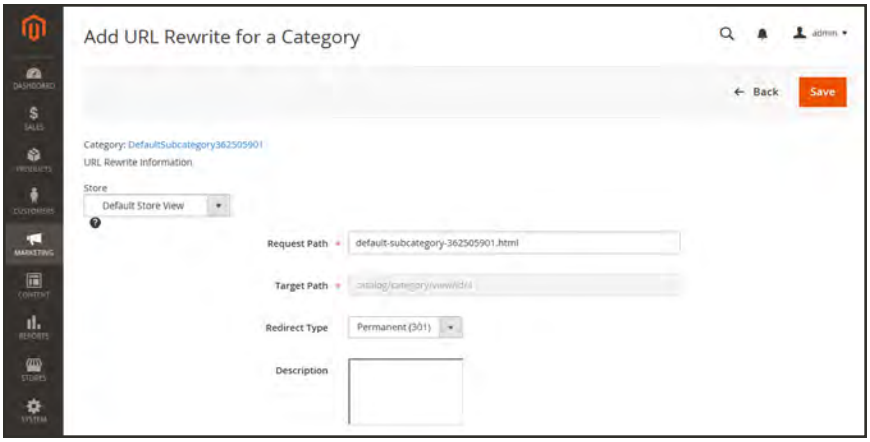
Step 3: Test the Result

Step 1: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. In the upper-right corner, tap **Add URL Rewrite**.
3. Set **Create URL Rewrite** to "For category." Then in the category tree, choose the category that is to be redirected.

URL Rewrite for Category

4. 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 to be redirected.
   c. Set **Redirect**to one of the following:
      - Temporary (302)
      - Permanent (301)
   d. For your own reference, enter a brief description of the rewrite.



Select Category

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

   Your new category rewrite now appears at the top of the list of rewrites.

6. Test the rewrite from your store, to make sure that it works correctly.

Step 2: Refresh the Index

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Mark the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data,” and tap **Submit**.

Step 3: Test the Result

Test the redirect from your store, to make sure that it works correctly. Make sure that the URL you test goes directly to the intended category, rather than to a subcategory. For example:

```
http://yourstore.com/catalog/category/view/id/56

http://yourstore.com/catalog/category/view/s/my-category/id/56/
```

CMS Page Rewrite

You can redirect the URLs of content pages, as well as other pages. For example, if you change the URL key of the privacy policy from `privacy-policy-cookie-restriction-mode` to `privacy-policy`, the link in the cookie restriction mode returns "404 - Page Not Found." To redirect traffic to the new URL key, create a custom rewrite with the following settings:

Request Path:	`privacy-policy-cookie-restriction-mode`
Target Path:	`privacy-policy`
Redirect:	Permanent (301)

Process Overview:

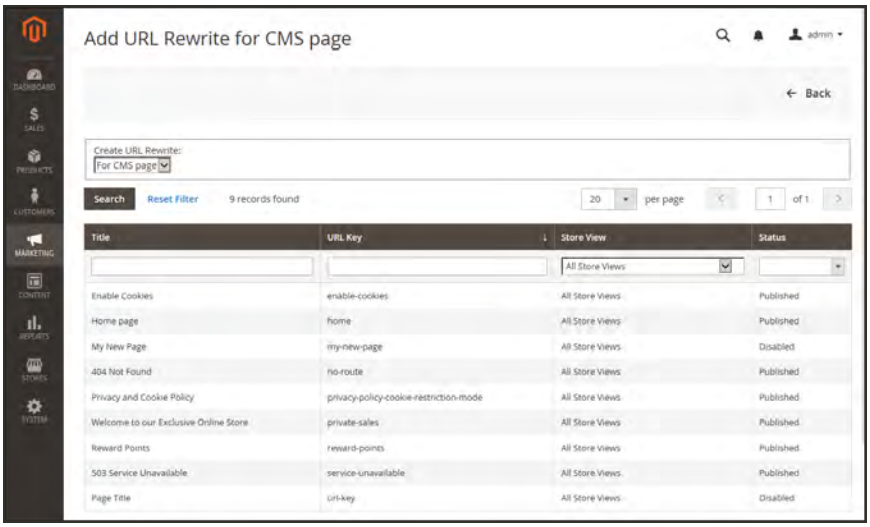
Step 1: Create the Rewrite

Step 2: Refresh the Index

Step 3: Test the Result

Step 1: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. In the upper-right corner, tap **Add URL Rewrite**.
3. Set **Create URL Rewrite** to "for CMS page."
4. Find the page that you want to redirect in the grid, and open the record.



Custom URL Rewrite

5. Under URL Rewrite Information, do the following:

   a. If you have multiple store views, select the **Store** where the rewrite applies.

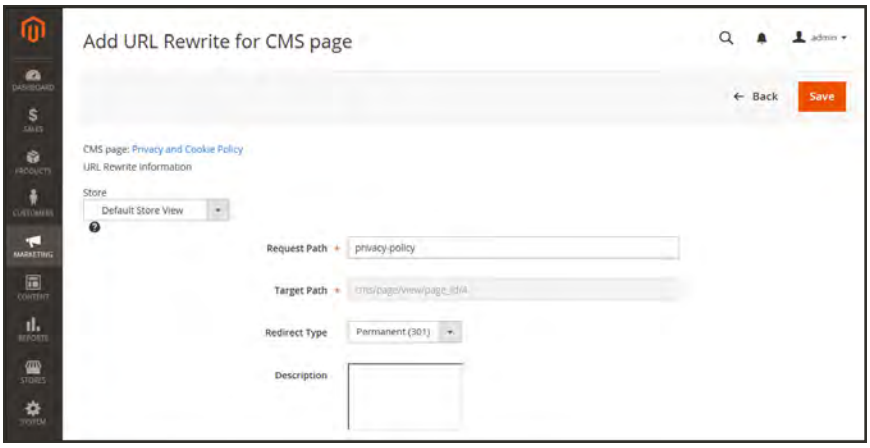
   b. In the **Request Path** field, enter the URL key, of the CMS page to be redirected.

      - To redirect to another CMS page in your store, enter the relative path, without a leading forward slash.
      - To redirect to a page on a different site, enter the fully qualified URL of the destination.

   c. Set **Redirect**to one of the following:

      - Temporary (302)
      - Permanent (301)

   d. For your own reference, enter a brief description of the rewrite.



URL Rewrite Information

6. When complete, tap **Save**.

   The new rewrite appears in the grid at the top of the list.

Step 2: Refresh the Index

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Mark the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to "Reindex Data," and tap **Submit**.

Step 3: Test the Result

Test the rewrite from your store to make sure that it works correctly.

CHAPTER 40:

Google Tools

Your store includes a number of tools to help optimize your content, analyze your traffic, and connect your catalog to shopping aggregators and marketplaces.

Magento eBook

Understand the fundamentals of search engine optimization, and maximize your click-through rates from organic listings. Get the eBook now!

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. Your store can be configured to use either a Google Universal Analytics or Google Tag Manager account.

Process Overview:

Step 1: Sign Up for Google Universal Analytics

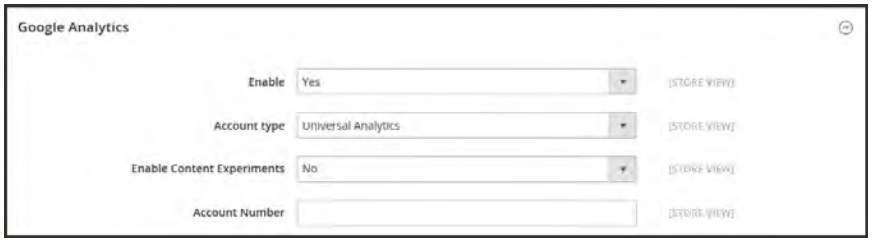
Step 2: Complete the Magento Configuration

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. Set **Account type** to "Universal Analytics."
   c. If you want to conduct A/B testing and other performance tests on your content, set **Content Experiments** to "Yes."
   d. Enter your Universal Analytics **Account Number**.



Google Universal Analytics Account Configuration

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

Google Tag Manager

Google Tag Manager helps you manage the many tags, or snippets of code, that are related to your marketing campaign events. Google Tag Manager gives you the ability to add tracking tags to your site to measure the audience, or to personalize, retarget, or conduct search engine marketing initiatives.

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.

The following instructions walk you through the process of setting up a Google Tag Manager account, configuring your Magento store, and creating a tag.

Process Overview:

Step 1: Set Up a Google Tag Manager Account

Step 2:Configure Your Store

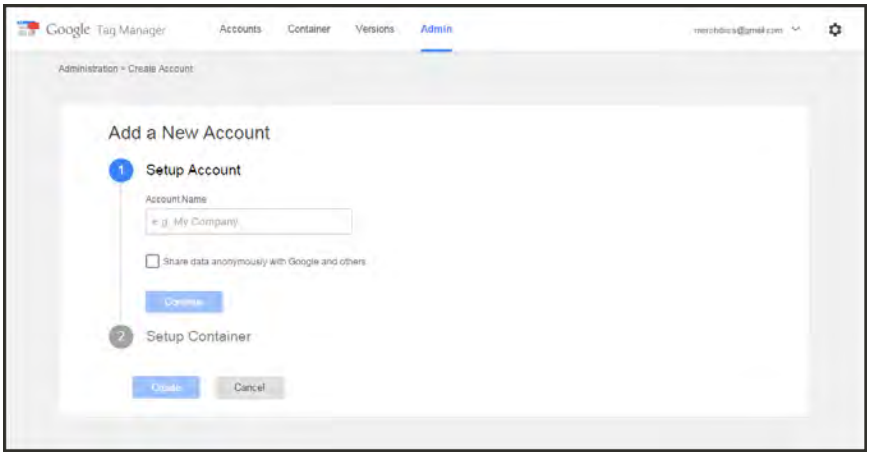
Step 1: Set Up a Google Tag Manager Account

1. Sign in to your Google account. Then, visit Google Tag Manager, and sign up for an account.

   If you have trouble logging in with your browser, either upgrade your browser or use Chrome.

2. Follow the instructions to set up a container.

   The container script that is generated during the setup process is automatically added to the configuration of your store.

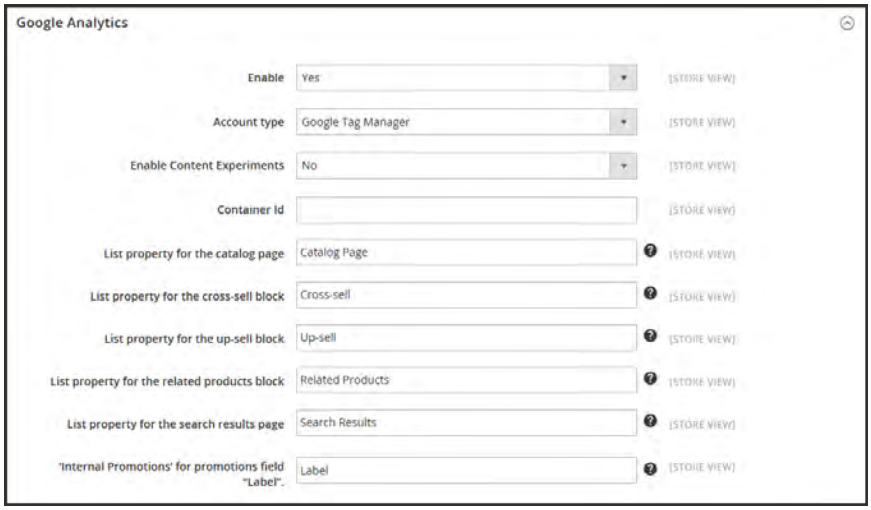


Google Tag Manager Sign Up

Step 2: Configure Your Store

1. Log in to the Admin of your Magento store. 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, and do the following:
   a. Set **Enable** to "Yes."
   b. Set **Account type** to "Google Tag Manager."

      If Google Tag Manager is installed, the **Container Id** appears automatically.
   c. If you are also using Google Analytics to content experiments, set **Enable Content Experiments** to "Yes."



Google Analytics - Tag Manager Configuration

   d. Verify the following values:

PROPERTY	VALUE
List property for the catalog page	Catalog Page
List property for the cross-sell block	Cross-sell
List property for the up-sell block	Up-sell
List property for the related products block	Related Products
List property for the search results page	Search Results
Field label for internal promotions.	Label

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

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable	Store View	Determines if Google Analytics Enhanced Ecommerce can be used to analyze activity in your store. Options include: Yes / No
Account type	Store View	Determines the Google tracking code that is used to monitor store activity and traffic. Options include: Google Analytics Google Tag Manager
Container Id	Store View	If Google Tag manager is already installed and configured for your store, the Container ID appears automatically in this field.
List property for the catalog page	Store View	Identifies the Tag Manager property associated with the catalog page. Default value: Catalog Page
List property for the cross-sell block	Store View	Identifies the Tag Manager property associated with the cross-sell block. Default value:Cross-sell
List property for the up-sell block	Store View	Identifies the Tag Manager property associated with the up-sell block. Default value: Up-sell
List property for the related products block	Store View	Identifies the Tag Manager property associated with the related products block. Default value: Related Products
List property for the search results page	Store View	Identifies the Tag Manager property associated with the search results page. Default value: Search Results
“Internal Promotions” for promotions field “Label”	Store View	Identifies the Tag Manager property associated with the labels for internal promotions. Default value: Label

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.

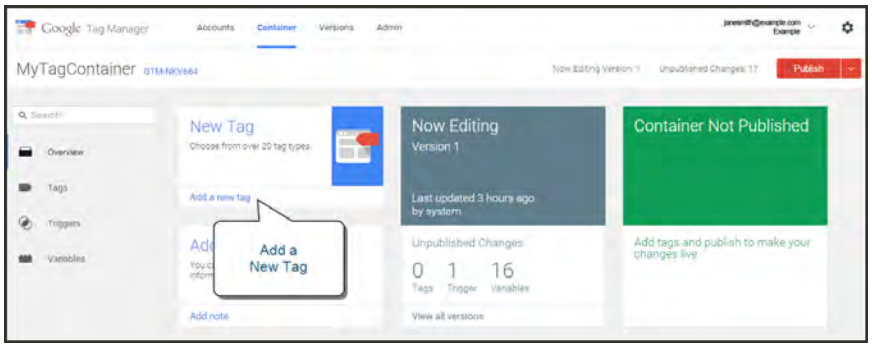
Process Overview:

Step 1: Create a Tag

Step 2: Preview and Publish

Step 1: Create a Tag

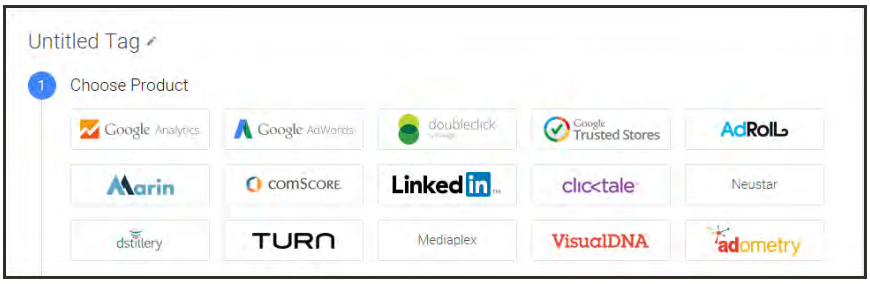
1. Log in to your Google Tag Manager account. Then, click the link for the container that you created for your store.
2. In the **New Tag** box, tap **Add a new tag**.



Google Tag Manager

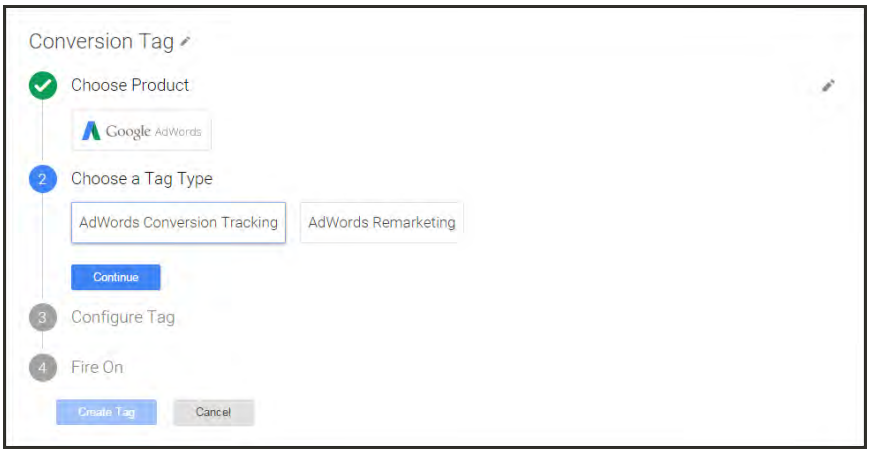
3. You will need the following information from your AdWords account:
   - Conversion ID
   - Conversion Label

   If you need help, visit Google's support site.
4. From the Google Tag Manager dashboard, tap **Google AdWords**. Then, do the following:
   a. Tap the title placeholder, and enter a name for the new tag.
   b. Under **Choose Product**, select **Google Adwords**.

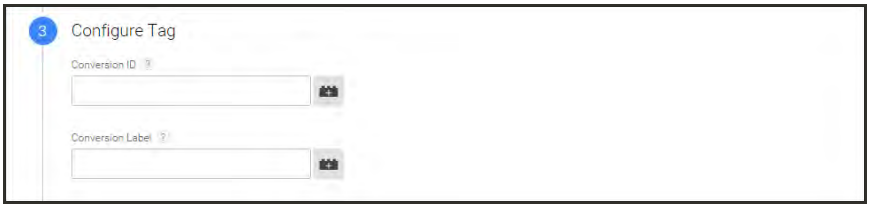


Choose Product

c. Under **Choose a Tag Type**, select **AdWords Conversion Tracking**. Then, tap **Continue**.



5. Enter the **Conversion ID** and **Conversion Label** from your AdWords account. Then, tap **Continue**.



Configure Tag

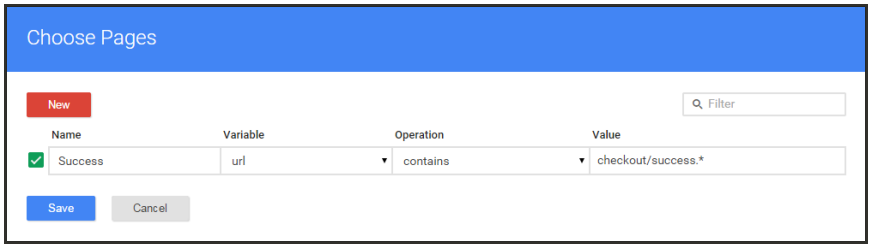
Step 3: Create a Rule

Continuing from the Google Tag Manager dashboard, the next step is to create a rule that fires the tag on the conversion page.

1. Under **Fire On**, tap **Some Pages**.

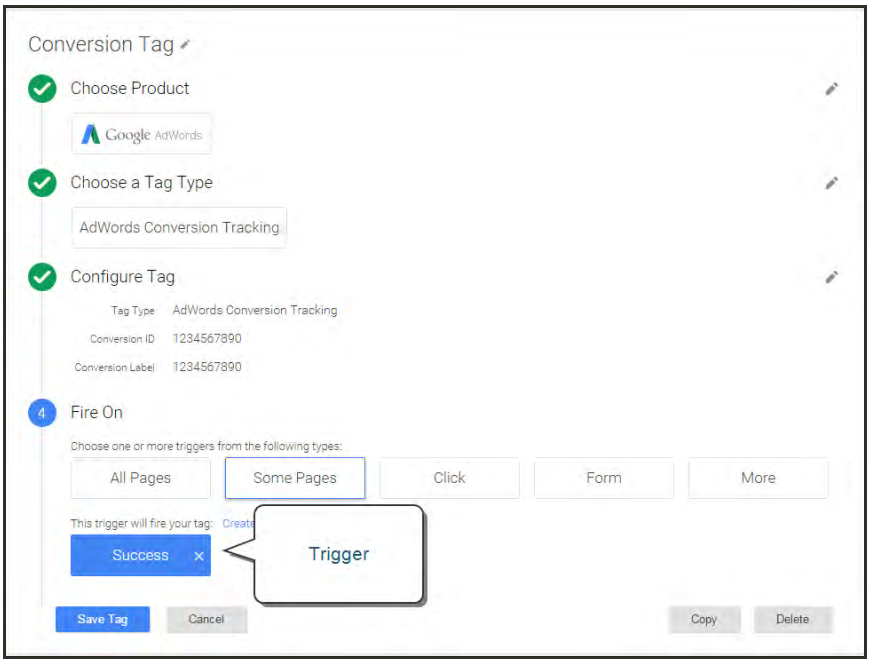
2. In the Choose Pages section, complete the following settings:

Name:	Enter a name for the page description.
Variable:	url
Operation:	contains
Value:	`checkout/success.*`



Conversion Page Location

3. Mark the green checkbox, and tap **Save**. The trigger that you set up appears as a blue button in the Fire On section.
4. When complete, tap **Save Tag**.



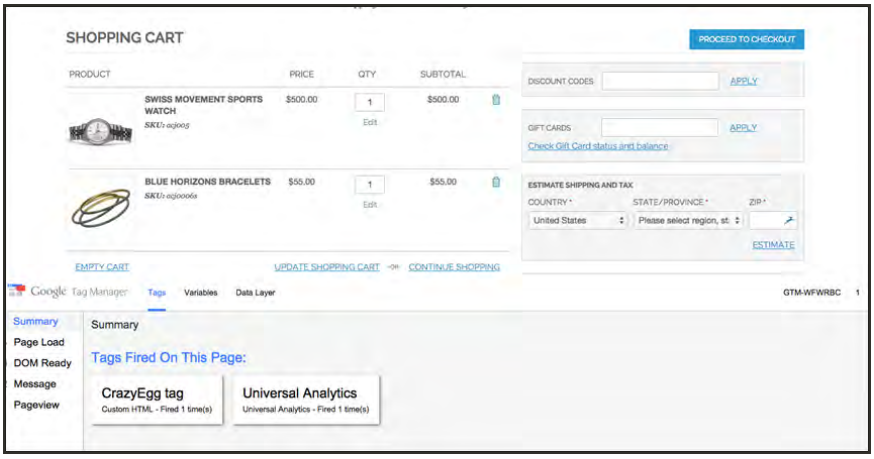
Step 4: Preview and Publish

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.



Tags Fired in Shopping Cart Shown in Debug Mode

Step 1: Sign Up for Google Accounts

1. Sign up for a Google Tag Manager account, and complete the Magento configuration.
2. Sign up for a new Google Universal Analytics account.

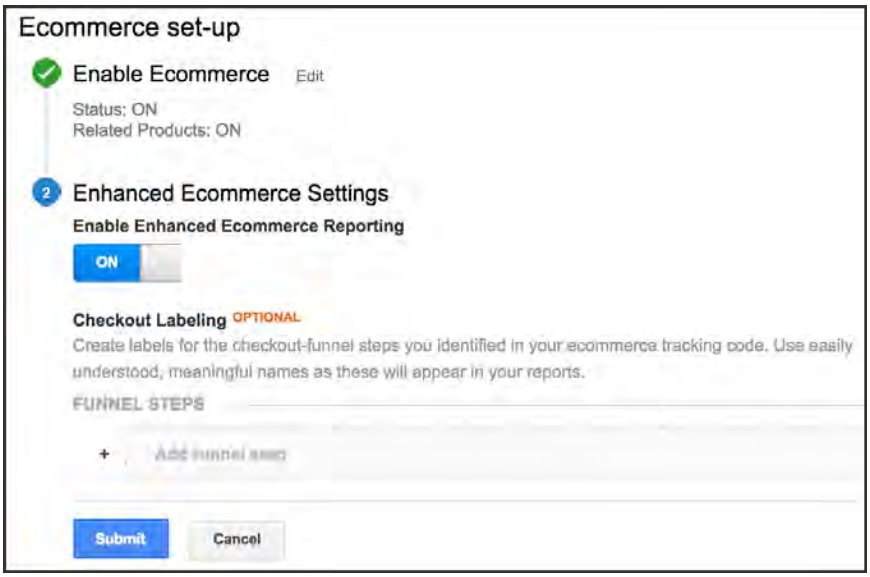
Step 2: Configure Enhanced Ecommerce

1. Sign in to your Google Universal Analytics account.
2. Create a new property for Enhanced Ecommerce analytics with the following settings:

Enhanced Ecommerce Property

SETTING	VALUE
ENABLE ECOMMERCE SETTINGS	
Status	ON
Related Products	ON
ENHANCED ECOMMERCE SETTINGS	
Enable Enhanced Ecommerce Reporting	ON
Checkout Labeling	(not required)

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

NAME	EVENT TYPE	FILTER
`AddToCart`	Custom Event	
`Checkout`	Custom Event	
`Checkout only`	Page View	`Page URL matches RegEx /checkout/.*`
`CheckoutOption`	Custom Event	
`gtm.dom`	Custom Event	
`ProductClick`	Custom Event	
`PromotionClick`	Custom Event	
`RemoveFromCart`	Custom Event	

2. Create the following Universal Analytics tags with the same basic configuration.

Universal Analytics Tags

NAME	TYPE	FIRING TRIGGERS
Add to cart tracking	Universal Analytics	`AddToCart`
Checkout option tracking	Universal Analytics	`CheckoutOption`
Checkout tracking	Universal Analytics	`Checkout`
Pageview tracking	Universal Analytics	`gtm.dom`
Product client tracking	Universal Analytics	`ProductClick`
Promo click tracking	Universal Analytics	`PromotionClick`
Remove from cart tracking	Universal Analytics	`RemoveFromCart`

Basic Tag Configuration

SETTING	VALUE
Product	Google Analytics
Tag Type	Universal Analytics
Tracking ID	UA-XXX (The tracking ID from your Universal Analytics account.)
Enable Enhanced Ecommerce Features	True
Use data layer	True
Use Debug version	True

3. Complete the individual tracking configurations as follows:

   a. Enter the following **Add to Cart** tracking settings:

   ### Add to Cart Configuration

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Add to Cart
Trigger	`AddToCart`

   b. Enter the following **Checkout option** tracking settings:

   ### Checkout Option Configuration

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Checkout Option
Trigger	`CheckoutOption`

   c. Enter the following **PageView** tracking settings:

Page View Configuration

SETTING	VALUE
Track Type	PageView
Trigger	`gtm.dom`

d. Complete the following **Product Click** tracking configuration:

Product Click Configuration

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Product Click
Trigger	`ProductClick`

e. Complete the following **Promotion Click** tracking configuration:

Promotion Click Configuration

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Promotion Click
Trigger	`PromotionClick`

f. Complete the following **Remove from Cart** tracking configuration:

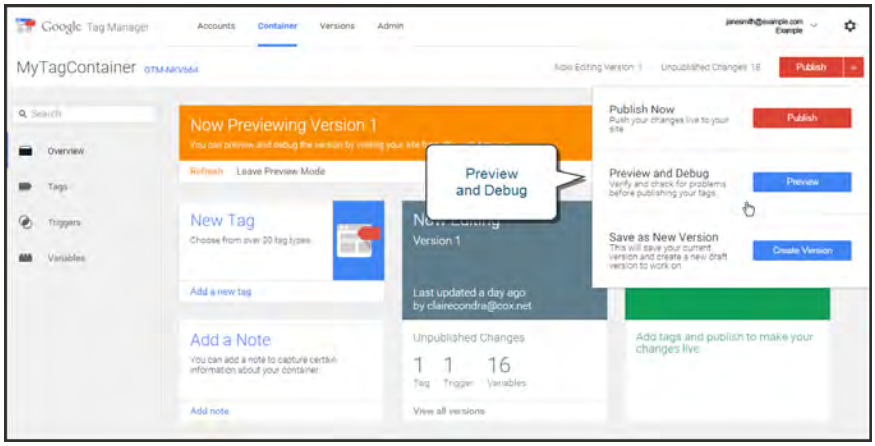
Remove from Cart Configuration

SETTING	VALUE
Track Type	Event
Category	Ecommerce
Action	Remove from Cart
Trigger	`RemoveFromCart`

4. When complete, tap **Preview** and verify that the tags work correctly.
5. When complete, tap **Publish**.

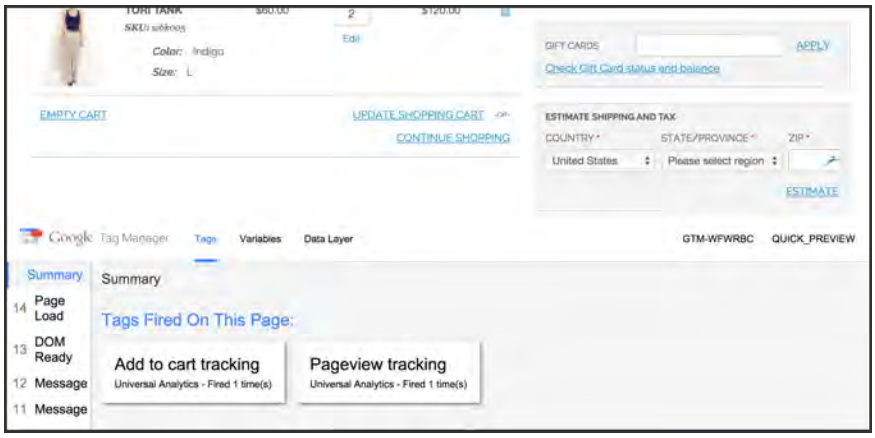
Troubleshooting Tools

Both Google Tag Manager and Universal Analytics have debug modes with a variety of tools that you can use to troubleshoot your integration.



Preview and Debug

Tag Manager's debug preview mode shows tags as they are fired and their associated data layers.

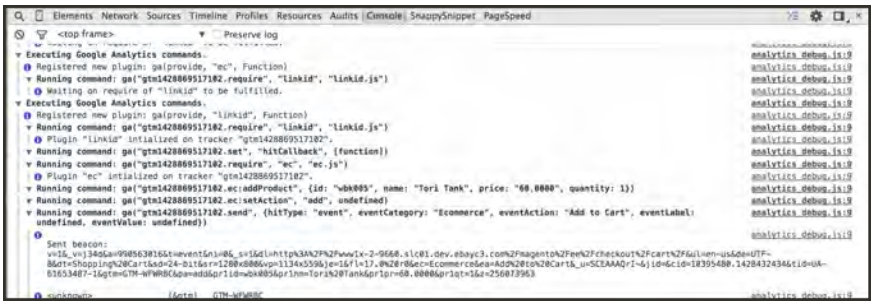


Tags Fired During Checkout

Google Analytics Enhanced Ecommerce makes it possible to send sales data, and information about product impressions and promotions to the data layer, along with any Google Analytics pageview or event. You can use the values in the data layer to measure impressions and analyze customer actions.

Values in Data Layer

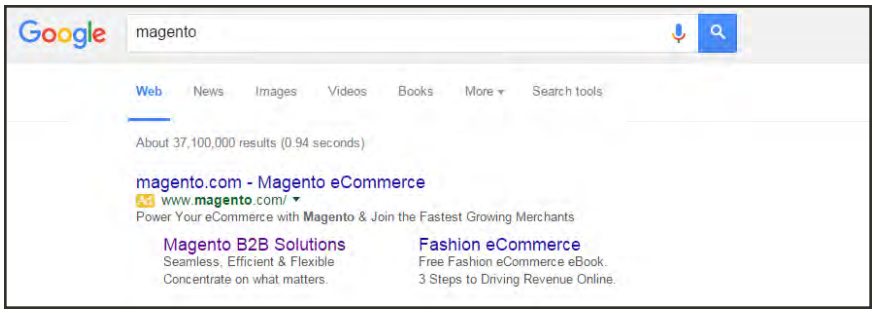
You also can use the JavaScript console in Chrome to see the output of events as it is sent to Google.



Chrome JavaScript Console

Google Adwords

Google Adwords is a service that is used to place ads in Google Search results, with tools to manage the campaigns.



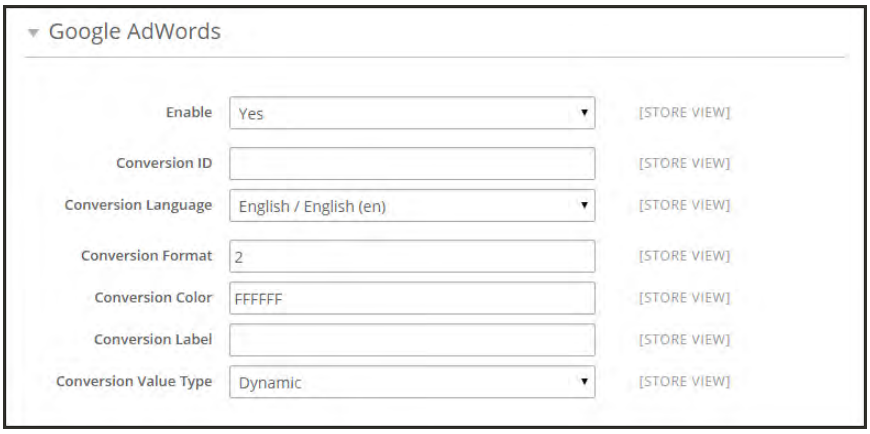
Magento Ad in Google Search Results

Step 1: Sign Up for Google Adwords

Visit Google Adwords, and sign up for an account.

Step 2: Configure Your Store

1. 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 Adwords** section. Then, do the following:



Google Adwords

a. Set **Enable** to "Yes."

b. Enter the **Conversion ID** from your Google Adwords account.

c. Choose the **Conversion Language**.

d. Enter the number for the **Conversion Format** that you want to use.

e. Enter the hexadecimal code for the **Conversion Color** that you want to use to highlight conversions.

f. Enter the text for the **Conversion Label** to identify conversions.

g. Set **Conversion Value Type** ro one of the following:

- Dynamic
- Constant

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

CONTENT

Content Elements

Content elements include pages, blocks, and widgets. Learn to create pages with text, images, and dynamic blocks of content that can be incorporated into your store navigation and linked to other pages.

Design & Theme

Your store's theme can be changed for a season or promotion. Learn about page layouts, how to apply a new theme to your store, and simple design changes that you can make from the Admin.

Content Elements

In this section of the guide, you'll learn to create and manage content pages and blocks, and incorporate banners and widgets.

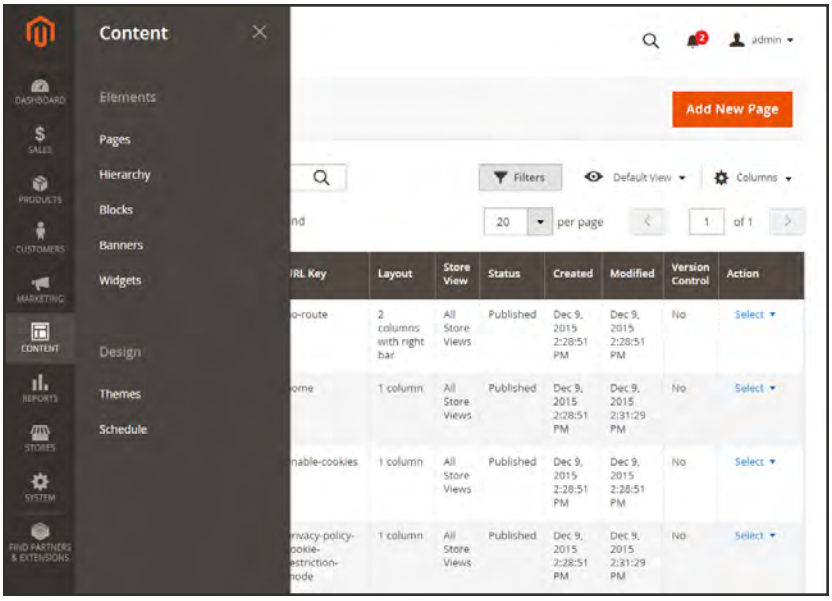
Contents

CHAPTER 41:

Content Menu

The term **content marketing**[1] 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. With quality content, sometimes less is more.



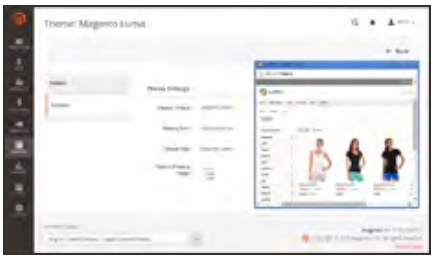
Content Menu

[1]The art of promoting products or services by providing valuable information at no charge.

Menu Options

Elements

Content elements include pages, blocks, banners, and widgets. Learn to create pages with text, images, and dynamic content. Link your content to other pages, and incorporate custom pages into your store navigation.



Design

Learn to manage the visual presentation of your store, apply themes, and schedule design changes.

CHAPTER 42:

Pages

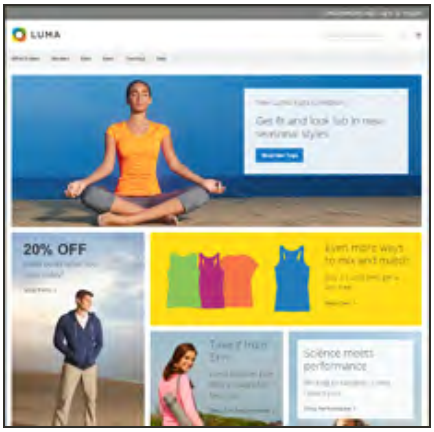
All content can be viewed in terms of its shelf life, just as any product in a store. Did you know that the shelf life of social media content is less than twenty-four hours? The potential shelf life of the content you create can help you decide where to invest your resources.

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. 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

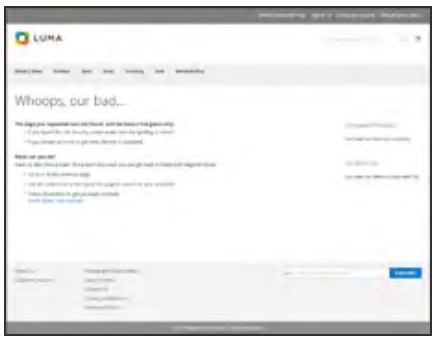
The “Customer Service” page is another node in the page hierarchy. The two headers on the page have content that only becomes visible when the header is clicked.

Reward Points

The Reward Points page should be updated to explain how your reward program works, the value of points earned, and how they can be redeemed.

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.



Page Not Found

The "404 Page Not Found" page is named for the response code that is returned when a page cannot be found. URL redirects reduce the number of times that this page appears. However, for those times when it is necessary, you might as well take advantage of the opportunity to offer some links to products that the customer might find interesting.

Enable Cookies

The "Enable Cookies" page appears when visitors to your site do not have cookies enabled in their browsers. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.

Service Unavailable

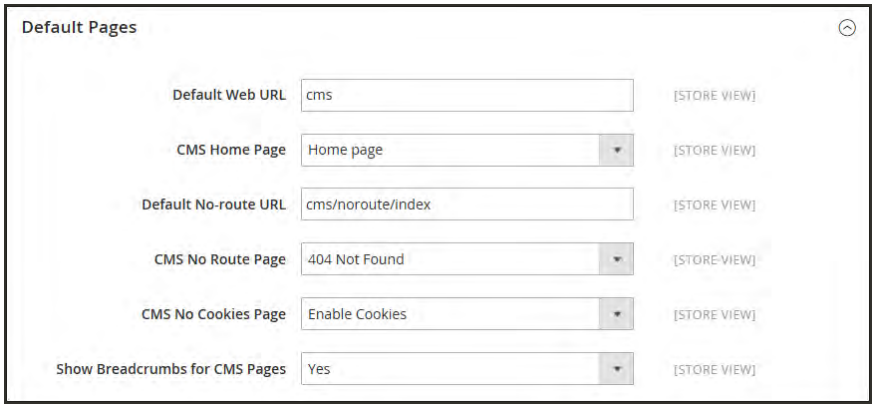
The “503 Service Unavailable" page is named for the response code that is returned when the server is unavailable.

Default Pages

The Default Pages configuration determines the landing page associated with the base URL, and the corresponding home page. It also determines which page appears when a "404 Page Not Found" error occurs, and if a breadcrumb trail appears at the top of content pages.

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:



Default Pages

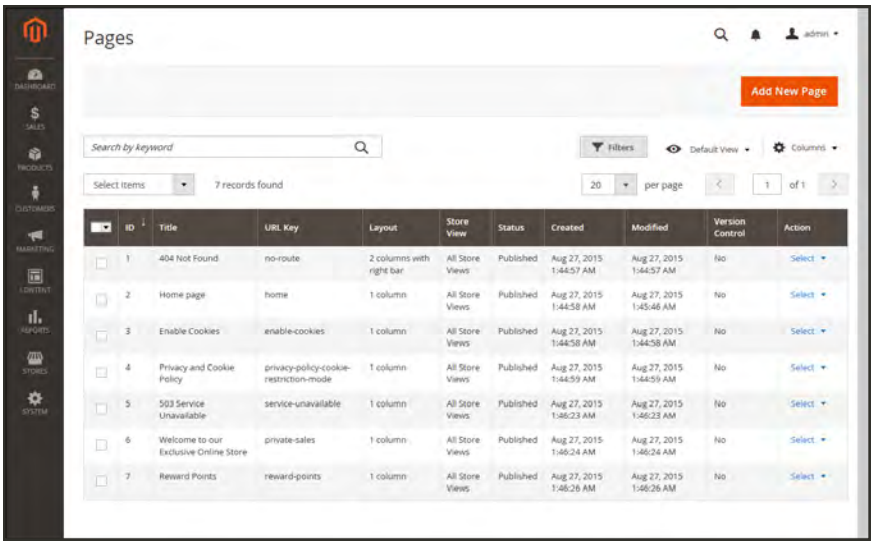
   a. In the **Default Web URL** field, enter the relative path to the folder in the Magento installation that contains the landing page. The default value is "cms."

   > For a specific store view, clear the **Use Default** checkbox next to the Default Web URL field, and any other default fields to be changed.

   b. Set **CMS Home Page** to the CMS page to be used as the home page.
   c. In the **Default No-route URL** field, enter the relative path to the folder in the Magento installation where the page is redirected when a "404 Page Not Found" error occurs. The default value is "cms/index/noRoute."
   d. Set **CMS No Route Page** to the CMS page that appears when a "404 Page Not Found" error occurs.
   e. Set **CMS No Cookies Page** to the CMS page that appears when cookies are disabled in the browser.
   f. If you want a breadcrumb trail to appear at the top of all CMS pages, set **Show Breadcrumbs for CMS Pages** to "Yes."
4. When complete, tap **Save Config**.

Workspace Controls

The Pages workspace includes tools to help you quickly find the pages you need, and commands to perform routine maintenance on individual or multiple pages.



Pages Grid

Workspace Controls

CONTROL	DESCRIPTION
Store View	Sets the scope to a specific view.
Add New Page	Adds a new page.
Search	Initiates a catalog search based on the current filters.
Reset Filter	Restores all filters to a blank state.
Actions	Lists all actions that can be applied to selected items in the list. To apply an action to a page, or to multiple pages, mark the checkbox in the first column of each record that is subject to the action. Options: Delete Change Status Update Attributes

Workspace Controls (cont.)

CONTROL	DESCRIPTION
Select	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 All / Deselect All
Submit	Applies the current action to selected records.
Edit	Opens the record in edit mode. You can accomplish the same thing by clicking anywhere on the row.

Columns

COLUMN	DESCRIPTION
Select	The checkbox in the first column is used to apply the following actions to specific or multiple pages: Delete Disable Enable The header of the Select column can be set to select or deselect all pages.
ID	The ID is an incrementing number that is assigned to each page.
Title	The page title appears at the top of each page.
URL Key	The URL key is similar to a file name, and identifies the page in the URL.
Layout	Determines if the page appears with sidebars to the right or left of the main content area. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Store View	Can be used to associate the page with a specific store view.

Columns (cont.)

COLUMN	DESCRIPTION	
Status	Indicates if the page is currently online or offline. Options: Disabled / Published	
Created	The date the page was created.	
Modified	The data the page was last modified.	
Version Control	Indicates if the page is maintained under version control. Options: Yes / No	
Action	The actions that can be applied to an individual record include:	
	Edit	Opens the page in edit mode.
	Delete	Deletes the page.
	Preview	Displays the page in preview mode.

Page Search

The Search box in the upper-left of the page grid can be used to find specific pages. For a more advanced search, you can filter the search by multiple parameters.

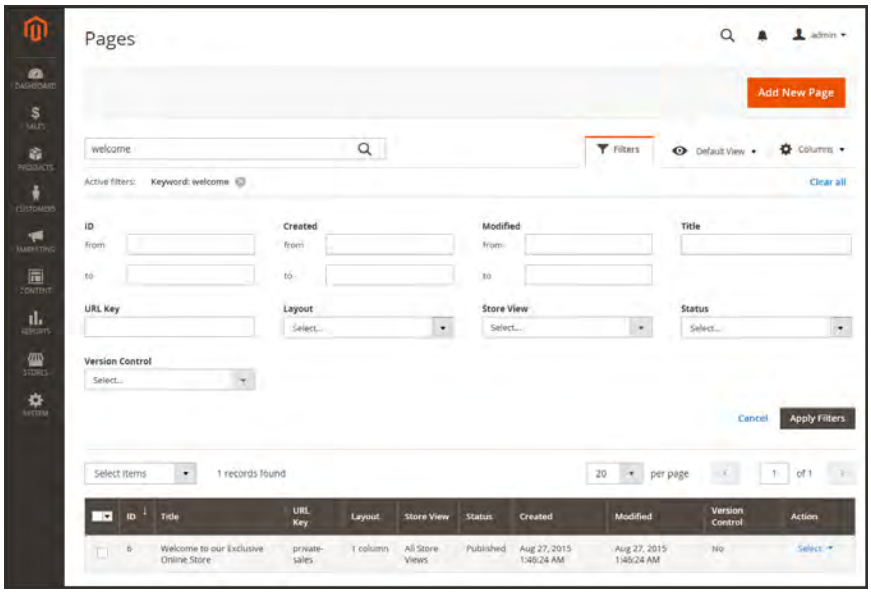
Search Results

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 necessary to describe the page(s) that you want to find.
3. Tap **Apply Filters** to display the results.



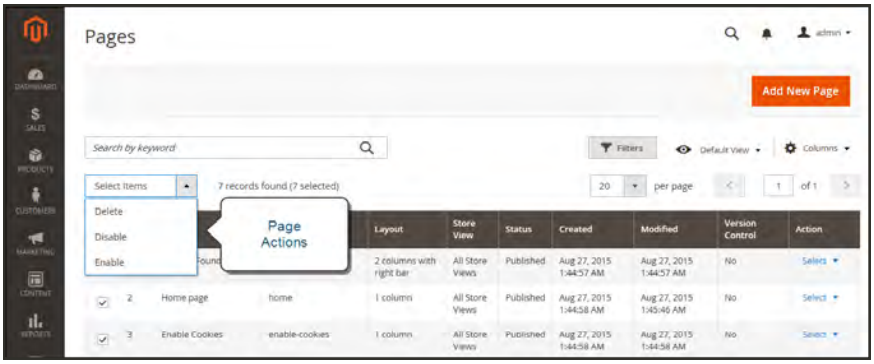
Search Filters

FILTER	DESCRIPTION
ID	Filter the search by page record ID.
URL Key	Filter the search by the URL Key.
Version Control	Filter the search on the basis of version control: Yes / No
Created	Filter the search by the date the page was created.
Layout	Filter the search based on page layout. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Modified	Filter the search based on the date the page was last modified.
Store View	Filter the search based on store view. Options: (All available Store Views)
Title	Filter the search based on the page title.
Status	Filter the search on the page status. Options: Disables / Published
Apply Filters	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

Page Actions

The following actions can be applied to selected pages. To select individual pages, mark the checkbox in the first column. To select or deselect all pages, use the control at the top of the column.

- Delete
- Disable
- Enable

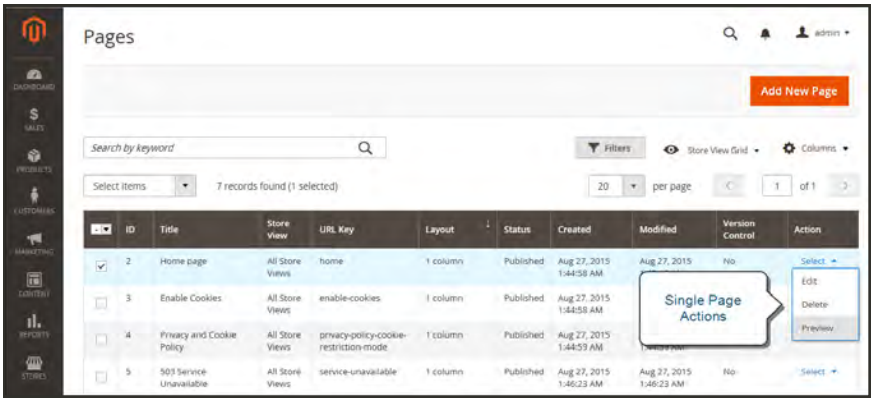


Page Actions

Applying Actions

The Action column on the far right can be used to apply any of the following actions to the individual page:

- Edit
- Delete
- Preview.



Single Page Actions

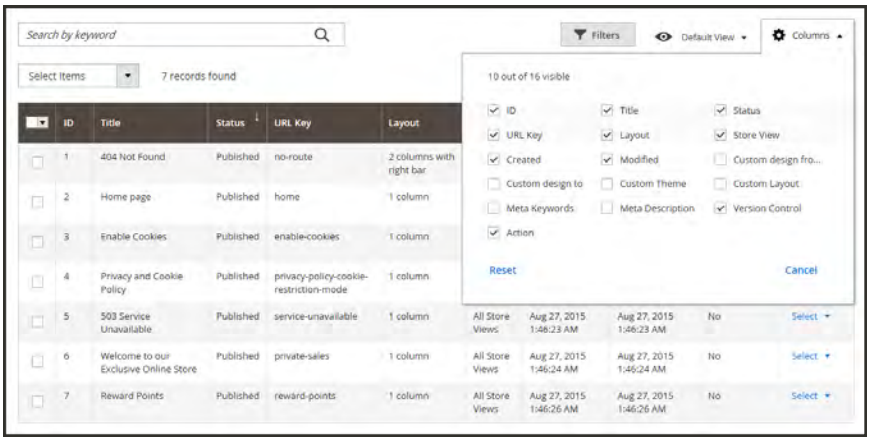
Page Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. To keep the new column arrangement, you can save it as a view.

To change the selection of columns:

In the upper-right corner, tap the **Columns** ⚙ control. Then, do the following:

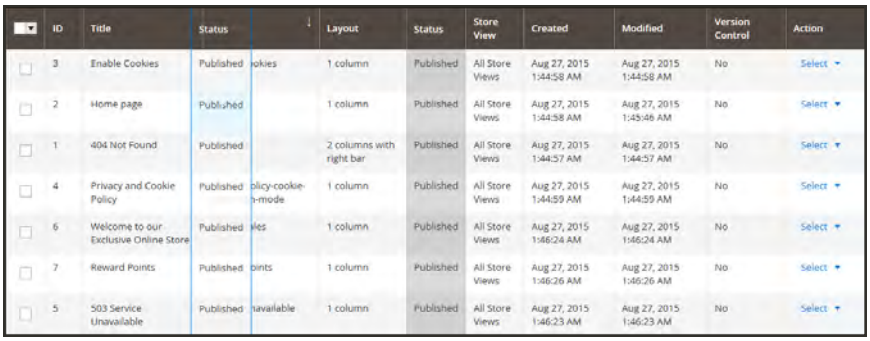
- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.



Page Grid Columns

To move a column:

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



Moving a Column

To save a 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.

Save Current View

To change the view:

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

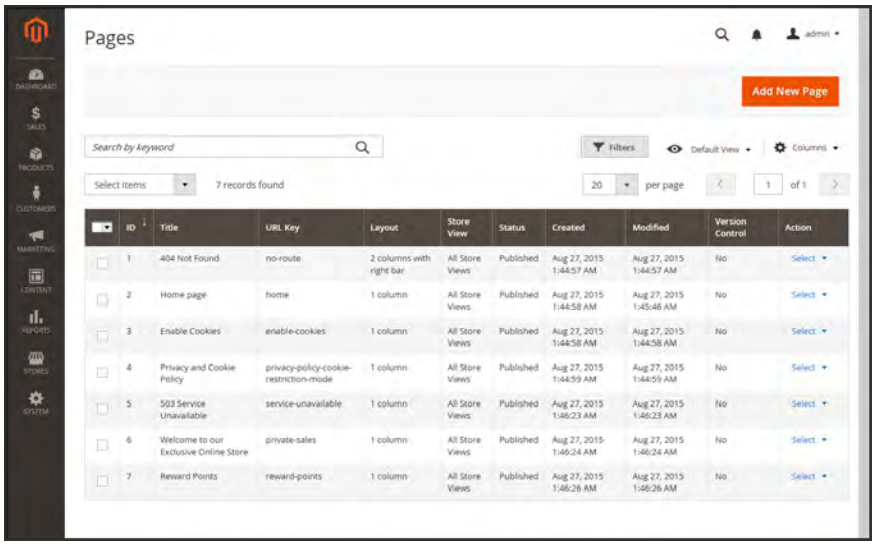
- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** ✎ icon. Then, update the name.

Save Current View

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 frontend apps. 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, composing the meta data, and writing the content.

The following instructions walk you through each step to create a basic page. Some advanced features are skipped over, but covered in other topics. Each is marked as “Advanced,” with a link to learn more.



Pages

Process Overview:

Step 1: Add a New Page

Step 2: Select the Page Layout

Step 3: Complete the Content

Step 4: Complete the Meta Data

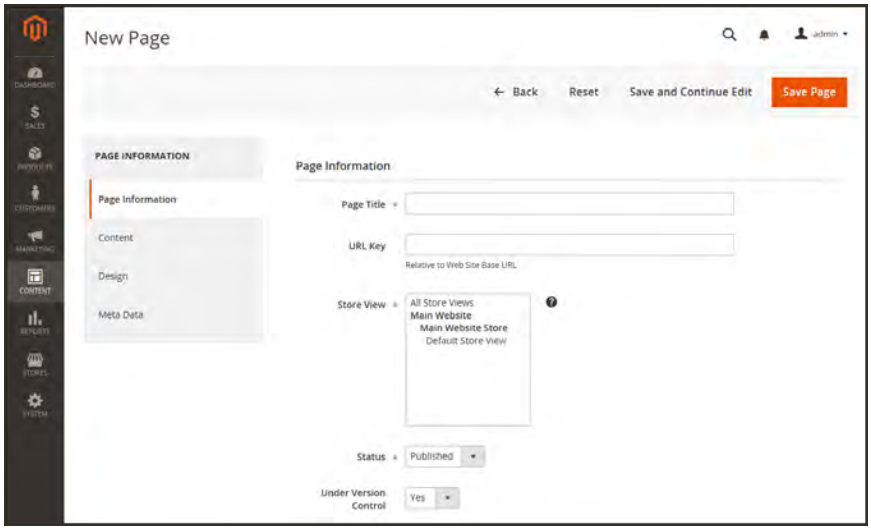
Step 5: Preview the Page

Step 6: Publish the Page

Step 7: Assign a New Home Page (Optional)

Step 1: Add a New Page

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. Tap **Add New Page**.



Page Information

3. In the Page Information section, do the following:
   a. Enter the **Page Title**. The Page Title is meta data that appears in the title bar and tab of the browser.
   b. Enter a **URL Key** for the page, using lowercase characters, and hyphens instead of spaces.

      The URL Key is added to the base URL to create the online address of the page.
   c. In the **Store View** list, select each view where this page is to be available.
   d. Set **Status** to "Disabled." (You can change this later when the page is ready to go live.)
   e. (Advanced) Version control maintains an archive of all page revisions. To learn more, see: Version Control.
4. Tap **Save and Continue Edit**.

Step 2: Choose the Page Layout

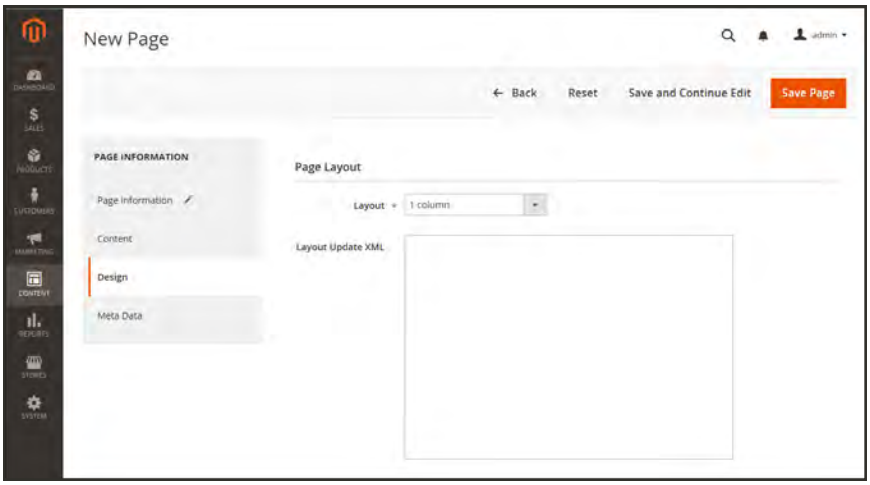
1. In the panel on the left, choose **Design**.
2. In the Page Layout section, set **Layout** to one of the following:

- 1 column
- 2 columns with left bar
- 2 columns with right bar
- 3 columns

To learn more, see: Page Layout.

3. (Advanced) Custom page layouts are used to make custom modifications to the page layout. To learn more, see:Layout Updates .

4. (Advanced) The Custom Design section can be used to change the theme, layout, or style of the page for period of time, such as for a season or promotion. To learn more, see: Custom Design.



Page Layout

Step 3: Complete the Content

1. In the panel on the left, choose **Content**.

2. In the **Content Heading** box, type the text for the main heading at the top of the page.

3. You can work in either of the following modes:

   - If you prefer to use the WYSIWYG editor, tap **Show / Hide Editor**. To learn more, see: Using the Editor.
   - If you prefer to work directly with the HTML, tap **Show / Hide Editor** again to return to code view.

4. Complete the content and format the text as needed. You can add images, variables, and a variety of frontend apps with dynamic data.

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

Step 4: Complete the Meta Data

1. In the panel on the left, choose **Meta Data**.
2. Complete the **Keywords** and **Description** for the page. This information helps search engines to index the page.
3. Tap **Save and Continue Edit**.

Step 5: Preview the Page

1. To proofread the page and check the formatting, tap **Preview** at the top of the workspace.
2. The preview opens in a new browser tab. To return to your work, either close the preview tab, or switch to the tab that is open to the Admin of your store.

Step 6: Publish the Page

1. When you are ready to publish the page, do the following:
   a. In the panel on the left, choose **Page Information**.
   b. Set **Status** to "Published."
2. Tap **Save Page**.

   Now that your page is complete, it can be added to your store navigation, linked to other pages, or from the footer of your store. You can also use it as your new home page.

Step 7: Assign a New Home Page (Optional)

1. Complete the steps to create 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:
   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.

Using the Editor

The WYSIWYG editor gives you the ability to enter and format while working in a “What You See Is What You Get” view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for pages, blocks, and product descriptions. When working in the product catalog, the editor is accessed by clicking the WYSIWYG Editor button.

For a complete list of toolbar buttons, see the Editor Toolbar in the appendix of this guide.

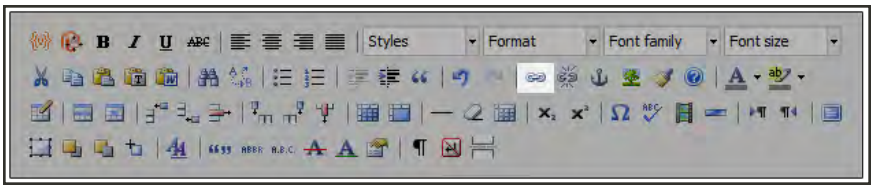
Editor Toolbar

Inserting a Link

An easy way to insert a link is to use the Link button in the editor toolbar. It doesn't require any knowledge of HTML, and the result is the same.

To insert a link:

1. Highlight the text where you want to create the link. Then, in the editor toolbar, tap the **Link** button.

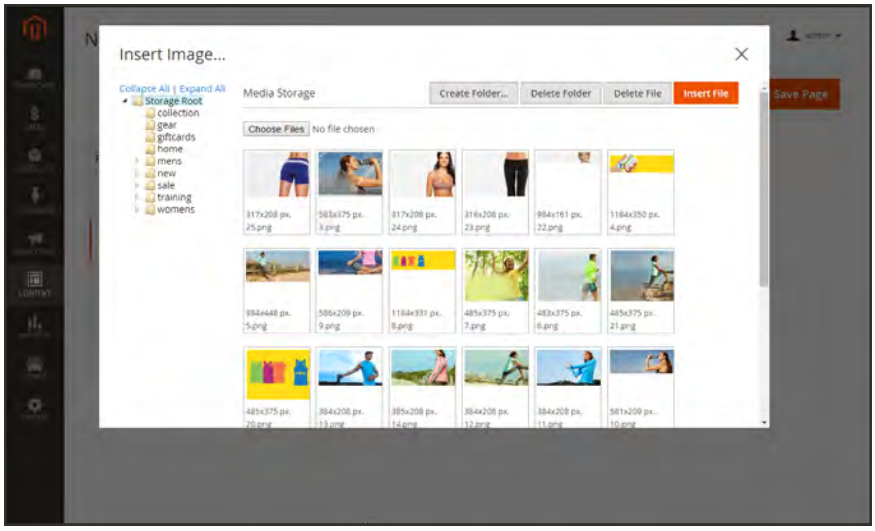


Insert Link Button

2. In the **Link URL** field, enter one of the following:
   - The **URL Key** of a page in your store.
   - The full **URL** of an external page to be linked.
3. Set **Target** to one of the following:
   - Open link in the same window
   - Open in a new window
4. In the **Title** field, enter the tooltip text to appear when someone hovers over the link.
5. Tap **Insert** to create the link.

Inserting an Image

From the editor, you can insert an image that has been uploaded to Media Storage, or link to an image that resides on another server.



Media Storage

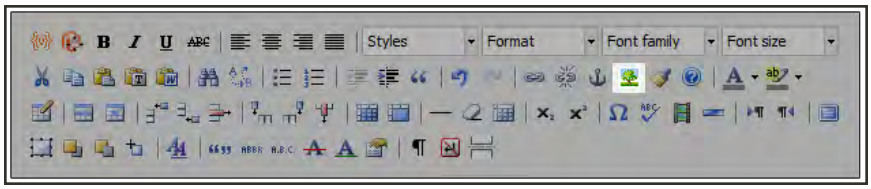
Method 1: Insert an Image from Media Storage

1. If necessary, tap **Show / Hide Editor** to work directly with the code.
2. Position the cursor where you want the code for the image to be inserted. Then, tap **Insert Image**.
3. Choose the image that you want to use, and tap **Insert File**.
4. To view the image in WYSIWYG mode, tap **Show / Hide Editor** again.

Method 2: Insert an Image from Another Server

Use this method to insert an image that is available online, but resides on another server. You must have the full URL of the image to complete the process.

1. If necessary, tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position your cursor where you want the image to appear.
3. On the Editor toolbar, tap the **Insert Image** button. Then, do the following:



Insert Image Button

a. In the **Image URL** field, paste the full URL to the image on the other server.

b. In the **Image Description** field, enter a brief description of the image.

c. In the **Title** field, enter a relevant title for the image.

4. Tap **Insert** to complete the process.

Inserting a Widget

The Widget tool can be used to add a variety of content elements to the page, including links to any content page or node, product, or category. Links can be positioned on the page in a block format, or incorporated directly into the content. You can use the Widget tool to create links to the following types of content:

- Page Hierarchy Nodes
- 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 the **Insert Widget**

Method 2: HTML Mode

From the HTML editor, tap **Insert Widget**.

3. When prompted, select 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

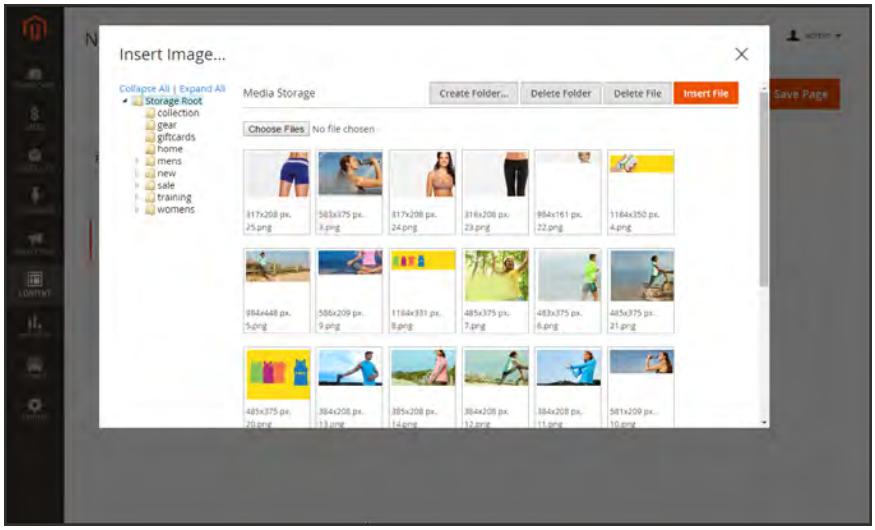
Your store includes many predefined variables that can be incorporated into content pages and other communications.

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**.

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, the files can be managed in a database, or located on a separate server or content delivery network.



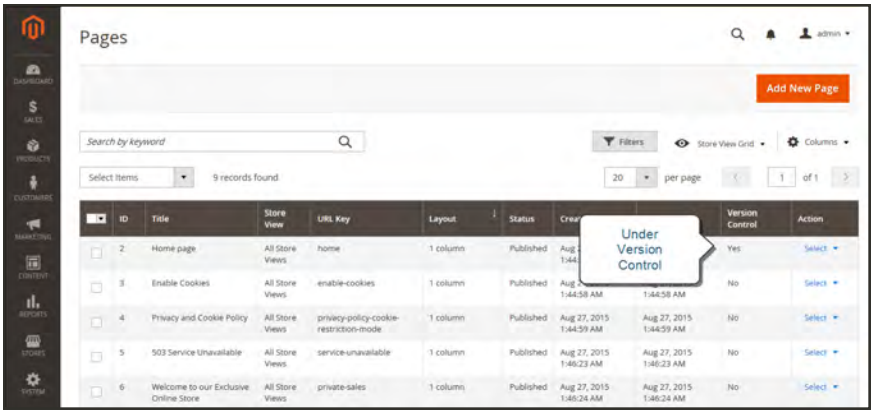
Media Storage

To upload an image to media storage:

1. In the directory tree on the left, navigate to the folder where the image will be stored. If necessary, press the right mouse button, and create any new folders that are needed.
2. From the editor, do the following:
   a. Tap **Browse Files**. Navigate to the file on your computer, and select it. Then, tap **Open** to copy the file name to Media Storage.
   b. Tap **Upload File** to upload the the image to Media Storage.
3. To link the image to a file, click to select the image. Then, tap **Insert File**.
4. To complete the **Alt** tag, place the cursor between the double-quotes, and enter the alt text.
5. To see the image in WYSIWYG mode, tap **Show / Hide Editor**.

Version Control

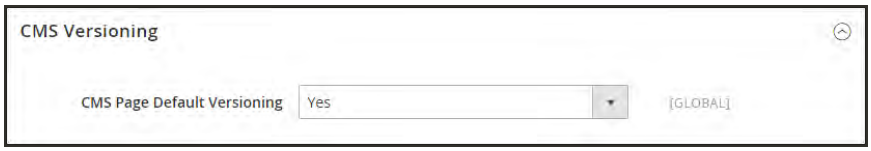
Magento's version control gives you the ability to create multiple versions of a page, track the revision history of each, and restore previous versions. You can also separate the roles of those who create content from those who publish content, based on user permissions. in the grid, the Version Control column indicates which pages are under version control. No matter how many revisions of a page exist, only the most recent revision appears in the Pages grid.



Under Version Control

To enable version control:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **General**, choose **Content Management**.
3. Expand the **CMS Versioning** section.
4. Set **CMS Page Default Versioning** to "Yes."

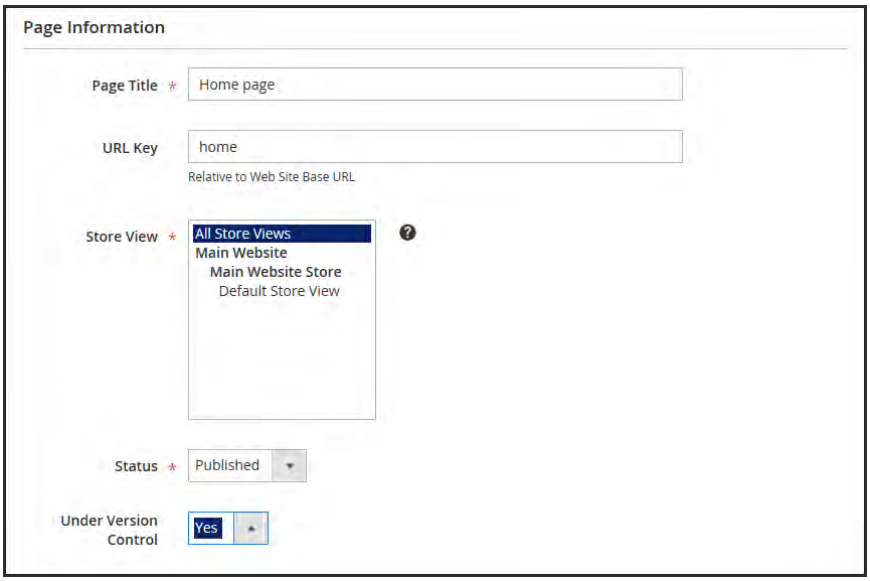


CMS Versioning

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

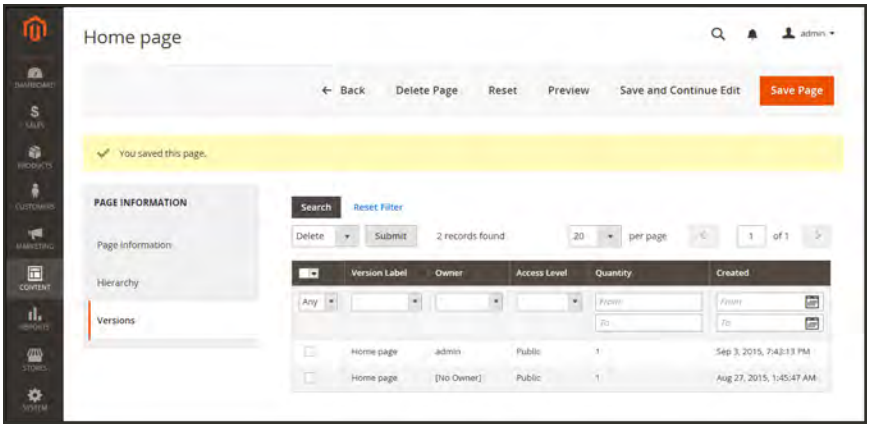
To add version control to a page:

1. On the Admin sidebar, choose **Content**. Then under **Elements**, choose **Pages**.
2. Open an existing page in edit mode.
3. In the Page Information section, set **Under Version Control** to "Yes."



Under Version Control

4. Tap **Save and Continue Edit**.
5. In the panel on the left, choose **Versions**. Then, do the following:

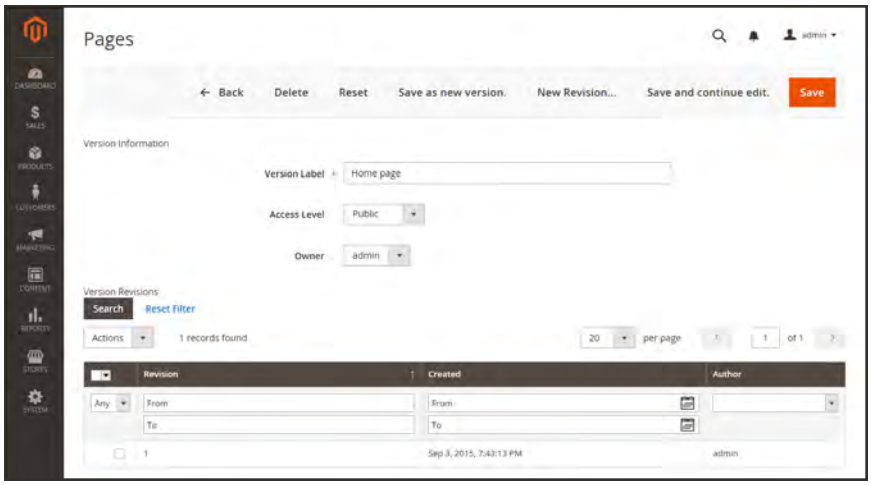


Versions

a. In the list of versioned pages, open the most recent revision in edit mode.

b. In the Version Information section, set **Access Level** to one of the following:

- Private
- Protected
- Public



Version Information

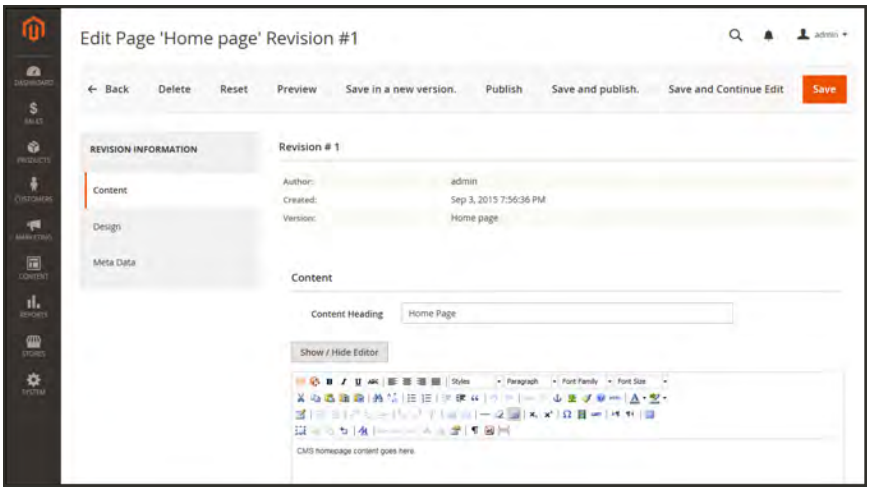
c. If your store Admin has multiple users, set the **Owner** of the page.

6. To make changes to the content of the revision, in the grid, tap the revision to open the page in edit mode.

7. published page, in the panel on the left, select **Versions**, and edit the content, as needed.

8. Do one of the following:

- To save the changes without publishing, tap **Save**.
- To save and publish the revision, tap **Save and publish**.
- To publish without saving, tap **Publish**.
- To save the changes as a page with a different name, tap **Save in a new version**. When prompted, enter the new name for the versioned page.

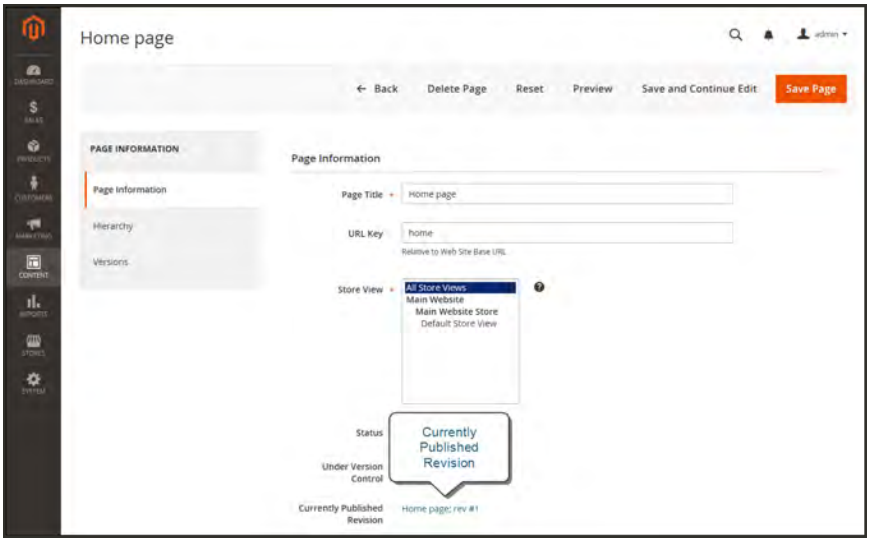


Editing a Revision

When saved, the new revision appears in the grid and the version number increments to reflect the change.

9. To return to Page Information, tap **Back** . Make sure that the **Status** of the page is set to "Published" so the page is visible in the store.

   The currently published version of the page appears at the bottom of the Page Information section. If the page is not yet published, and the Status is set to "Disabled," a link to the version (and revision of the version), appears instead.



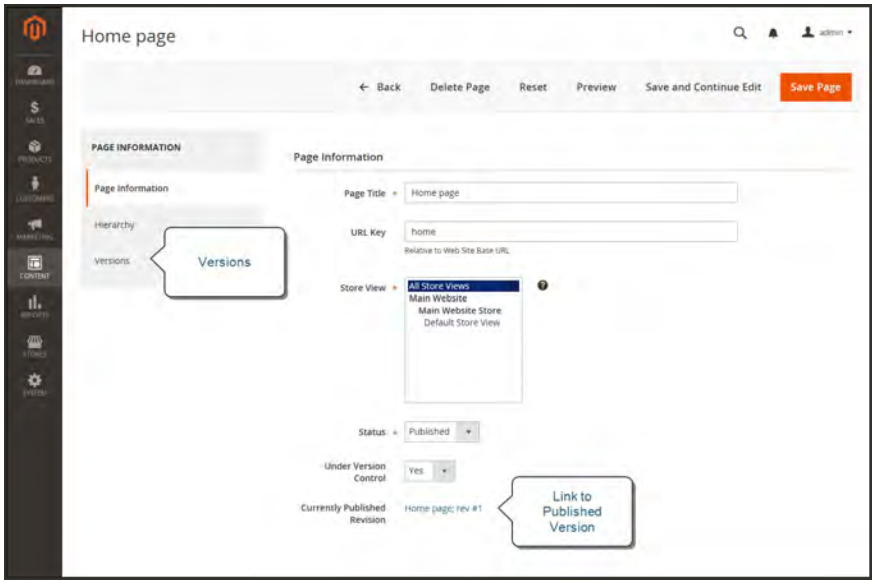
Currently Published Revision

Field Descriptions

FIELD	DESCRIPTION	
Page Information		
Under Version Control	The Under Version Control option is available for every content page. Options:	
	Yes	Multiple revisions of the page can be created, published selectively, and restored as needed.
	No	Only one version of the page is saved, and previous versions cannot be restored.
Version Information		
Version Label	The name of the version is for internal reference, to help you keep track of different versions. For example, you might create a different version of the same page for each season.	
Access Level	Establishes the permissions necessary to access the version. Options:	
	Private	Only the creator of the version can access the content.
	Protected	Only Admin users with Publish Revision permission can access the content.
	Public	All Admin users with CMS Page permission can access the content.
Owner	By default, the owner is the Admin user who creates the page. If the access level is “Private,” and the owner changes, the previous owner can no longer access the content.	

Editing a Versioned Page

Unlike other pages, pages under version control cannot be edited from the Content section of the Page Information panel. Rather, versioned pages have a special section called Versions that is used to manage the content. The Page Information also includes a link to the currently published version of the page.



Revision Information

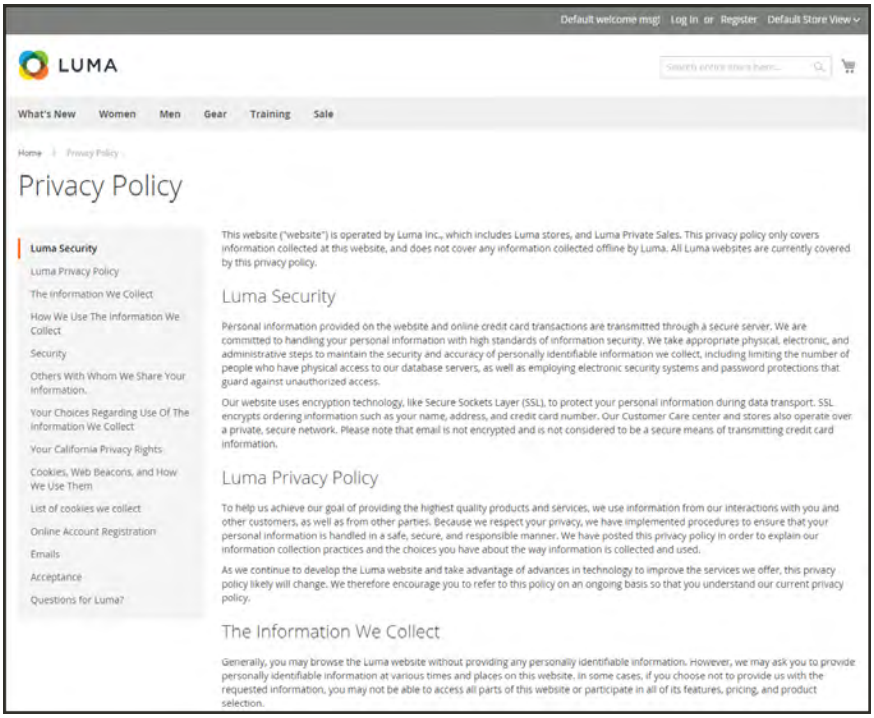
To edit a versioned page:

1. From the Pages grid, open the most recent revision in edit mode.
2. Do one of the following:
   - Under Page Information, click the **Currently Published Revision** link. The page revision opens in edit mode.
   - In the panel on the left, choose **Versions**. Then in the Version Revisions list, open the revision you want to edit.
3. Edit the content as needed.
4. When complete, do one of the following:
   - To save a new revision under the same version name, tap **Save** .
   - To save the revision under a new version name, tap **Save In New Version**. When prompted, enter a new name for the revision.

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.

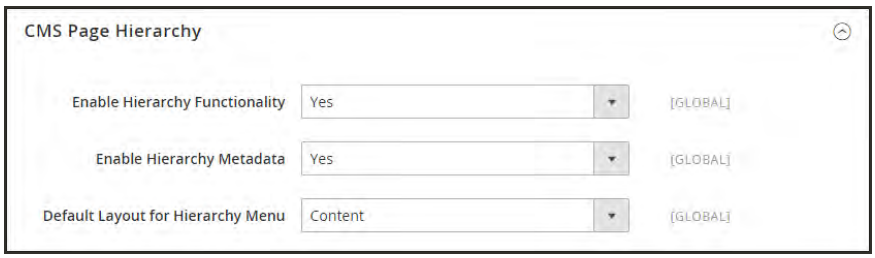
The page hierarchy system uses nodes to identify related pieces of content, and to organize content pages into a parent/child relationships. A parent node is like a folder that might contain child nodes and pages. The relative position of each node and page in the hierarchy is shown as a tree. A node 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.



CMS Page Hierarchy

To configure page hierarchy:

1. On the sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Content Management**.
3. Expand the **CMS Page Hierarchy** section, and make any changes that are necessary.
4. When complete, tap **Save Config**.

Adding a Node

The following example shows how to create a node with simple navigation to related content pages. Although the node does not have a content page that is associated with it, it does have a URL Key which can be referenced elsewhere in your site.

For example, you might create a node called "Press Releases" that has navigation to individual press releases. Then, you can include the link on your "About Us" page. Or you might create a node with links to back issues of your newsletter.

Process Overview:

Step 1: Create a Node

Step 2: Add Pages to the Node

Step 3: Add Navigation

Step 1: Create a Node

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Hierarchy**.
2. Tap **Add Node**.
3. In the Page Properties section, type a **Title** for the node. Then enter a suitable **URL Key** in all lowercase characters, using hyphens instead of spaces.
4. Tap **Save Pages Hierarchy**. The node appears as a folder in the tree.

Step 2: Add Pages to the Node

1. In the hierarchy tree, open the node.
2. Scroll down to the **CMS pages** section, and mark the checkbox of each page you want to include.
3. Click the **Add Selected Pages(s) to Tree** button. Each selected page appears in the tree below the node folder.

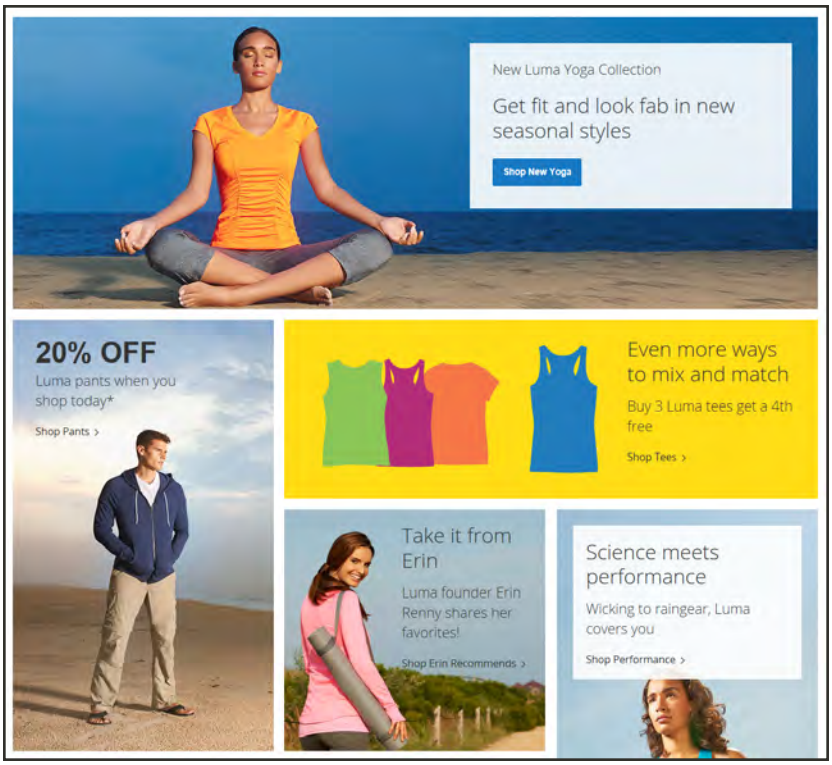
Step 3: Add Navigation

1. In the tree, click to open the node.
2. In the Pagination Options for Nested Pages section, set **Enable Pagination** to "Yes."
3. In the Navigation Menu Options section, and set **Enable Navigation Menu** to "Yes."
4. Scroll back up to the Node Properties section, and click the **Preview** link.
5. Click the **Save Pages Hierarchy** button to save the settings.

CHAPTER 43:

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 that originates in a database or other source. Most elements on the home page are blocks that can be easily managed and replaced.



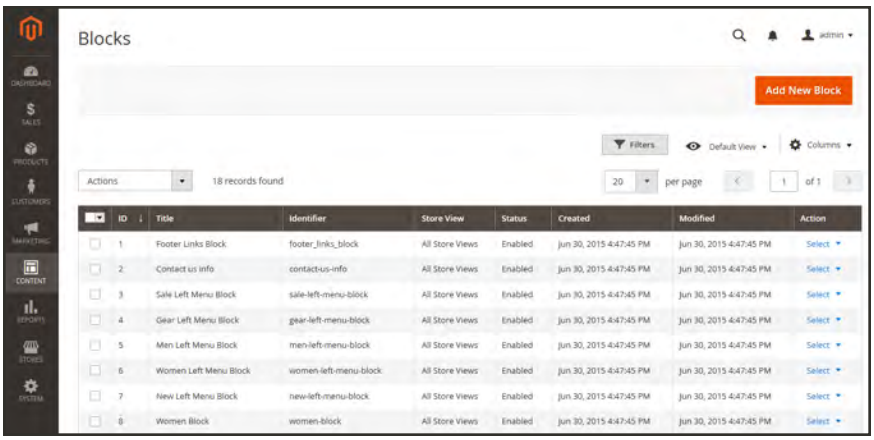
Blocks on Home Page

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.

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.

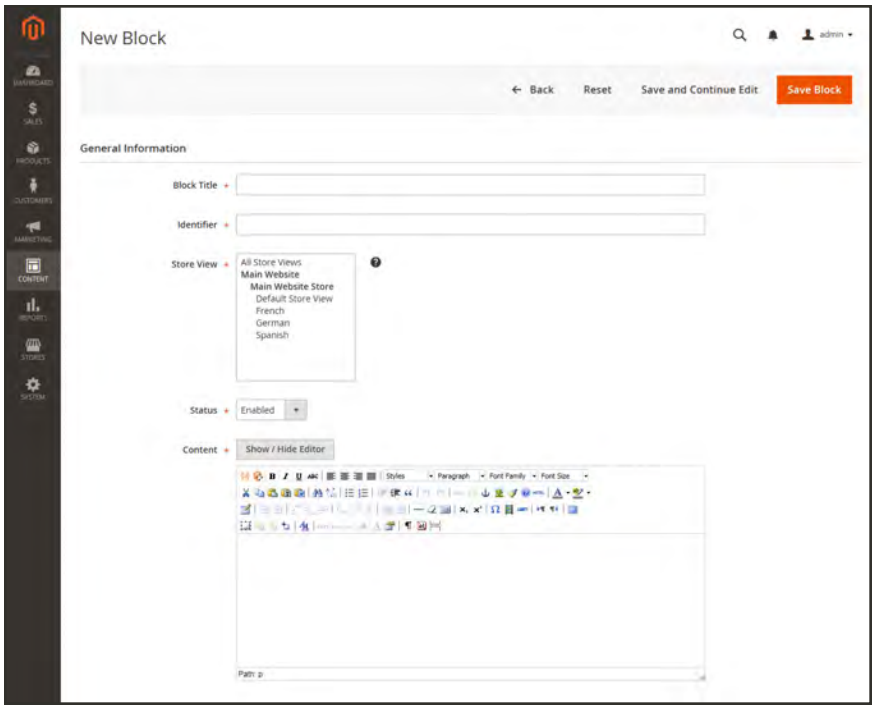
The Blocks workspace uses the same basic controls as the Pages workspace to help you find blocks and perform routine maintenance operations.



Blocks Workspace

To create a block:

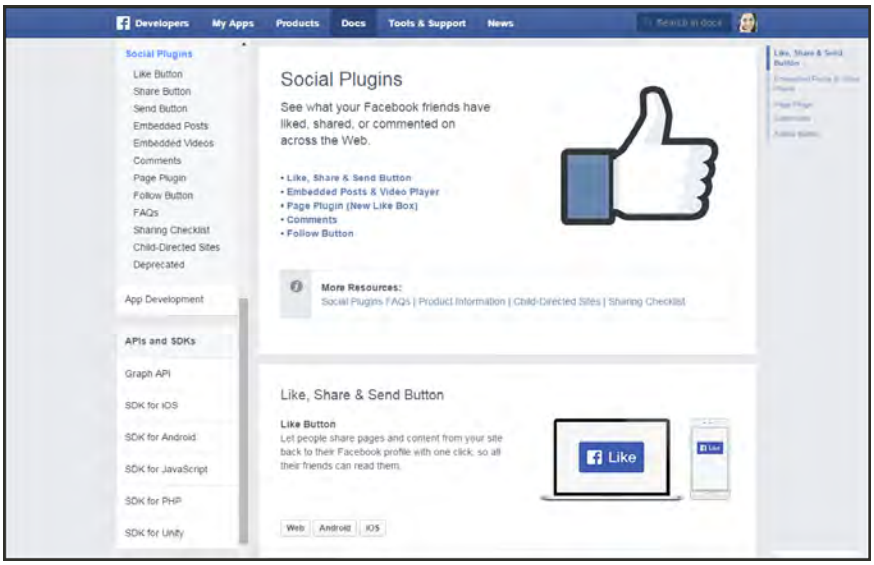
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the upper-right corner, tap **Add New Block**. Then, do the following:
   a. Assign a **Block Title** for internal reference.
   b. Assign a unique **Identifier** to the block. Use all lowercase characters, with underscores instead of spaces.
   c. Choose the **Store View(s)** where the block will be available.
   d. Set **Status** to “Enabled” to make the block visible in the store.
   e. Complete the **Content** of the block
      - You can 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**.



General Information

Adding Social Plugins

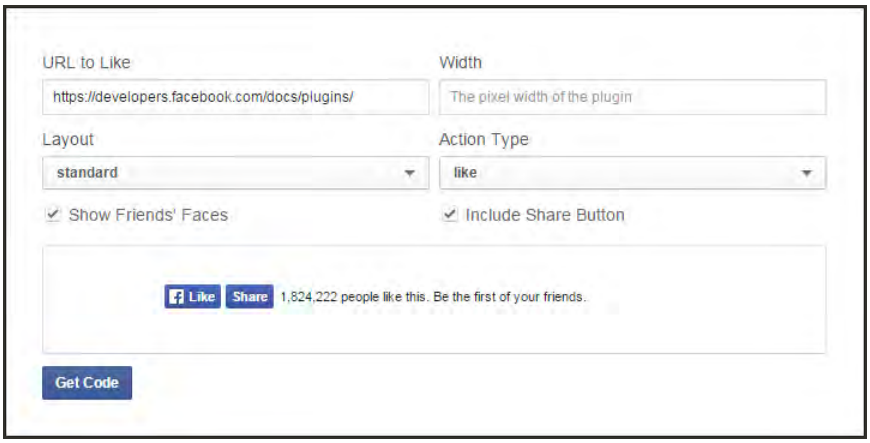
Social networking sites have a numerous oplugins that can easily be added to your store. In addition, there are many extensions on Magento Connect that can be used to integrate your store with social media. The following example shows how to add a Facebook "Like" button to your store.



Facebook Plugins

Step 1: Get the Button Code

1. On the Facebook website, go to the button setup page.
2. In the **URL to Like** field, enter the URL of the page in your store that you want people to Like. For example, you might enter the URL of your store's home page. Then, do the following:
   a. Choose the **Layout** for the button.
   b. Enter the **Width** in pixels that is available on your site for the button and any associated text message.
   c. Set **Action Type** to one of the following:
      - Like
      - Recommend
3. Tap **Get Code** to copy the generated code to the clipboard.



Like Button Setup

Step 2: Create a Content Block

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 stores or store views, choose **Store View(s)** where you want the block to appear.
   d. Set **Status** to "Enabled."
   e. Paste the snippet of code that you copied from the Facebook site into the **Content** box.
3. When complete, tap **Save Block**.

Step 3: Place the Block

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Frontend App**.
2. In the upper-right corner, tap **Add New Frontend App**. 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, do the following:
   a. 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:
   b. Set **Page**to 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.
   c. Choose the **Block Reference** to identify the place on the page where the block is to be placed.
   d. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."
   e. Tap **Save and Continue Edit**.
5. In the panel on the left, select **Widget Options**.
6. Tap **Select Block...**. Then in the list, choose the block that you want to place.
7. When complete, tap **Save**.

   The widget now appears in the list.

8. When prompted, follow the instructions at the top of the workspace to update the index and page cache.
9. Return to your storefront to verify that the block is in the correct location. To move the block, you can reopen the frontend app try a different page or block reference.
   a. Tap **Select Block**.
   b. In the list, find the block that you created for the Facebook Like button, and select the block.
   c. When complete, tap **Save**.

Step 4: Verify the Location in Your Store

Return to your storefront to make sure that the Facebook Like button is in the right location. If you want to try a different place, reopen the frontend app, and change the block reference.

Using a Lightbox or Slider

There is a wide assortment of jQuery-based image lightboxes and sliders available on Magento Connect, and many are free. To add a lightbox or slider to your store, download the extension from Magento Connect, and follow the instructions from the developer.

Positioning Blocks

The code that controls the page layout and placement of blocks is written in XML Widgets make it easy to position a block at a specific place on the page, and even for a specific product or category without writing any code. You can select each option from a list, rather than trying to remember all of the possible combinations.

The following list shows the locations by page type where blocks are typically placed. To learn more about how areas on the page are defined, see: Standard Page Layouts.

Category and CMS Pages

BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

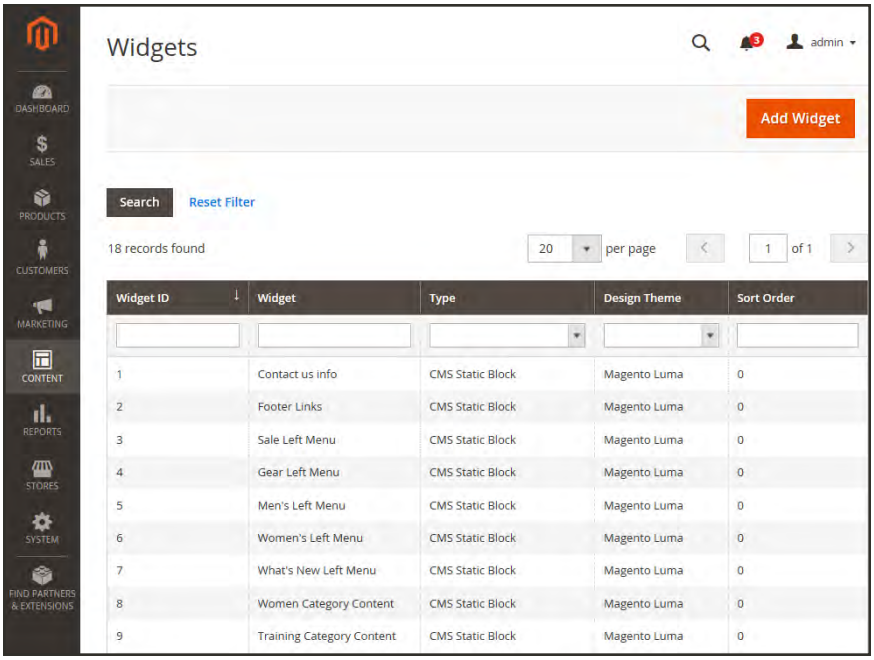
Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition) Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.

BLOCK REFERENCE	POSITION
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.

Using a Widget to Place a Block

The CMS Static Block widget gives you the ability to place an existing content block most anywhere in your store.



Widgets

Process Overview:

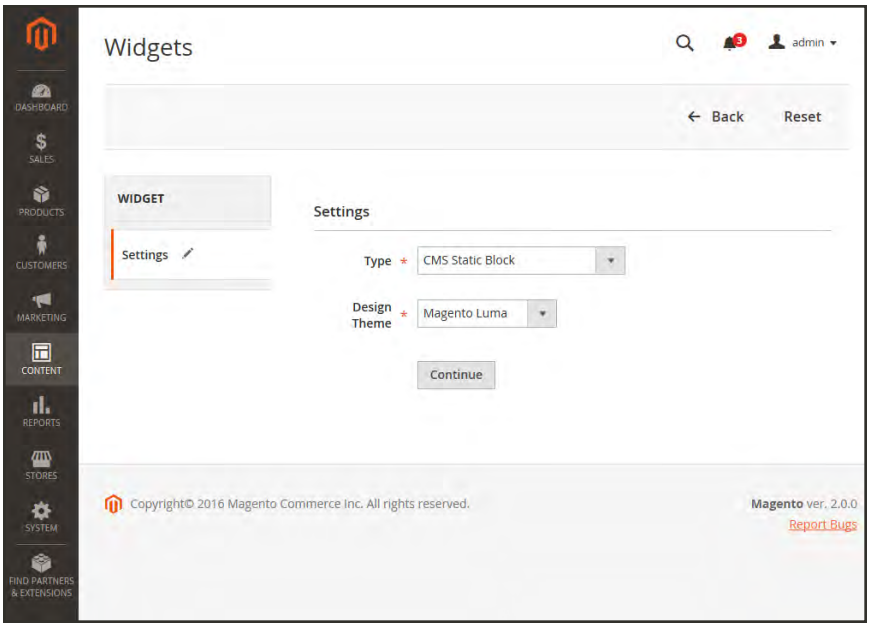
Step 1: Choose the Type

Step 2: Complete the Layout Updates

Step 3: Place the Block

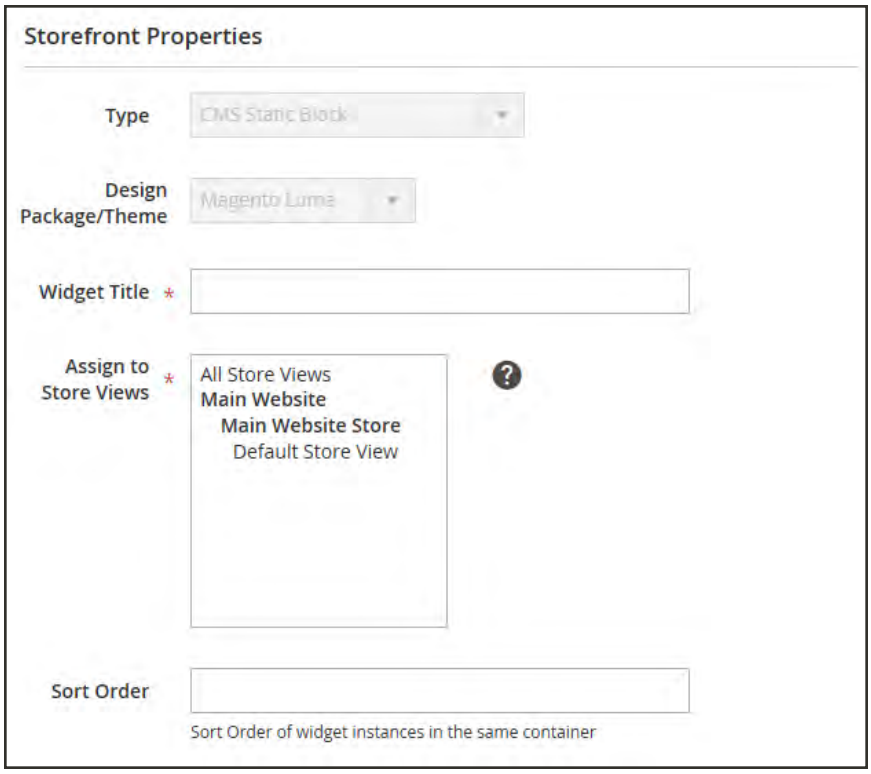
Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then do the following:
   a. In the Settings section, set **Type** to "CMS Static Block." Then, tap **Continue**.
   b. Verify that **Design Theme** is set to the current theme.
   c. Tap **Continue**.



Settings

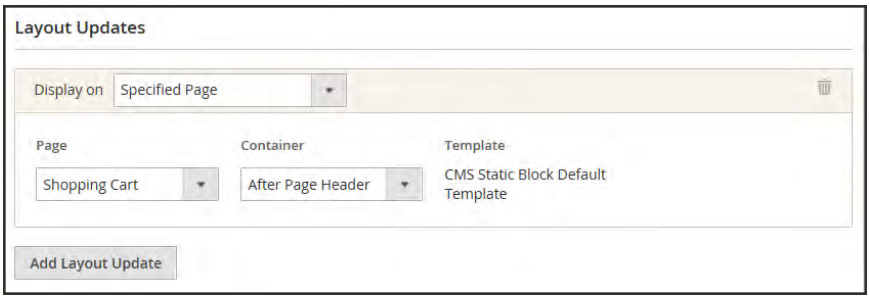
3. In the Storefront Properties section, do the following:
   a. In the **Widget Title** field, enter a descriptive title for internal reference.
   b. Set **Assign to Store Views** to "All Store Views," or to the view where the widget will be available. To choose more than one, hold the Ctrl key down and select each option.
   c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.



Storefront Properties

Step 2: Complete the Layout Updates

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
2. Set **Display On** to the category, product, or page where you want the block to appear. To place the block on a specific page, do the following:
   a. Choose the **Page** where you want the block to appear.
   b. Choose the **Block Reference** that identifies the place on the page where the block is to be placed.
   c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."

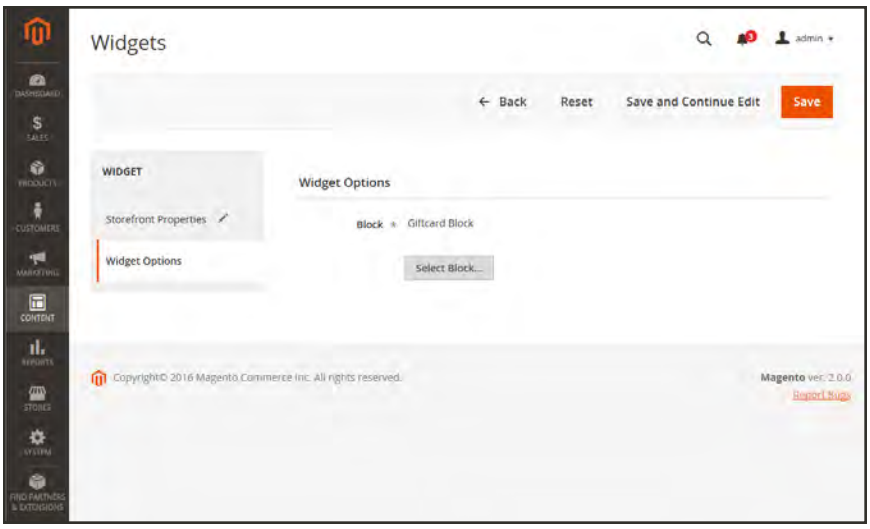


Layout Updates

Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.
2. Tap **Select Block...**.

   Then in the list, choose the block that you want to place.
3. When complete, tap **Save**.



Widget Options

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 open the widget in edit mode, and try a different page or block reference.

Using a Layout Update to Place a Block

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, the page must have a two-or three-column layout. To learn more, see: Page Layout.

To place a block in the sidebar of a page:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the grid, find the block you want to place, and take note of its **Identifier**. Make sure that you have the correct spelling.
3. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
4. Find the page where you want to place the block, and open the page in edit mode.
5. In the panel on the left, choose **Design**. Then, do the following:
   a. In the **Layout Update XML** box, enter the code for the right or left sidebar, as shown in example.

   Code for CMS Block in Sidebar

   ```
   <reference name="right">
   <block type="cms/block" name="right.permanent.callout">
   <action method="setBlockId"><block_id>your-block-id</block_
   id></action>
   </block>
   </reference>
   ```

   a. Change the **reference name** to identify either the “right” or “left” column, according to the layout of the page.
   b. 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 44:

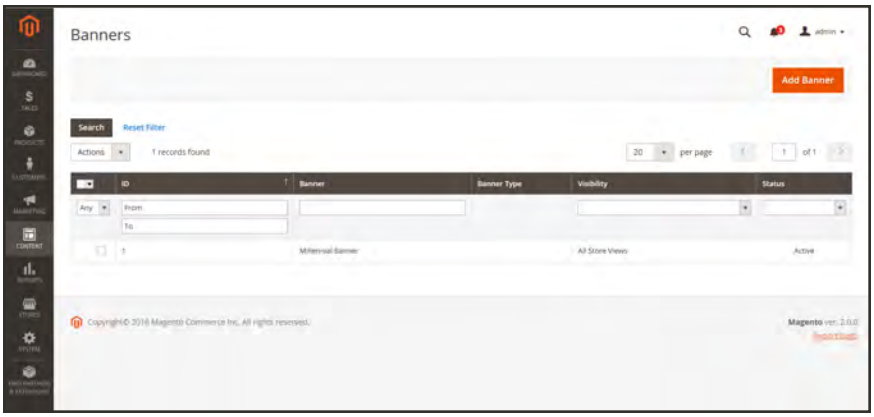
Banners

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.

Creating a Banner

A banner can be as simple as a text message or iimage, or contain a combination of text, images, and code that is triggered by a promotion. After a banner is created, you can use the Frontend App tool to place it in your store, or add it to a sequence of rotating banners.

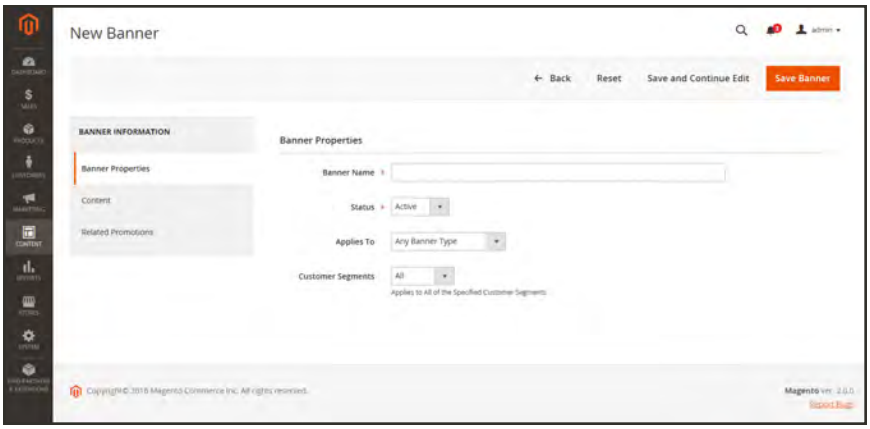


Banners

Step 1: Complete the Banner Properties

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Banners**.
2. In the upper-right corner, tap **Add Banner**. Then, do the following:
   a. Enter a **Banner Name** for internal reference.
   b. Set **Status** to "Active."
   c. In the **Applies To** list, select one of the following:
      - Any Banner Type
      - Specified Banner Types

      This setting determines the location on the page where the banner is placed. (To select more than one, hold the Ctrl key down and click each option.)



Banner Properties

d. If the banner is to be used for a specific customer segment, set **Customer Segments** to "Specified." Then, select 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 have different content for each store view, mark the **No Default Content** checkbox. Then, complete the information in the **Store View Specific Content** section for each view.

1. 

   Default Content

3. In the text box, enter any HTML code that is needed for 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

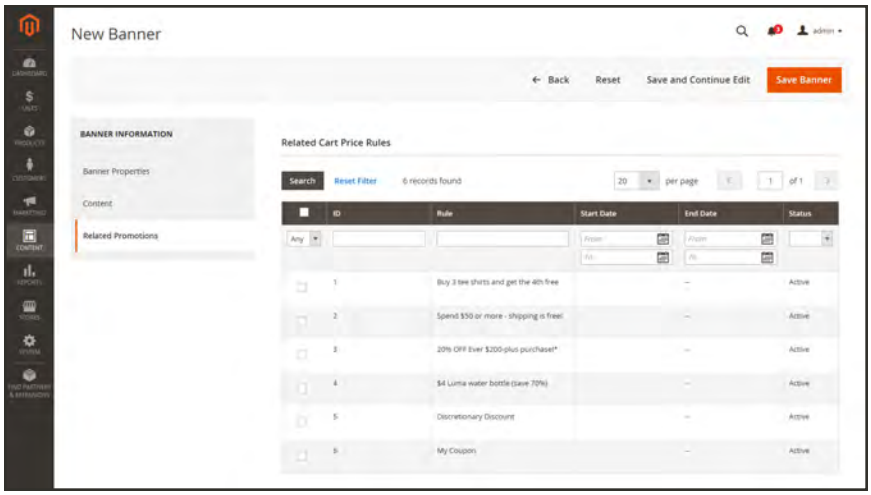
1. Tap **Insert Image**.
2. In the text box, position the cursor where you want the image tag to be inserted.
3. Do either of the following:
   - Tap **Browse** to find the image on your local computer.
   - Locate the image in the media folders on the left.
4. Tap **Insert File**.

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.

Step 3: Choose a Related Promotion

1. In the panel on the left, choose **Related Promotions**.
2. Scroll down through the list of available promotions, and select the checkbox of each promotion that is to use the banner.



Related Promotions

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

Banner Type by Location

LOCATION	DESCRIPTION
Content Area	The width of the main content area varies, depending on the column layout of the page.
Footer	The bottom section of the page contains the footer links and copyright notice.
Header	The top section of the page contains your logo, account links, search box, and top navigation.
Left Column	The left column of a two- or three-column layout.
Right Column	The right column of a two-or three-column layout.

Rotating Banners

A banner rotator can be used to display a single banner, or multiple banners in a specific sequence or random order. The next banner in the sequence appears whenever the page is refreshed.

The banner rotator is a frontend app that can be assigned to a specific page, product, or category, and placed most anywhere in your store. In addition, banner rotators can be associated with a specific cart or catalog price rule.

Process Overview:

Step 1: Create the Individual Banners

Step 2: Add a Frontend App

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 Frontend App

Follow the basic steps to add a frontend app.

- 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 **Frontend App Options**. Then, do the following:
   a. Set **Banners to Display** to “Specified Banners.”
   b. (Optional) To limit the banner to a certain area of the page, set **Restrict by Banner Types** to the place on the page where you want the banner to appear.
   c. Set **Rotation Mode** to one of the following:
      - Do not rotate, display all at once
      - One at a time, Random
      - One at a time, Series
      - One at a time, Shuffle
2. To choose the banners to be included in the rotator, do the following:

a. In the Specify Banners section, use Search to find the banners you want to include. If necessary, tap **Reset Filter** to list all the available banners.

b. Mark the checkbox of each banner you want to include in the rotator.

c. To set the sequence of each banner in relation to the others, enter a number in the **Position** column. To place a banner in the first position, enter the number 1.

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

Banner Layout Update Options

OPTION	DESCRIPTION	
Display On Categories	Determines the categories where the banner rotator appears.	
	Anchor Categories	Appears only on anchored category pages listed in the layered navigation.
	Non-Anchor Categories	Appears only on non-anchored category pages, which are category pages that are not shown in the layered navigation.
	Products	Displays the banner rotator for a specific product, or type of product. Options: All Product Type Simple Product Grouped Product Configurable Product Bundle Product Virtual Product Gift Card
Categories	Displays the banner rotator for only the categories selected.	
Block Reference	Assigns the banner rotator to a specific location by reference. Options:	

Banner Layout Update Options (cont.)

OPTION	DESCRIPTION	
	Breadcrumbs	Page Footer Before
	Left Column	Page Footer Bottom
	Main Content Area	Page Header
	My Cart Extra Actions	Page Top
	Navigation Bar	Right Column
	Page Bottom	Store Language
Template	Options include: Banner Block Template Banner Inline Template	

Banner Frontend App Options

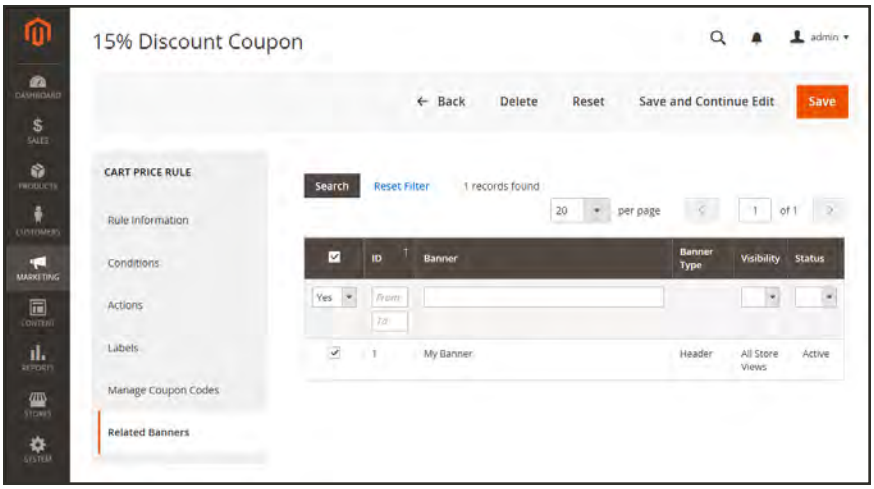
OPTION	DESCRIPTION	
Banners to Display	Options: Specified Banners Shopping Cart Promotions Related Catalog Promotions Related	
Restrict by Banner Types	Limits the banner to a certain section. Options: Content Area Footer Header Left Column Right Column	
Rotation Mode	Select the rotation mode for the banners. Options:	
	Do not rotate	Display one banner after the other, in a stack where all are visible.
	One at a time, Random	Displays the banners that you specify in a randomly generated order. Every time the page is refreshed, a different (and random) banner appears.

Banner Frontend App Options (cont.)

OPTION	DESCRIPTION	
	One at the time, Series	Displays the banners that you specify by the order of their position every time the page is refreshed.
	One at the time, Shuffle	Displays one banner at a time in a shuffled position order. This option is similar to the One at a time, Random option, except that the same banner does not repeat back-to-back (unless you have only one banner).
Specify Banners	Select the banners to include from the list of available banners.	

Using Banners in Price Rules

Any banners you create can be associated with both catalog and cart price rules for a promotion. To associate a banner with a price rule, first create the banner and the price rule.



Related Banners

To associate a banner with a price rule:

1. On the Admin sidebar, tap **Marketing**. Then, under **Promotions**, chooose one of the following:
   - Catalog Price Rules
   - Cart Price Rules
2. In the list, open the rule that is to have the banner. Then, do the following:
   a. In the panel on the left, choose **Related Banners**.
   b. In the list, 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 45:

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.

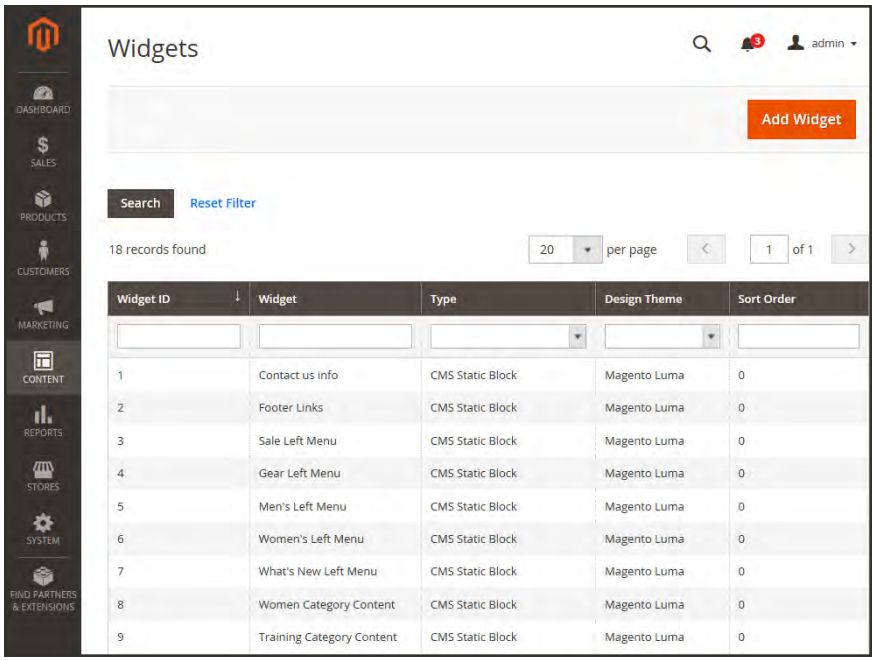
Widget Types

Widgets

TYPE	DESCRIPTION
Banner Rotator	Displays a series of banners in a rotating sequence.
CMS Hierarchy Node Link	Displays a link from a node in the page hierarchy.
CMS Page Link	Displays a link to a selected page. Allows you to specify custom text and title. When the link is complete, it can be used in content pages and blocks.
CMS Static Block	Displays a block of content at a specific location on a page.
Catalog Category Link	Displays either an inline or block-style link to a selected catalog category. When the link is complete, it can be used in content pages and blocks.
Catalog Events Carousel	Displays a carousel of upcoming events.
Catalog New Products List	Displays a block of products which have been designated as new, for the duration of time specified in the product record.
Catalog Product Link	Displays either an inline or block-style link to a selected product. The link can be used in content pages and blocks.
Catalog Products List	Displays a list of products by category, type, or individual selection.
Gift Registry Search	Allows customers to search for a specific gift registry. The gift registry must be publicly available.
Order by SKU	Allows customers to order a product by entering the SKU.
Orders and Returns	Gives customers the ability to submit their own requests for returned merchandise authorization.
Recently Compared Products	Displays the block of recently compared products. You can specify the number of products included, and format them as a list or grid.
Recently Viewed Products	Displays the block of recently viewed products. You can specify the number of products included, and format them as a list or grid.
Wish List Search	Allows customers to search for a specific wish list. The wish list must be publicly available.

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.



Widgets

Process Overview:

Step 1: Choose the Type

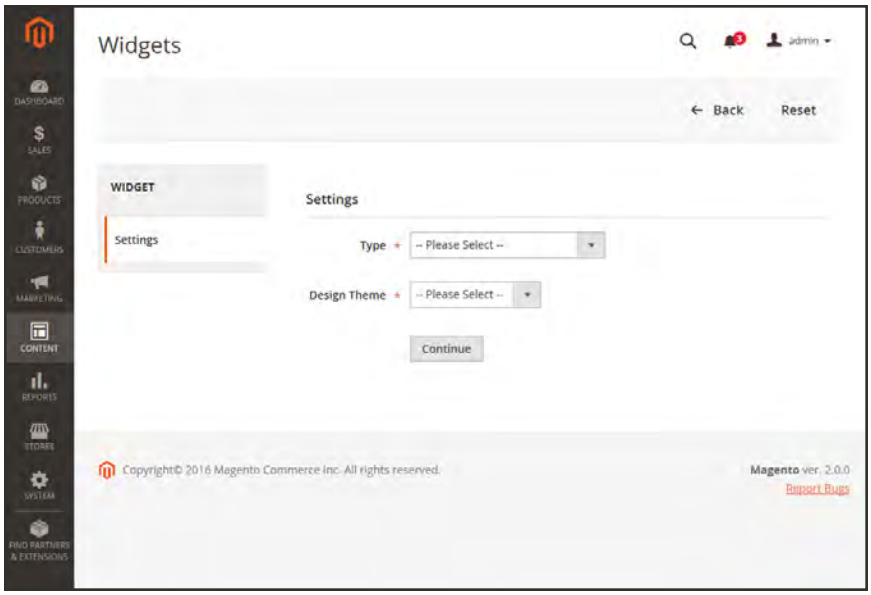
Step 2: Specify Where It Goes

Step 3: Complete the Options

Step 4: Check It Out!

Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. Tap **Add Widget**. Then, do the following;
   a. In the Settings section, set **Type** to the type of widget that you want to create. "Then, tap **Continue**.
   b. Verify that **Design Theme** is set to the current theme.
3. Tap **Continue**.



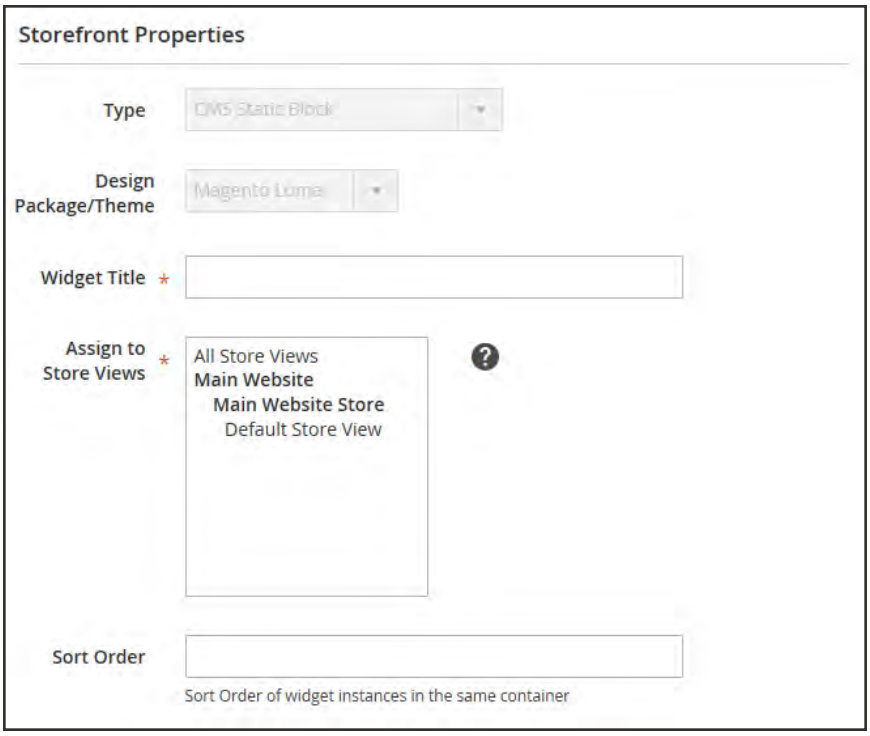
Widget Settings

4. Under **Storefront Properties**, do the following:

   a. In the **Widget Title** field, enter a descriptive title for internal reference.

   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.

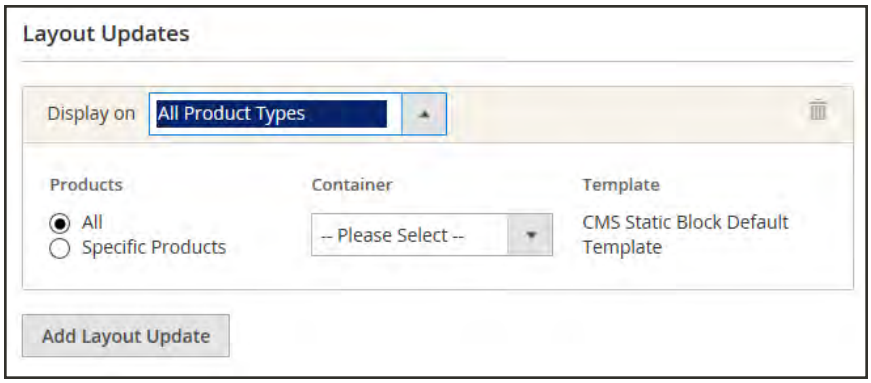
   c. Enter a number in the **Sort Order** field to determine the order of the block if it appears in the same location as other content elements. The top position is zero.



Storefront Properties

Step 2: Specify Where It Goes

1. In the Layout Updates section, tap **Add Layout Update**.
2. Set **Display On** to the type of page where it is to appear.
3. In the **Block Reference** list, choose the area of the page layout where it is to be placed.



Layout Updates

4. If the widget is a link, set **Template** to one of the following:

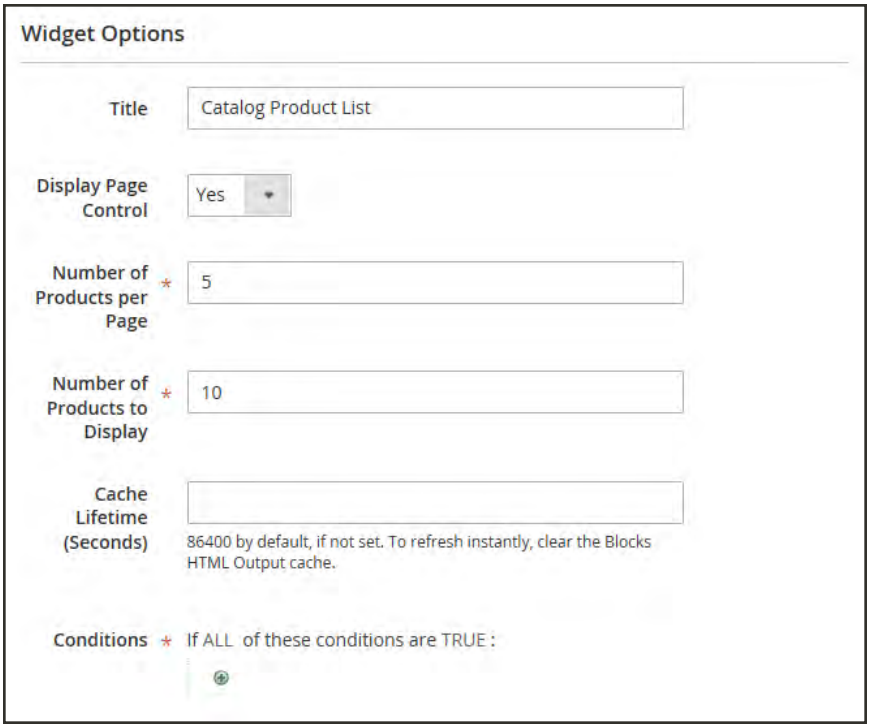
Block Template	Formats the content so it can be placed as standalone unit on the page.
Inline Template	Formats the content so it can be placed inside other content. For example, a link that goes inside a paragraph of text.

Step 3: Complete the Options

The options for each 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** in the list.
   c. To determine how long the list is saved in the case, enter the **Cache Lifetime**, in seconds. By default, the lifetime is set to 86,400 seconds, or 24 hours.

d. Set **Condition** to the category of products to be featured. The process is the same as setting a condition for a price rule.



Widget Options

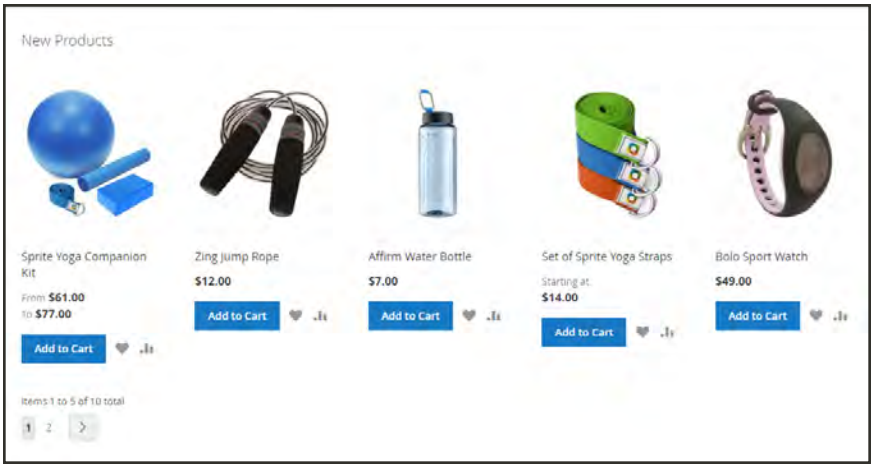
5. When complete, tap **Save**.
6. When prompted, follow the instructions at the top of the workspace to update the cache, as needed.

Step 4: Check It Out!

Return to your storefront to verify that the widget is working correctly. To move it to a different location, you can reopen the widget and try a different page or block reference.

New Products List

The list of new products is an example of dynamic content, and consists of live data that is pulled from your product catalog. By default, the "New Products" list includes the first eight of the most recently added products. However, it can also be configured to include only products within a specified date range.



New Products List on Home Page

Process Overview:

Step 1: Set the Date Range for Each Product

Step 2: Create the Widget

Step 3: Choose the Location

Step 4: Configure the List

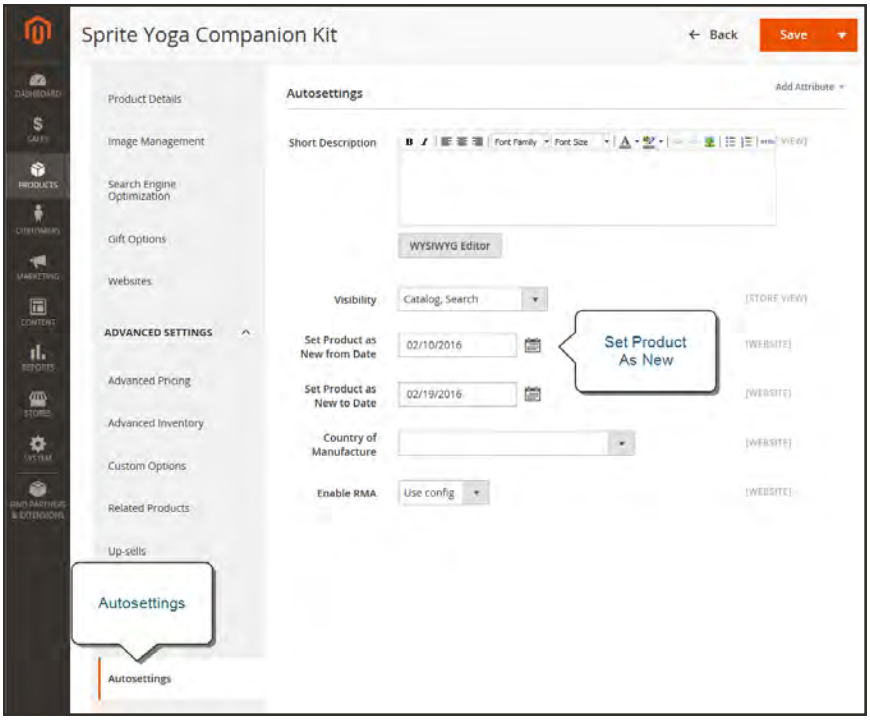
Step 5: Preview Your Work

Step 1: Set the Date Range for Each Product

To make a product appear in the list by date range, the "New From" dates must be entered in each product record. 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 the product that you want to feature, and open in edit mode. Then, do the following:
   a. Under **Advanced Settings**, choose **Autosettings**.
   b. In the **Set Product as New From Date** field, tap the calendar . Then, choose the first date that you want the product to be featured.

c. In the **Set Product as New To Date** field, tap the calendar . Then, choose the last date that you want the product to be featured.



"Set Product As New " Date Range

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

4. When you are prompted to reindex and refresh the page cache, click the links at the top of the workspace, and follow the instructions.

   The product now appears in the New Products list during the date range. Repeat this step for each product that you want to feature.

Step 2: Create the Widget

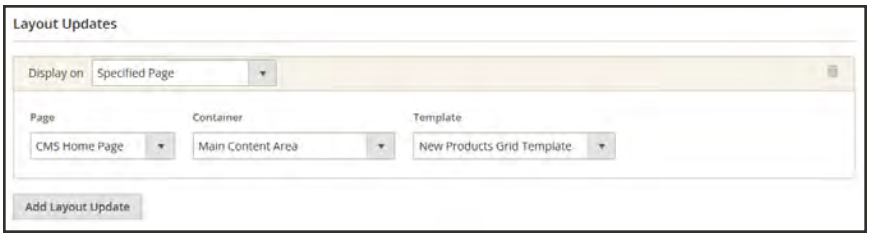
The code that determines the content of the New Products list and its placement in your store is generated by the Widget tool.

1. On the Admin sidebar, choose **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 Package/Theme** that is used by the store.
4. Then, 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 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, click the **Add Layout Update** button. 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. To specify the layout of the list set **Template** to one of the following:
      - New Product List Template
      - New Products Grid Template



Layout Updates

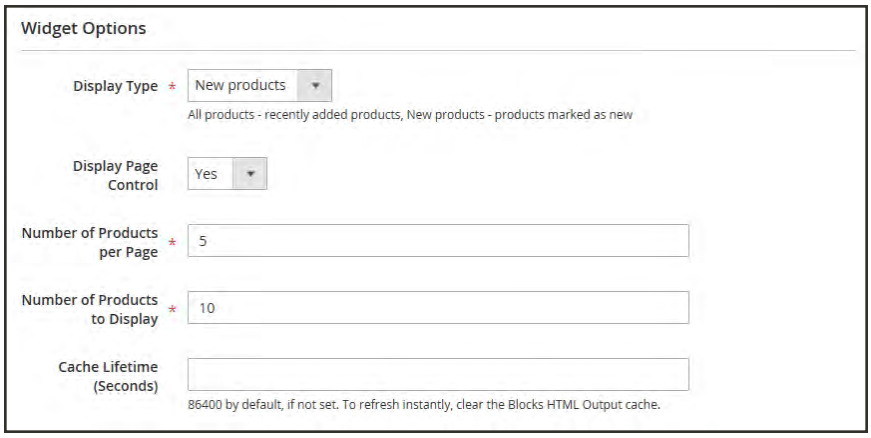
2. Tap **Save and Continue Edit**.

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 specified in the “Set Product As New From” date and “Set Product As New To” date. fields of the product. The list will be blank if the date range expires and no additional products have been set as "New."

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 you want to include in the list. The default setting is 10.
   c. In the **Cache Lifetime (Seconds)** field, select how often you want to refresh the list of new products. By default, the cache is set to 86,400 seconds, or 24 hours.



Widget Options

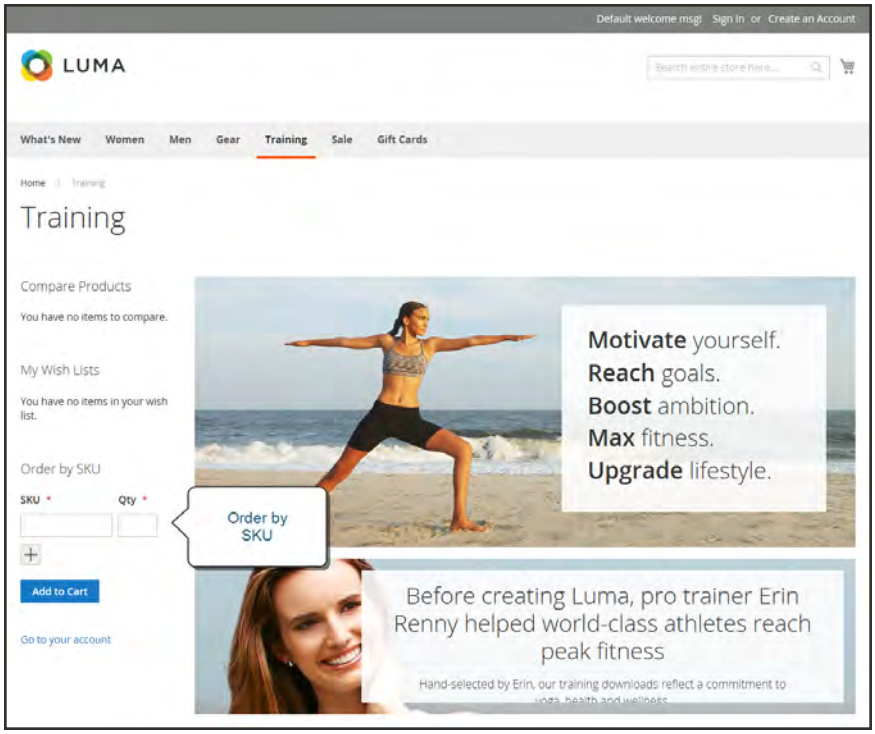
4. When complete, tap **Save**.
5. When prompted to refresh the cache, click the link in the message at the top of the workspace, and follow the instructions.

Step 5: Preview Your Work

Return to your storefront, and to verify that the New Products list appears on the home page. as expected. To make changes, reopen the widget and adjust the settings as needed.

Order by SKU

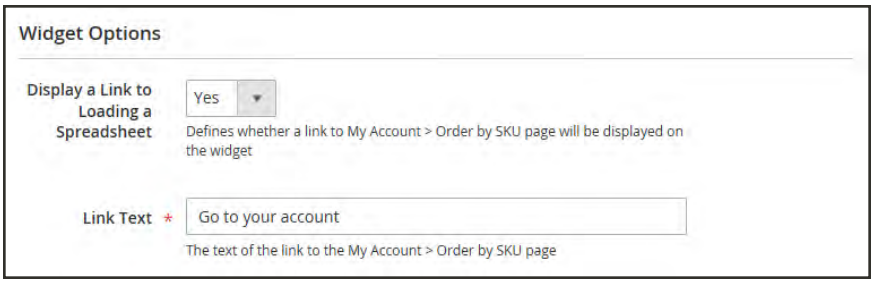
Order by SKU is a widget that allows shoppers to either the SKU and quantity to be ordered directly into a form, or upload a csv file from their customer account.



Order by SKU Widget

To create an Order by SKU widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. Tap **Add Widget**.
3. In the **Settings** section, do the following:
   a. Set **Type** to "Order by SKU."
   b. Choose the **Design Package/Theme** that will be used with the widget.
   c. Tap **Continue**.
4. In the **Storefront Properties** section, do the following:
   a. Enter the **Widget Title**.
   b. In the **Assign to Store Views** list, choose each view where the widget will be available.
   c. Enter a number in the **Sort Order** field to indicate the sequence of the Order by SKU block in relation to other blocks in the column.
   d. Tap **Add Layout Update**. Then, set **Display On** to the pages where you want Order by SKU to appear. The options vary depending on the location selected.
5. In the panel on the left, choose **Widget Options**. Then, do the following:
   a. To include a link to upload order data from a spreadsheet, set **Display a Link to Loading a Spreadsheet** to "Yes."
   b. Enter the **Link Text** that you want to appear in the link.



Widget Options

6. When complete, tap **Save**.

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.

Contents

CHAPTER 46:

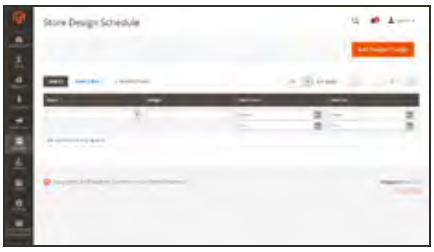
Design Menu

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 will appreciate the flexibility of working with Magento's 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 Magento Design Guide.

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.

CHAPTER 47:

Page Setup

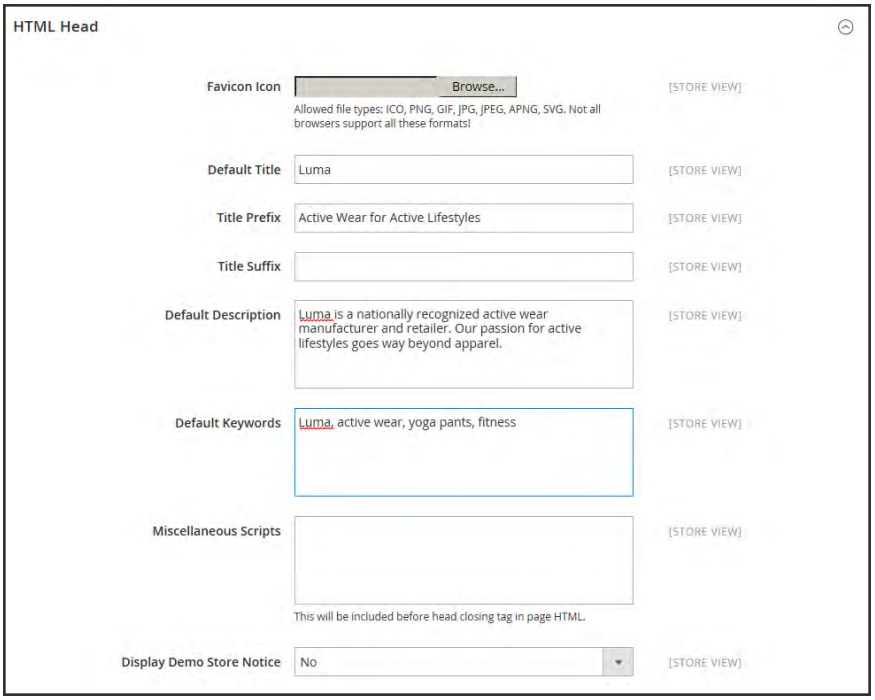
The main sections of the page are controlled, in part, by a set of standard HTML tags. Some of these tags control the selection of fonts, color, size, and background colors and images that appear in each section of the page. Other settings control page elements such as the logo that appears in the header, and the copyright notice in the footer. The basic properties of the HTML head, the page header, and page footer can be set from the Admin:

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 **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. If you have multiple stores or views, set the **Store View** in the upper-left corner to the store view where the configuration applies. (When configuring a specific store view, you must clear the Use Default checkbox after each field so new values can be entered.)
4. Expand the **HTML Head** section.
5. Update the fields as needed. (See the Configuration Reference for a description of each field,)
6. When complete, tap **Save Config**.



HTML Head

Header

The Header section identifies the path to your store logo, and specifies the logo alt text and welcome message.

Header

To configure the header:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand the **Header** section. Then, make any changes necessary. (See the Configuration Reference for a description of each field,)
4. When complete, tap **Save Config**.

Footer

The Footer configuration section is where you can update the copyright notice that appears at the bottom of the page, and enter miscellaneous scripts that must be positioned before the closing <body> tag..

Footer

To configure the footer:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand the **Footer** section. Then, make any changes necessary. (See the Configuration Reference for a description of each field,)
4. When complete, tap **Save Config**.

CHAPTER 48:

Page Layout

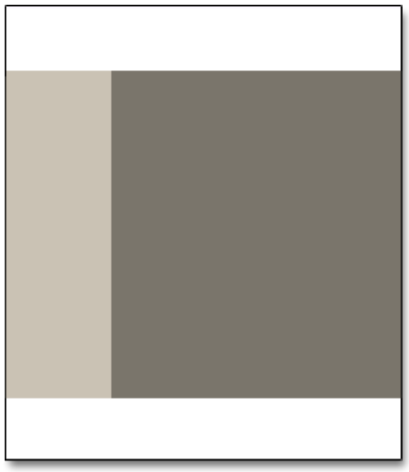
The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the "floor plan" of the page.

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.

Standard Page Layouts

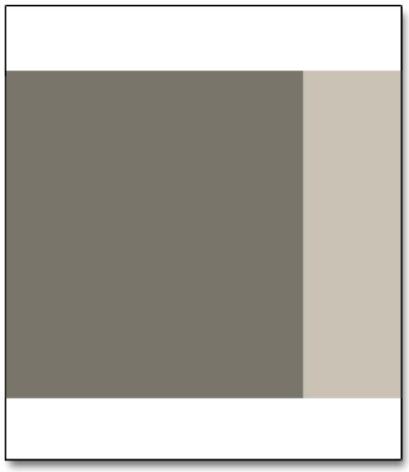
1 Column

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.



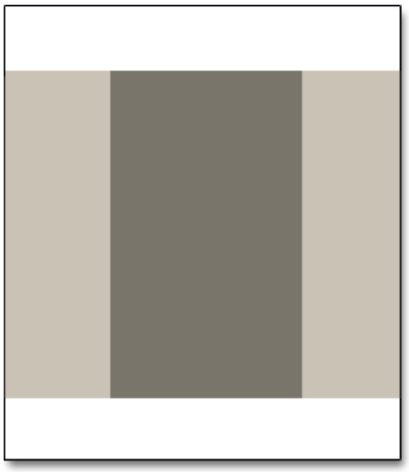
2 Columns with Left Bar

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.



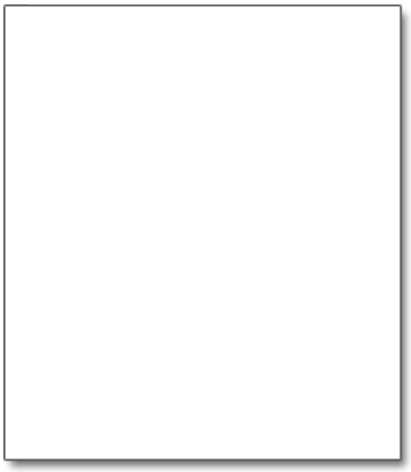
2 Columns with Right Bar

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 Design Guide.

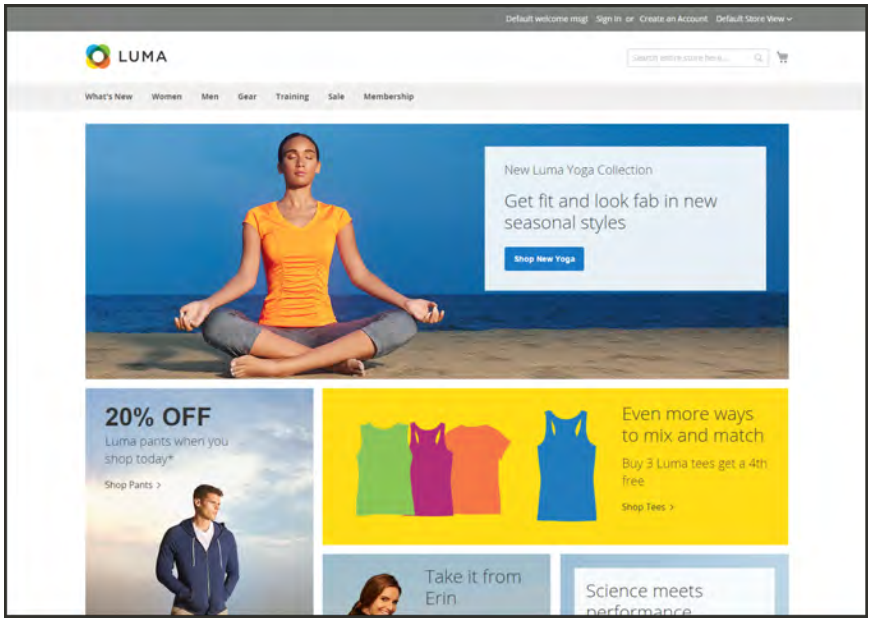
Storefront Examples

The column dimensions are determined by style sheet of the theme. Some themes apply a fixed pixel width to the page layout, while others use percentages to make the page respond to the width of the window or device.

Most desktop themes have a fixed width for the main column, and all activity takes place within this enclosed area. Depending on your screen resolution, there is empty space on each side of the main column.

1 Column Layout

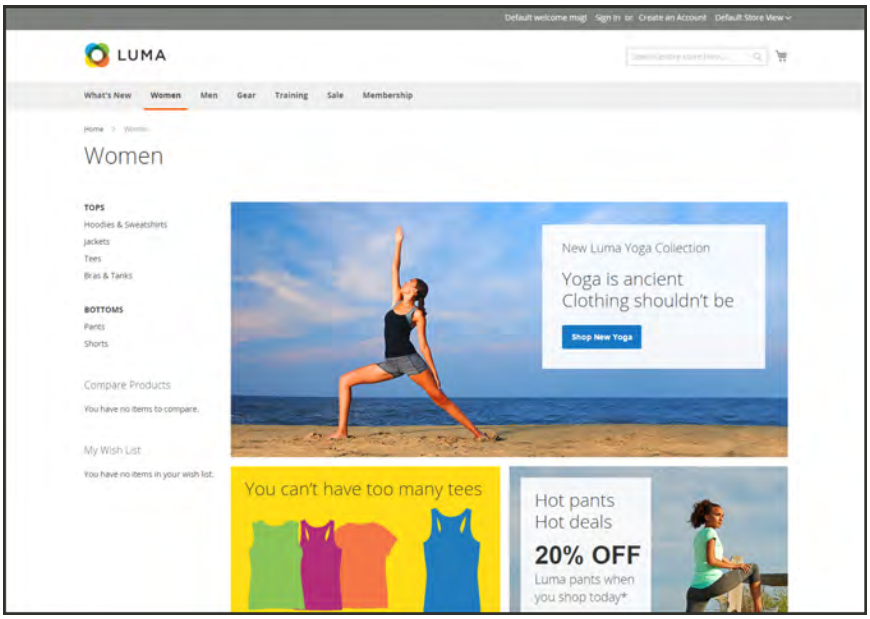
The content area of a "1 Column" layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.



1 Column Layout

2 Columns with Left Bar

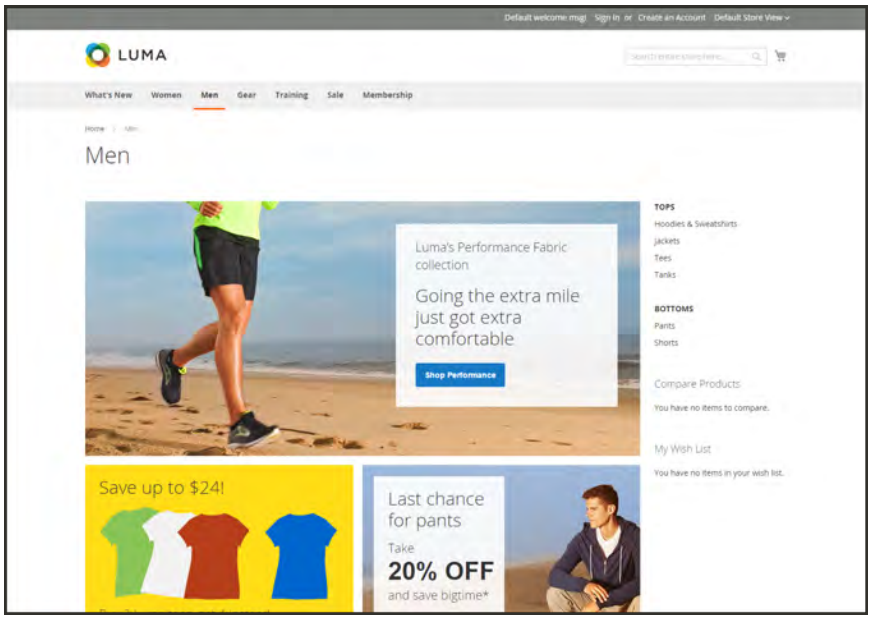
The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.



2 Columns Left Bar

2 Columns with Right Bar

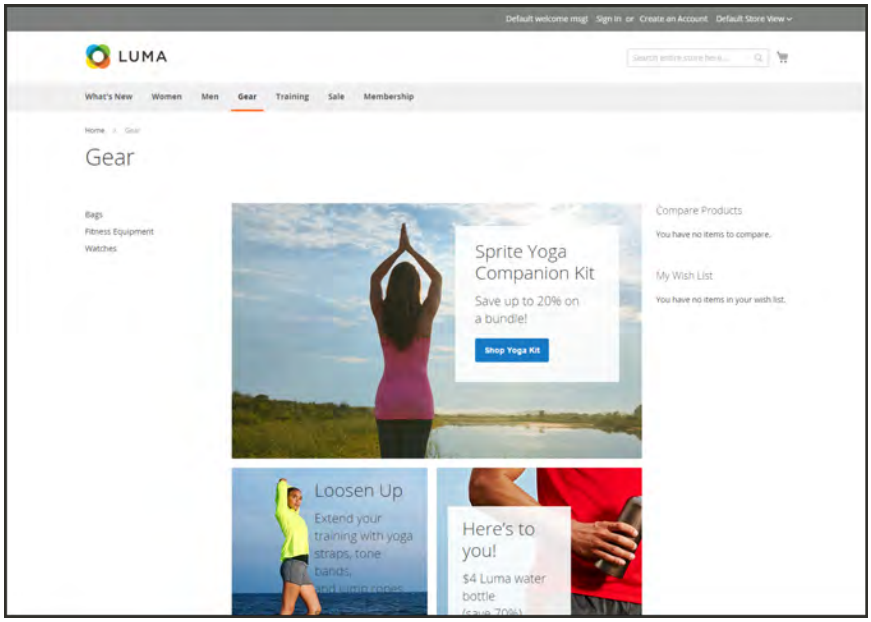
This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.



2 Columns Right Bar

3 Columns

A 3-column layout has a main content area with two side columns. The left side bar and main content column are wrapped together, and float as a unit to the left. The other side bar floats to the right.



3 Columns

Layout Updates

Before you begin working with custom layout updates, it is important to understand how the pages of your store are constructed, and the difference between the terms layout and layout update. The term **layout**[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 Enterprise Edition 2.0 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.

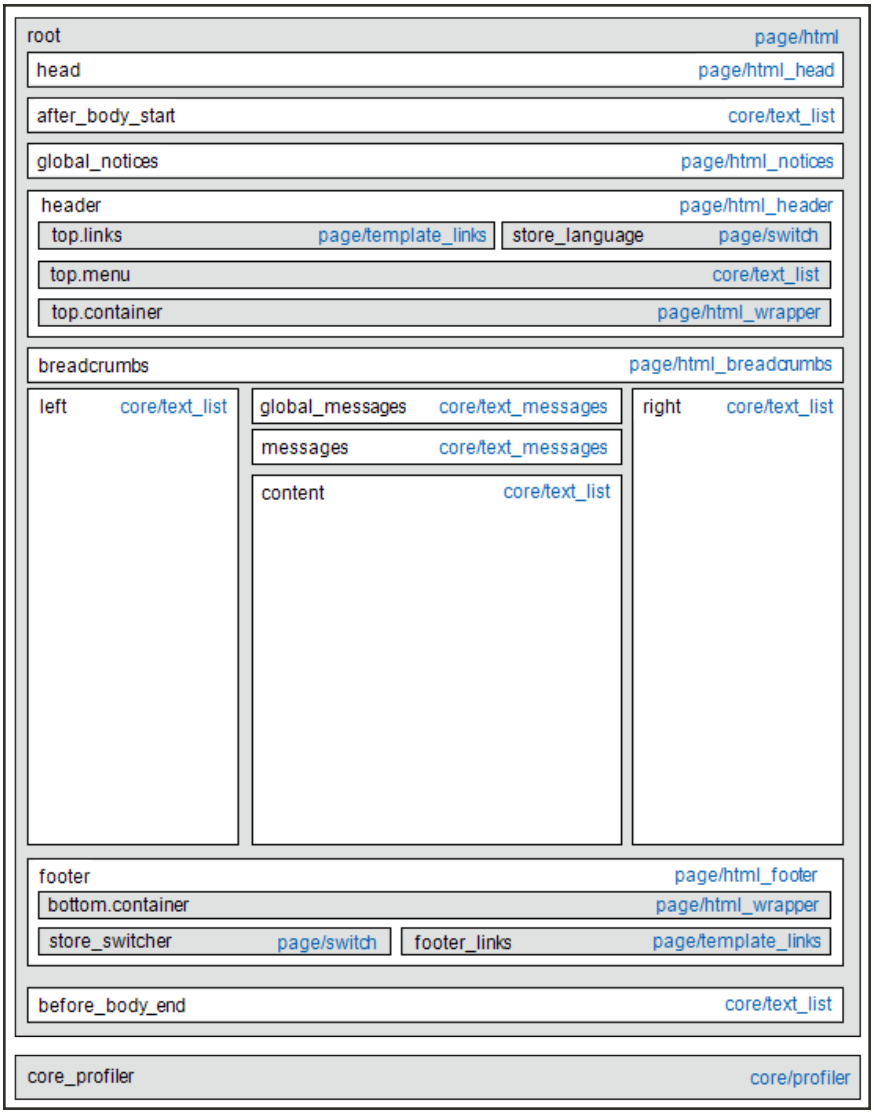
In many cases, the same result can be achieved with the Frontend App tool. To place a block of content as a frontend app, you must identify the page, and the location on the page where you want the block to appear. You can use the Frontend App tool to place a block on most any page in your store, including 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.



Standard Block Layout

Block Descriptions

BLOCK TYPE	DESCRIPTION
`page/html`	There can be only one block of this type per page. The block name is "root," and, it is one of the few root blocks in the layout. You can also create your own block and name it "root," which is the standard name for blocks of this type.
`page/html_head`	There can be only one block of this type per page. The block name is "head," and it is a child of the root block. This block must not be removed from layout.
`page/html_notices`	There can be only one block of this type per page. The block name is "global_notices," and it is a child of the root block. If this block is removed from the layout, the global notices will not appear on the page.
`page/html_header`	There can be only one block of that type per page. The block name is "header," and it is a child of the root block. This block corresponds to the visual header at the top of the page, and contains several standard blocks. This block must not be removed.
`page/html_wrapper`	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.
`page/html_breadcrumbs`	There can be only one block of this type per page. The name of this block is "breadcrumbs," and it is a child of the header block. This block displays breadcrumbs for the current page.
`page/html_footer`	There can be only one block of this type per page. The block name is "footer," and it is a child of the root block. The footer block corresponds to the visual footer at the bottom of the page, and contains several standard blocks. This block must not be removed.
`page/template_links`	There are two blocks of this type in the standard layout. The "top.links" block is a child of the header block, and corresponds to the top navigation menu. The "footer_links" block is a child of the footer block, and corresponds to the bottom navigation menu. It is possible to manipulate the template links, as shown in the examples.

Block Descriptions (cont.)

BLOCK TYPE	DESCRIPTION
`page/switch`	There are two blocks of this type in a standard layout. The "store_language" block is a child of the header block, and corresponds to the top language switcher. The "store_switcher" block is a child of the footer block, and corresponds to the bottom store switcher.
`core/messages`	There are two blocks of this type in a standard layout. The "global_messages" block displays global messages. The "messages" block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.
`core/text_list`	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
`core/profiler`	There is only one instance of this type of block per page. It is used for the internal Magento profiler, and should not be used for any other purpose.

Layout Update Examples

The following blocks types can be manipulated with custom layout instructions. Each action must be specified using the full syntax of the instruction. In the following examples, a simplified notation is used to refer to each action, which corresponds to the full syntax of the instruction.

Full Syntax

```
?
<!-- Action can be specified inside either a <block>
 or <reference> instruction. -->

   <action method="someActionName">
      <arg1>Value 1</arg1>
      <arg2>Value 2</arg2>
      <!--   -->
      <argN>Value N</argN>
   </action>
<!--   -->
```

Simplified Syntax

```
?
someActionName($arg1, $arg2, ..., $argN)
```

page/template_links

Syntax

ACTION	DESCRIPTION
`addLink($label, $url, $title, $prepare`	

Syntax (cont.)

ACTION	DESCRIPTION
	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 "true" if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the new page becomes BASE_URL/newpage if prepared.
`removeLinkByUrl($url)`	Removes a link from the block by its URL. Note that the URL must be properly specified and exactly match corresponding URL of the link you want to remove.

cms/block

Syntax

ACTION	DESCRIPTION
`setBlockId($blockId)`	Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.

```
?
<!--...-->

<reference name="content">
   <block type="cms/block" name="additional.info"
as="additionalInfo">
      <action method="setBlockId"><id>additional_info</id></action>
   </block>
</reference>
<!--   -->
```

core/text

A core/text block can be used to enter free form text directly into the template.

Syntax

ACTION	DESCRIPTION
`addText($textContent)`	Specifies text to be rendered as the block's content. After the text is specified, the layout update instructions must continue to be a valid XML statement. If you use HTML tags as part of the text, it is recommended to use: `<![CDATA[...]]>`

```
?
<!--...-->

<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

NAME		VALUE
`type`	*	`block class path` An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.
`name`	*	`block name identifier` 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.
`before`		`block name | '-'` Is used to position the block before a block with the name specified in the value. If "-" value used the block is positioned before all other sibling blocks.
`after`		`block name | '-'` Is used to position the block after a block with the name specified in the value. If "-" value used the block is positioned after all other sibling blocks.
`template`		`template filename` 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.
`as`		`block alias` 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.

<reference>

Changes the context for all included instructions to a previously defined block. An empty <reference> tag if of no use, because it affects only the instructions which are children.

Syntax

NAME		VALUE
`name`	*	`block name` A name of a block to reference.

<action>

Used to access block API, in other words, call block's public methods. It is used to set up the execution of a certain method of the block during the block generation. Action child tags are translated into block method arguments. The list of all available methods depends on the block implementation (e.g. public method of the block class).

Syntax

NAME		VALUE
`method`	*	`block method name` A name of the public method of the block class this instruction is located in that is called during the block generation.

<remove>

Removes an existing block from the layout.

Syntax

NAME		VALUE
`name`	*	`block name` The name of the block to be removed.

<extend>

This instruction performs final modifications to blocks which are already part of the layout. Every attribute in the <block> instruction—except for the block name—is subject for change. In addition, the special attribute parent can be used to change the parent of the block. Simply put the name of the new parent block into the <extend> instruction, and the parent of the block that is referenced will be changed in the layout.

Syntax

NAME		VALUE
`name`	*	`block name` The name of any block to be extended.
`*`		`any other` Any other attribute specific for the <block> instruction.
`parent`		`block name` The name of the block that should become a new parent for the referenced block.
	*	Indicates a required value

Controlling Block Order

Sometimes more than one content element is assigned to the same structural block. For example, there might be several block that appear in a sidebar. You can control the order of blocks by including a “before” or “after” positioning property in the code. To place a block either before, or after a specific block, replace the hyphen with the block identifier, as shown in the following examples:

`before="-"` Places the block at the top of the sidebar, before other blocks.

`after="-"` Places the block at the bottom of the sidebar, after other blocks.

Code to Position Content Blocks

```
<block type="cms/block" before="-" name="left.permanent.callout">
<block type="cms/block" before="some-other-block"
name="left.permanent.callout">
<block type="cms/block" after="-" name="left.permanent.callout">
<block type="cms/block" after="some-other-block"
name="left.permanent.callout">
```

XML Load Sequence

For developers, it is important to understand that blocks and layout updates must be loaded in the correct order, in keeping with the rules of precedence and **load sequence**[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.

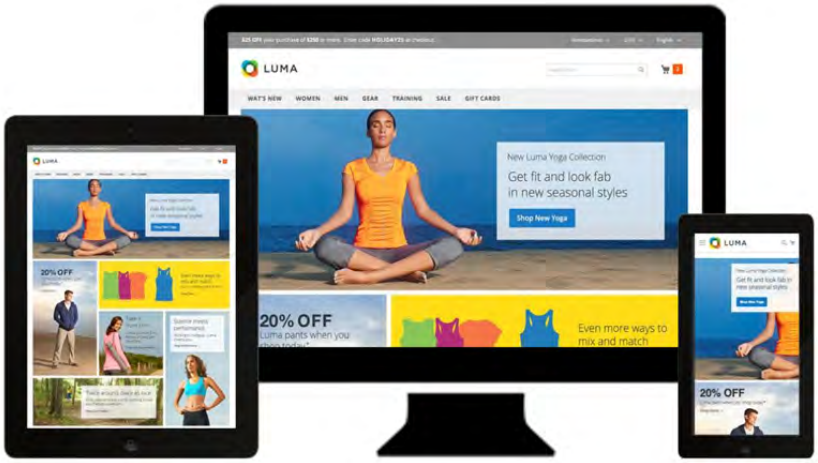
[2] In programming, a name used to reference an object.

Notes

CHAPTER 49:

Themes

Your store's theme is like window dressing that can be changed for a season or promotion. In this section of the guide, you will learn about page layouts, and how to apply a new theme to your store.



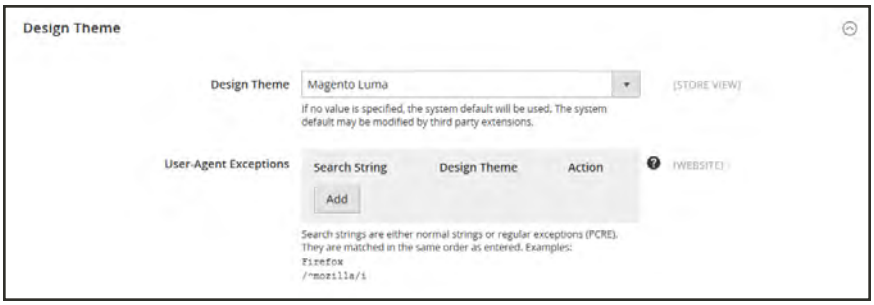
Responsive Luma Theme

A theme is a collection of files that determines the visual presentation of your store. Your Magento installation initially has two themes available; the Luma theme with sample data and a blank theme. Both are responsive themes that adjust the display for different devices. In addition, there is a growing selection of themes available "off the shelf" on Magento Connect and Marketplace. When you first install Magento Enterprise Edition 2.0, the design elements of the store are based on the theme that is designated as the "Default" theme.

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.

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. To learn more, see the Responsive Theme Developer's Guide.



Design Theme

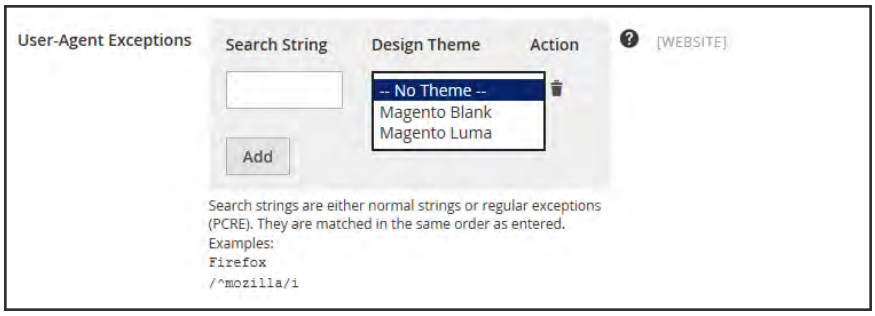
Some themes are designed to be used only with specific devices. When Magento detects a specific browser ID, or user agent, it uses the theme that is configured to be used for the specific browser. The search string can also include Perl-Compatible Regular Expressions (PCRE). To learn more, see: User Agent.

```
Firefox

/^mozilla/i
```

To view the default theme:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand the **Design Theme** section.
4. Set **Design Theme** to the theme that you want to apply to the store.
5. If the theme is to be used for only a specific device, do the following:
   a. Under **User-Agent Exceptions**, tap **Add**.
   b. In the **Search String** field, enter the browser ID for the specific device.

      Search strings are matched in the order they are entered.



User-Agent Exceptions

   c. Repeat the process to enter additional devices.
6. 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. You can modify the theme, add themes created by others, or create new ones. To learn more, see the Designer's Guide to Magento.

Magento Connect contains a wide selection of extensions that you can install to enhance the appearance of your store. The following example shows how to add a mobile theme from Magento Connect.

To install a new theme:

1. Go to Magento Connect.
2. In the upper-right corner, click to extend the **All Platforms** list, and choose **Enterprise**
3. You can browse through the available themes based on price or popularity, or do a keyword search. For more information, click the thumbnail of any theme.
4. To get the registration key, you must be a registered Magento Enterprise Edition 2.0 owner and be logged into your account. Then, click the **Install Now** button to get the license key.
5. To complete the process, follow the instructions to install an extension from Magento Connect.

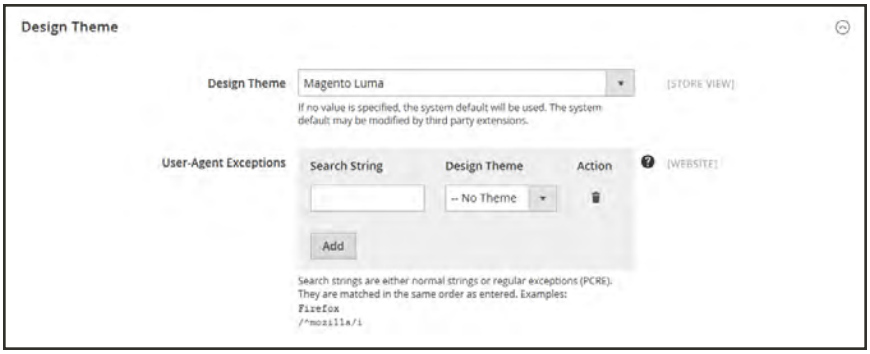
To activate the theme for your store:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand the **Design Theme** section. Then, do the following:

Design Theme

4. In the **Default** field, enter the name of the theme. The name of the theme for the demo store is "Magento Luma."
5. To use an alternate them for different browsers or devices, do the following:

a. Under User-Agent Exceptions, tap **Add**.



Add Exception

b. In the **Search String** field, enter the name of the browser or device that triggers the alternate theme. If there are multiple browsers, separate the name of each with a vertical bar. For example, because the mobile theme can be used with multiple devices, you can enter them all in the Search String field, as follows:

```
Android|Blackberry|Googlebot-Mobile|iPhone|iPod|mobi|Palm|Opera
Mini|Windows Mobile
```

c. Set **Design Theme** to the name of the theme that should be used for the exception. ”

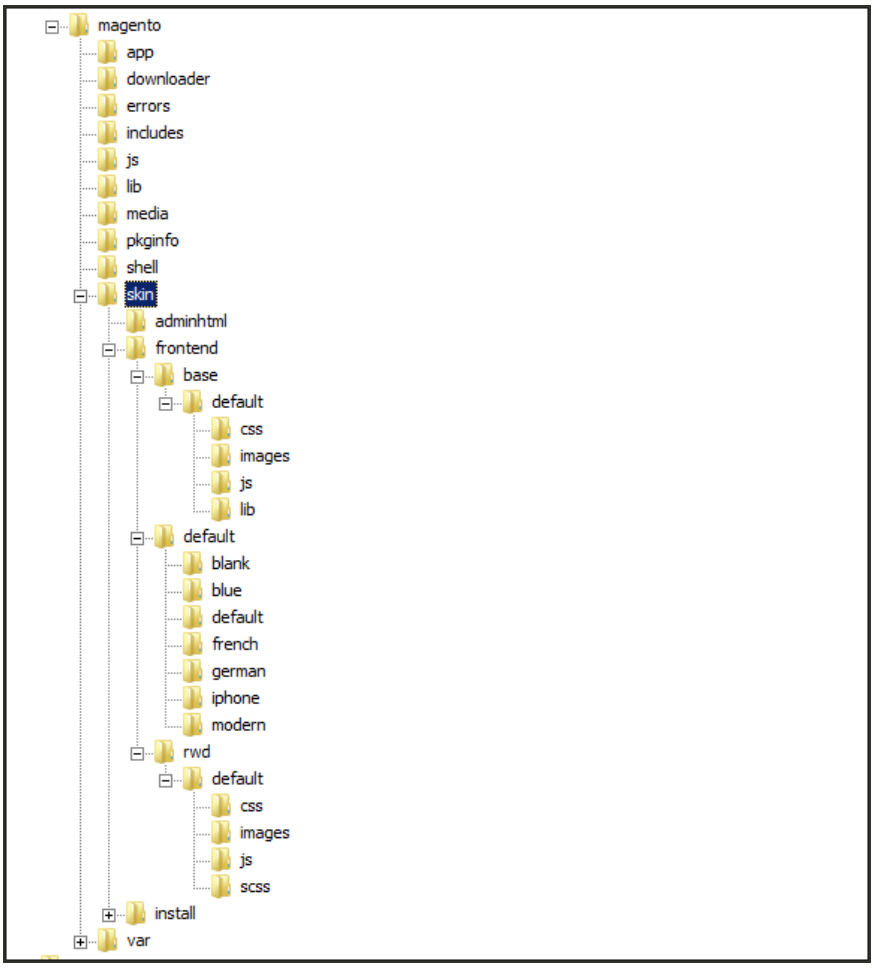
6. When complete, tap **Save Config** .

7. Test the new theme from your store. If you installed an exception for different browsers, view the store with each browser or device.

   If the new theme uses a different page layout than your current home page, you might need to change its page layout setting to match the theme.

Theme Assets

The assets associated with a theme are organized in the skin folder. JavaScript libraries which are shared across themes, are placed in the `js/` directory at the Magento root.



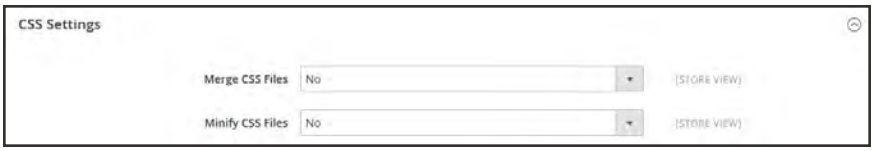
FILE TYPE	DESCRIPTION
CSS	Directory that contains the CSS files that control the visual styling that is associated with the skin. Location on server: `[magento]/skin/frontend/[designPackage]/[theme]/css`
Images	Directory that contains all images used by the theme, including buttons, background textures, and so on. Location on server: `[magento]/skin/frontend/[designPackage]/[theme]/images`
JS	Directory that contains theme-specific JavaScript routines and callable functions. Location on server: `[magento]/skin/frontend/[designPackage]/[theme]/ja`

Merging CSS Files

As part of an effort to optimize your site and reduce page load time, you can reduce the number of separate CSS files by merging them into a single condensed file. If you open a merged CSS file, you'll find one continuous stream of text, with line breaks removed. Because you can't edit the merged file, it's best to wait until you are out of the development mode, and no longer making frequent changes to the CSS.

To merge CSS files:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left under Advanced, select **Developer**.
2. Click to expand the **CSS Settings** section.



CSS Settings

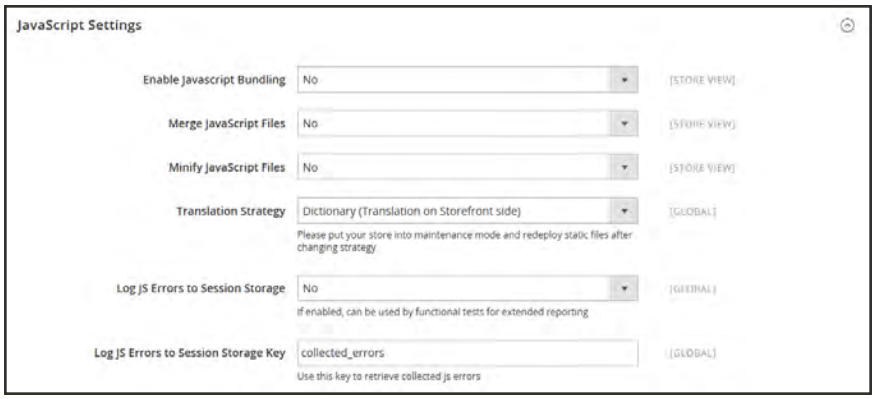
3. Set **Merge CSS Files** to "Yes."
4. When complete, click the **Save Config** button.

Merging Javascript Files

Multiple JavaScript files can be merged into a single, condensed file to reduce page load time. If you open a merged JavaScript file, you'll find one continuous stream of text, with line breaks removed. If you are finished with the development process, and the code contains no errors, you might consider merging the files.

To merge JavaScript files:

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left under **Advanced**, select **Developer**.
2. Click to expand the **JavaScript Settings** section.

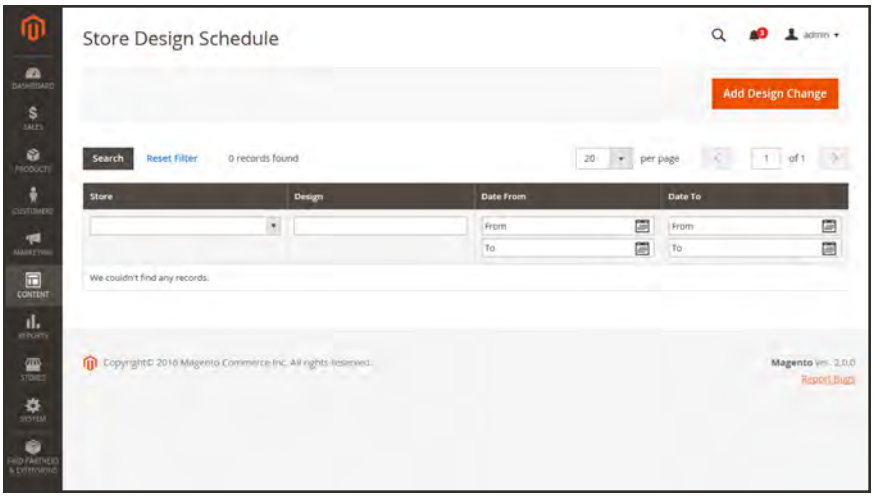


JavaScript Settings

3. Set **Merge JavaScript Files** to "Yes."
4. When complete, click the **Save Config** button.

Scheduling Design Changes

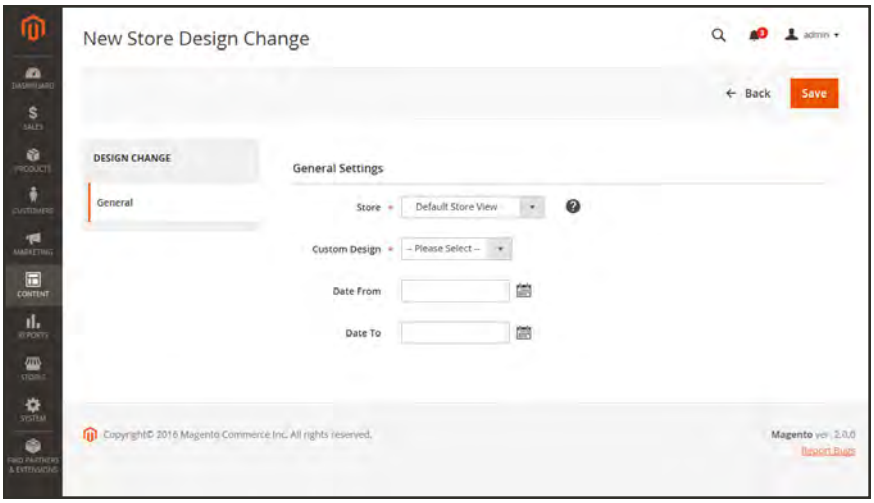
Design changes can be scheduled in advance, so they go into effect on schedule. You can use scheduled design changes for seasonal changes, promotions, or just to add variation.



Store Design Schedule

To schedule a design change:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Schedule**.
2. Tap **Add Design Change**. Then under General Settings, do the following:



New Design Change

a. Set **Store** to the view where the change applies.

b. Set **Custom Design** to the theme, or variation of a theme, that is to be used.

c. To define the period when the change is in effect, use the calendar to choose the values for the **Date From** and **Date To** fields.

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

Notes

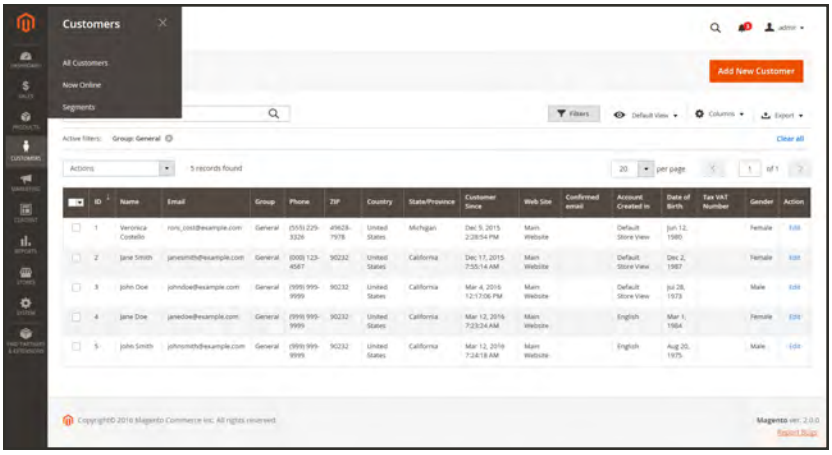
CUSTOMERS

Content

CHAPTER 50:

Customers Menu

The Customers menu provides access to customer account management tools, and gives you the ability to see who is currently online in your store.



Customers Menu

All Customers

Lists all customers who have registered for an account with your store, or were added by the administrator.

Now Online

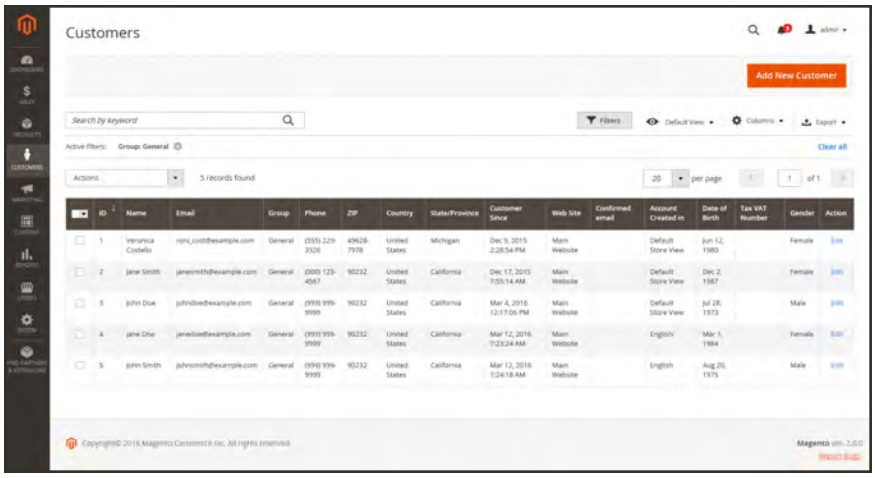
Lists all customers and visitors who are currently online in your store.

Segments

Dynamically display content and promotions to specific customers, based on properties such as customer address, order history, and shopping cart contents.

All Customers

The Customers grid lists all customers who have registered for an account with your store, or were added by the administrator.



All Customers

To view customer information:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Open any customer record in edit mode.
3. In the panel on the left, select the type of information you need to edit. Then, make the necessary changes.
4. When complete, tap **Save Customer**.

Now Online

The Now Online option on the Customers menu lists all customers and visitors who are currently in your store. Customer support representatives can use Online Now to help customers complete a purchase over the telephone. You can open the c ustomer's account, and examine the contents of the shopping cart, add items to the cart, apply coupons, and submit the order. The length of the online session is set in the configuration, and determines how long the customer's activity is visible from the Admin. By default, a customer's online session lasts fifteen minutes.

Online Customers

To see all customers who are online now:

1. On the Admin sidebar, tap **Customers**.
2. Choose **Online Now**.

   To learn more, see: Managing a Shopping Cart.

To configure the online session length:

1. On the Admin sidebar, tap **Stores**. Then under settings, choose **Online Now**.
2. In the panel on the left under **Customers**, select **Customer Configuration**.
3. Click to expand the **Online Customers Options** section.
4. In the **Online Minutes Interval** field, enter the number of minutes before an online expires. Leave the field empty to accept the default of fifteen minutes.

Online Customers Options

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

Column Descriptions

COLUMN	DESCRIPTION
ID	The customer ID of a registered customer.
First Name	The first name of a registered customer.
Last Name	The last name of a registered customer.
Email	The email address of a registered customer.
Last Activity	The date and time of the customer's last activity in yur store.
Type	Options include: Customer / Visitor

Notes

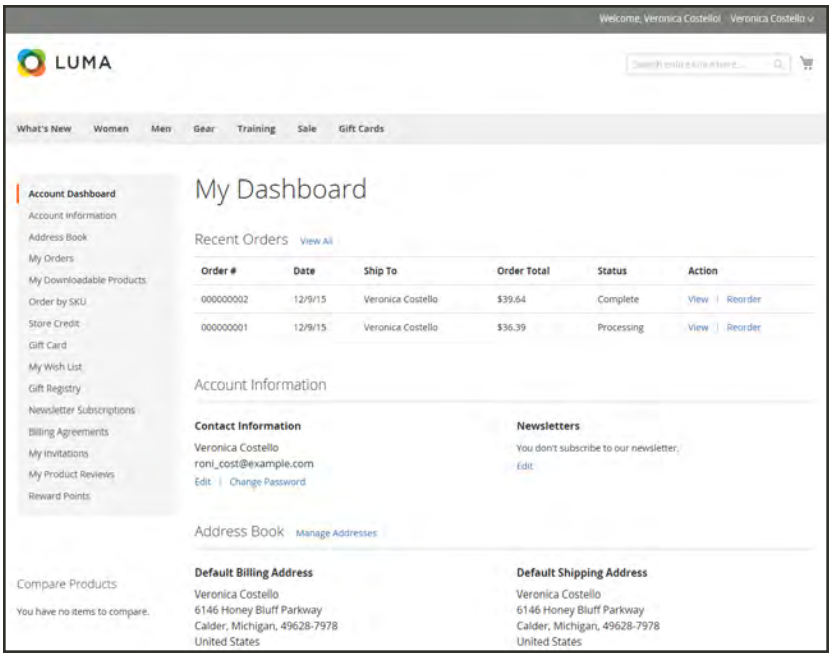
CHAPTER 51:

Customer Accounts

The header of every page in your store extends an invitation for shoppers to “Log in or register” for an account with your store. Customers who open an account with your store enjoy a range of benefits, including:

- **Faster checkout.** Registered customers move through checkout faster because much of the information is already in their accounts.
- **Self service.** Registered customers can update their information, check the status of orders, and even reorder from their account dashboard.

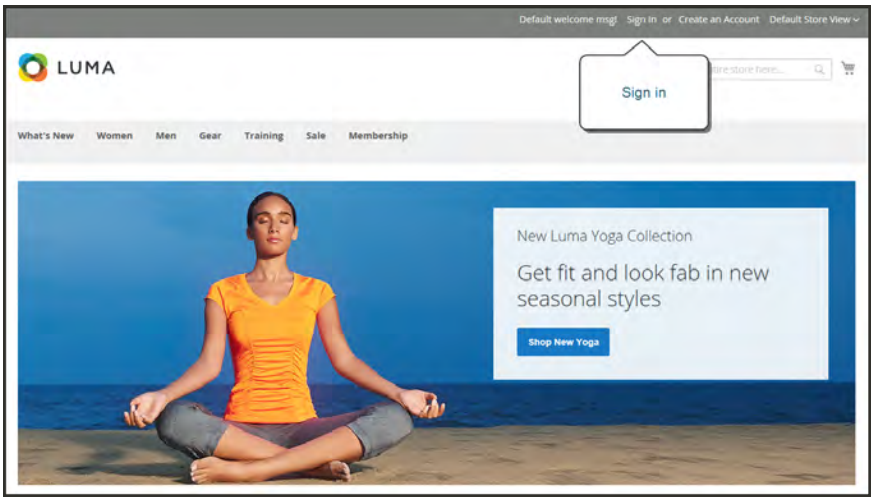
Customers can access their account dashboard by clicking the “My Account” link in the header of the store. They can use their account dashboard to view and modify their information, including past and current addresses, billing and shipping preferences, newsletter subscriptions, wishlist, and more.



Account Dashboard

Customer Sign In

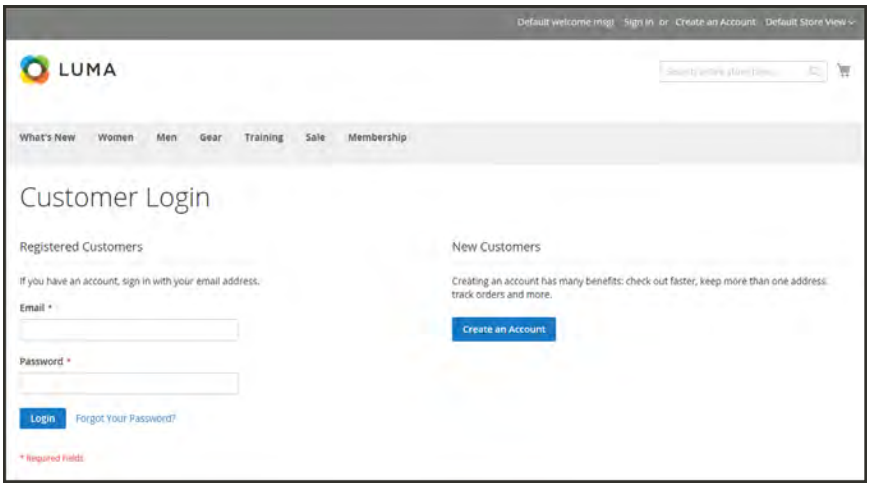
Customer have easy access to their accounts from every page in your store. Depending on the configuration, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts. When customers forget their passwords, a reset link is sent to the email address that is associated with the account.



Sign In

To sign in to your customer account:

1. In the header of the store, tap **Sign in**.
2. When prompted, enter the **Email Address** that is associated with your account, and your **Password**. Then,tap **Login**.



Customer Login

To reset your password:

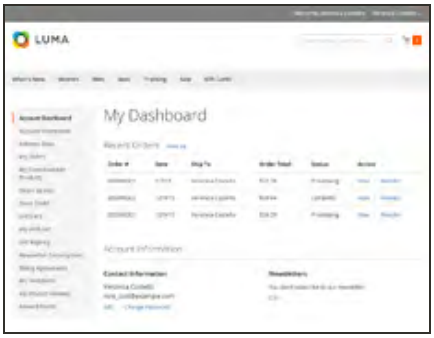
1. On the Login page, tap **Forgot Your Password?**.
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Submit**.

   If the email address you entered matches the one that is associated with the account, you will receive a "Password Reset Confirmation" email with a link to reset your password.
3. Tap the link in the email, and when prompted, enter your **New Password**. Enter it again to confirm, and tap **Reset Password**.

   > Your new password must be six or more characters in length, without spaces.

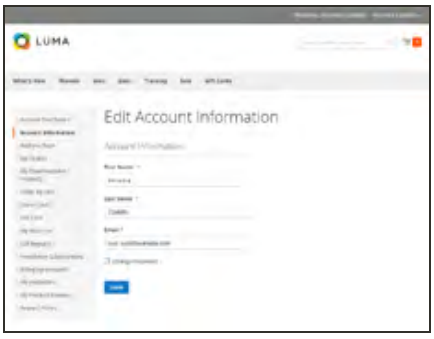
   When you receive confirmation that the password is updated, you can use the new password to log in to your account.

Account Dashboard



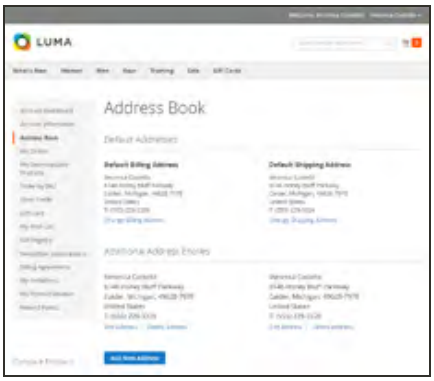
My Dashboard

The customer's account dashboard gives them the ability to track orders, manage shipping addresses, and manage other store activities.



Account Information

Customers can update their account information and change their password as needed.



Address Book

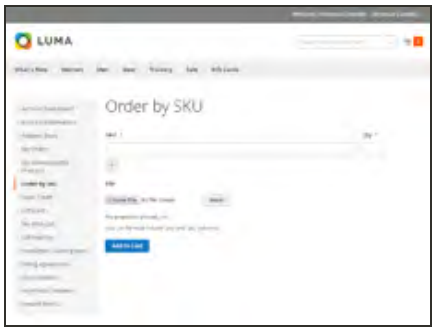
The customer address book includes the default billing and shipping address, and additional address entries.

My Orders

Displays a list of all customer orders, with a link to each. If enabled in the configuration, any order can be reordered by simply clicking the Reorder link.

My Downloadable Products

Lists all downloadable products the customer has purchased, with a link to each.

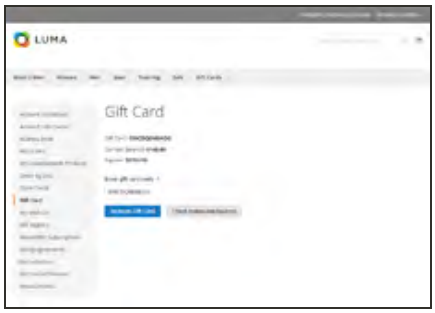


Order by SKU

Depending on the configuration, customers can order products individually by SKU, or upload multiple items from a CSV file.

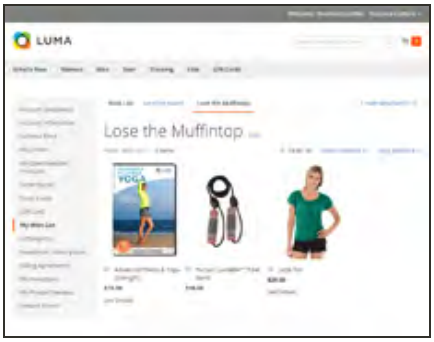
Store Credit

Displays the balance and history of the customer's store credit, and allows gift cards to be redeemed for store credit.



Gift Card

Allows customers to check the balance of their gift cards, and if enabled, redeem the balance for store credit.

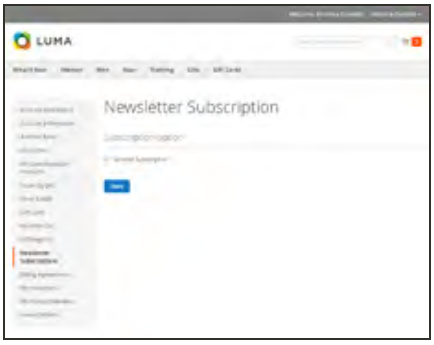


My Wish List

Customers can create and manage multiple wish lists from their account.

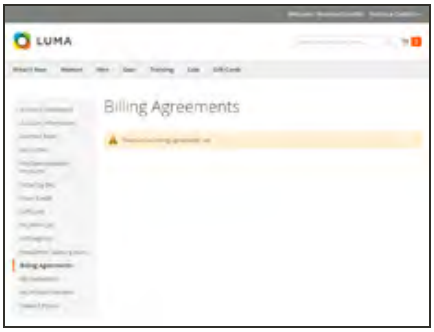
Gift Registry

Customers can create and manage multiple gift registries for various occasions from their account.



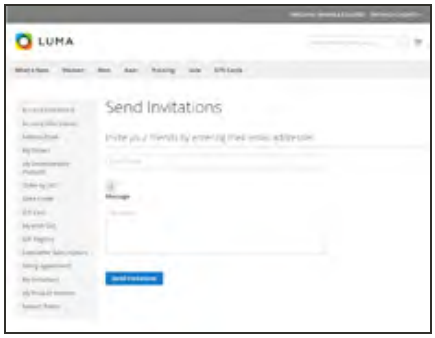
Newsletter Subscriptions

Lists all available newsletters. Those to which the customer is currently subscribed have a checkmark.



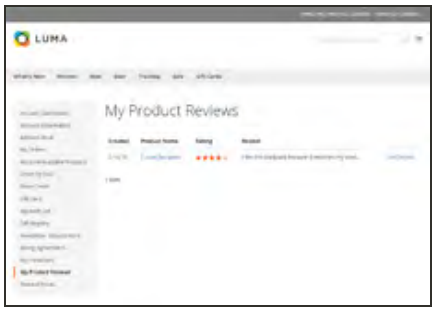
Billing Agreements

Displays a list of any customer billing agreements.



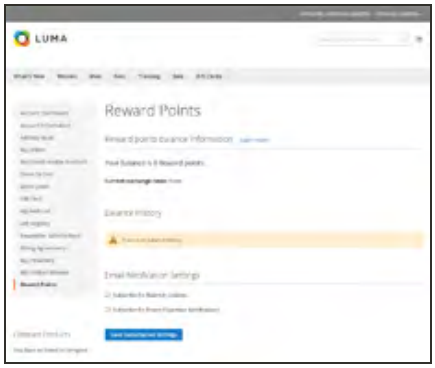
My Invitations

Customers can send invitations to store events from their account. The My Invitations page lists all invitations that have been sent, with the delivery status of each.



My Product Reviews

Lists all product reviews submitted by the customer, with a link to each.

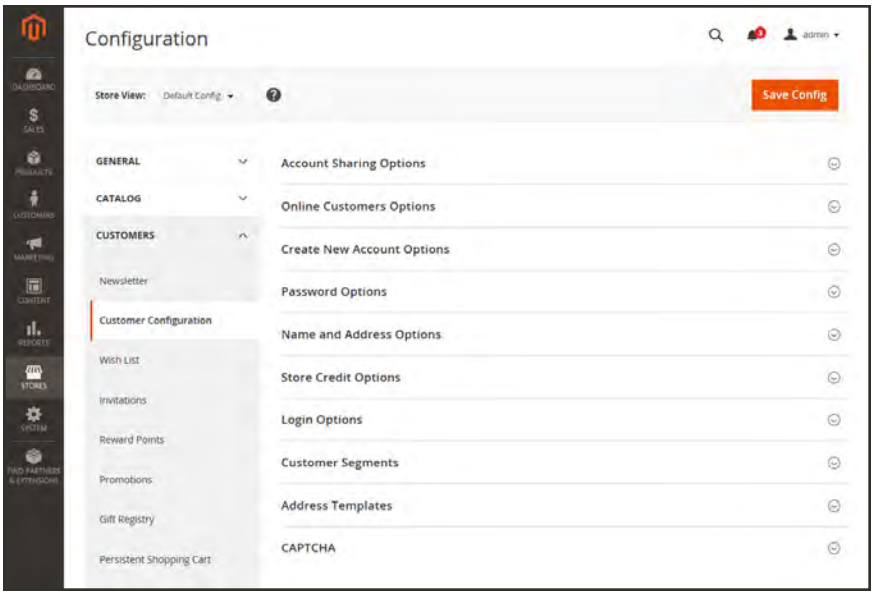


Reward Points

Shows the current balance of the customer's reward points, and a history of points earned and exchanged.

Configuring Customer Accounts

The customer account settings determine the information that you collect during customer registration, and the experience customers have during the process. Topics in this section include:



Customer Account Dashboard

Online Session Length

The length of each customer session is set by default to fifteen minutes. If there is no keyboard activity during that time, the current session ends, and customers must log back into their accounts to continue shopping. If Persistent Cart is enabled, the contents of their carts are saved for the next time they sign in to their accounts.

To configure the online session length:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Online Now**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand the **Online Customers Options** section.
4. In the **Online Minutes Interval** field, enter the number of minutes before the customer session. Leave the field empty to accept the default interval of fifteen minutes.

Online Customers Options

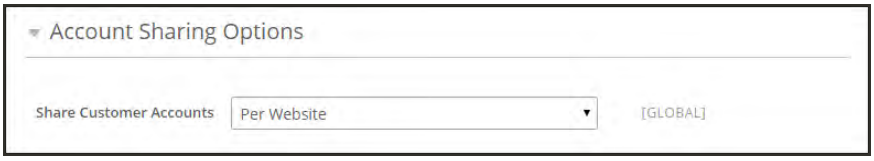
5. When complete, tap **Save Config**.

Account Scope

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

To set the scope of customer accounts:

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



Account Sharing Options

4. 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.

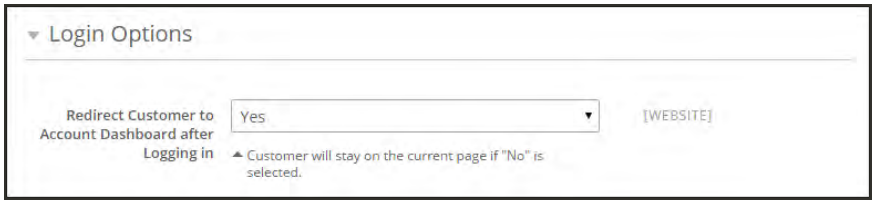
5. When complete, tap **Save Config**.

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.



Login Options

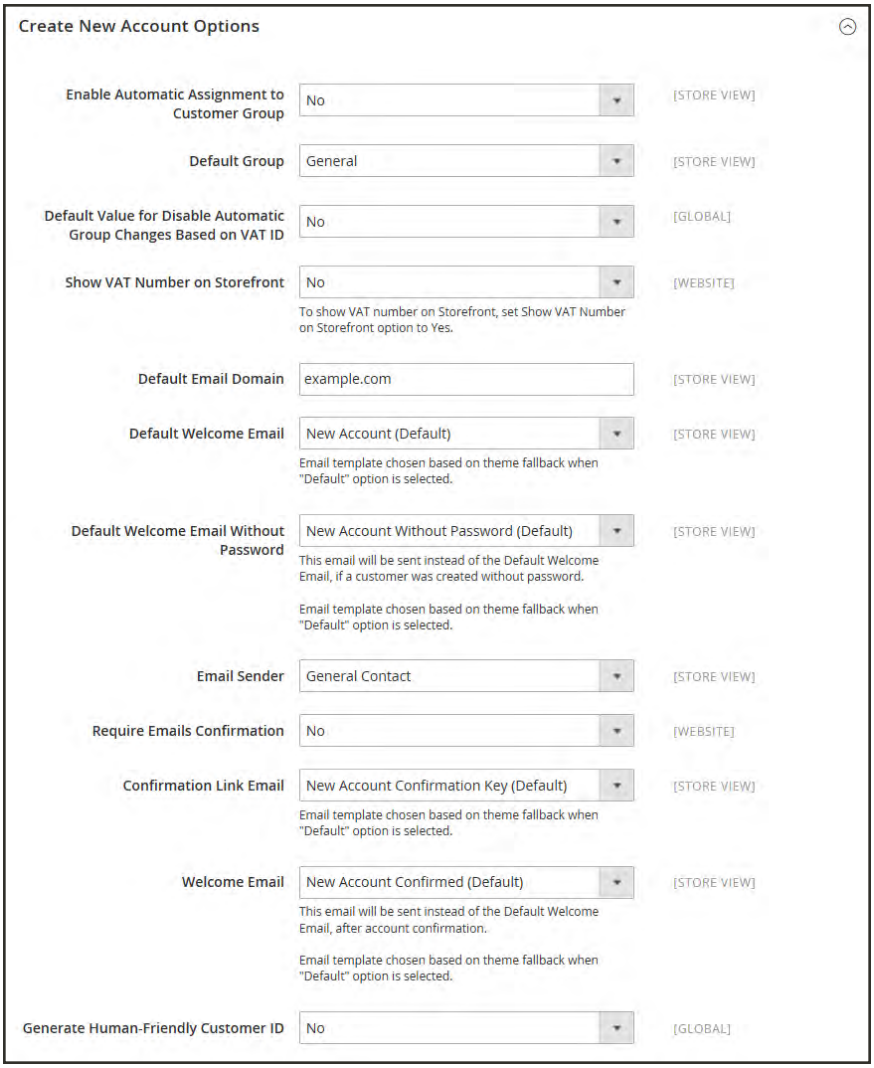
4. Set **Redirect Customer to Account Dashboard after Logging in** to one of the following:

Yes	The account dashboard appears when customers log in to their accounts.
No	Customers can continue shopping after logging in to their accounts.

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

New Account Options

In the Create New Account Options section of the configuration, the basic account options are combined with more advanced options that relate to VAT ID Validation and custom integrations. The following instructions cover only the most frequently used options. To learn about automatic customer group assignments, see: VAT Validation.



Create New Account Options

To set up the basic customer account options:

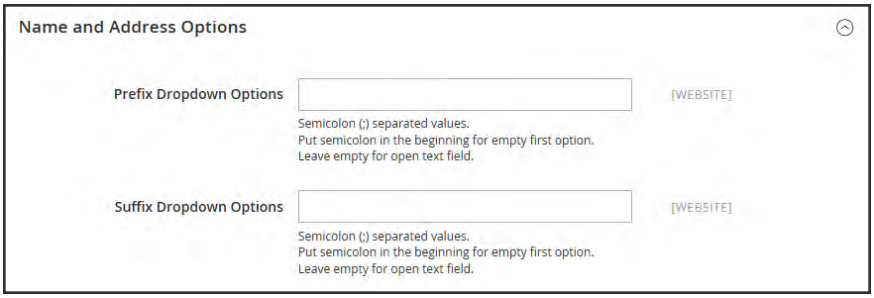
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand the **Create New Account Options** section. Then, do the following:
   a. Set **Default Group** to the customer group that is assigned to new customers when an account is created.
   a. If you have a Value Added Tax number, and want it to be visible to customers, set **Show VAT Number on Storefront** to "Yes."
   b. Enter the **Default Email Domain** for the store. For example: mystore.com
   c. Set **Default Welcome Email** to the template that is used for the Welcome email sent to new customers.
   d. Set **Default Welcome Email without Password** to the template that is used when a customer account is created that does not yet have a password. For example, a customer account created from the Admin does not yet have a password assigned.
   e. Set **Email Sender** to the store contact that appears as the sender of the Welcome email.
   f. To require that customers confirm their request to open an account with your store, set **Require Emails Confirmation** to "Yes." Then, set **Confirmation Link Email** to the template that is used for the confirmation email.
   g. Set **Welcome Email** to the template that is used for the Welcome message that is sent after the account is confirmed.
4. When complete, tap **Save Config**.

Name and Address Options

The Name and Address Options determine the values in the drop-down lists for the prefix and suffix part of the customer name. .

To configure the customer name and address:

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



Name and Address Options

4. Enter the **Number of Lines in a Street Address**. If left blank, the street address defaults to 2.
5. To include a prefix before the name, do the following:
   a. Set **Show Prefix** to one of the following:
      - Optional
      - Required
   b. In the **Prefix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.

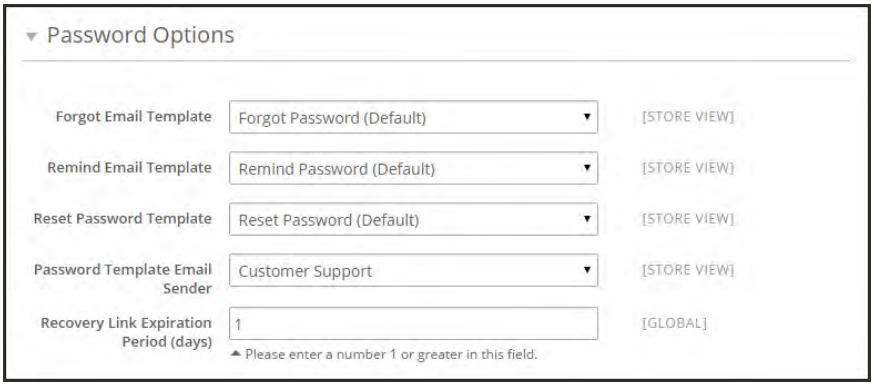
6. To include a suffix after the name, do the following:
   a. Set **Show Suffix** to one of the following:
      - Optional
      - Required
   b. In the **Suffix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
7. To include additional fields, do the following:
   a. Set **Show Date of Birth** to "Yes."
   b. Set **Show Tax/VAT Number** to "Yes."
   c. Set **Show Gender** to "Yes."
8. When complete, tap **Save Config**.

Password Options

The customer password options determine the email templates that are used when customers forget their passwords, 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**.
3. Expand the **Password Options** section. Then, do the following.



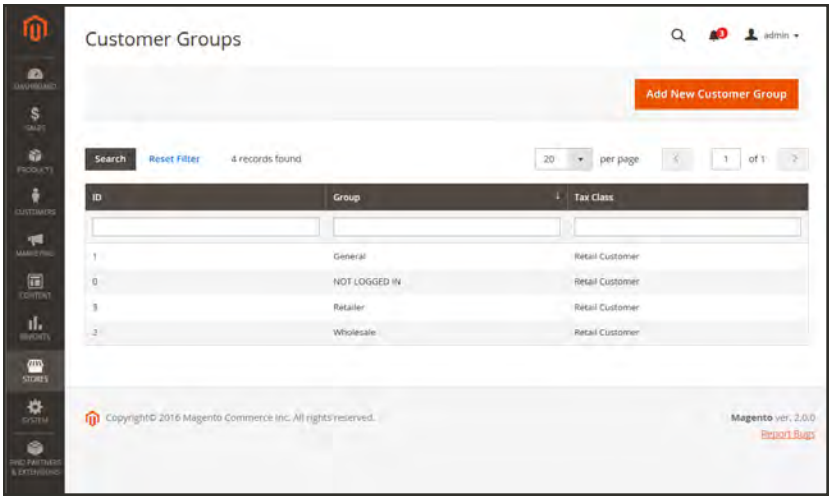
Password Options

   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 **Forgot and Remind Email Sender** to the store contact that appears as the sender of the Forgot Email and Remind Email notifications.
   d. In the **Recovery Link Expiration Period** field, enter the number of days before the password recovery link expires.
   e. To require that only the store administrator can change customer passwords, set **Require admin user to change user password** to "Yes."
4. When complete, tap **Save Config**.

CHAPTER 52:

Customer Groups

Customer groups determine which discounts are available, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.



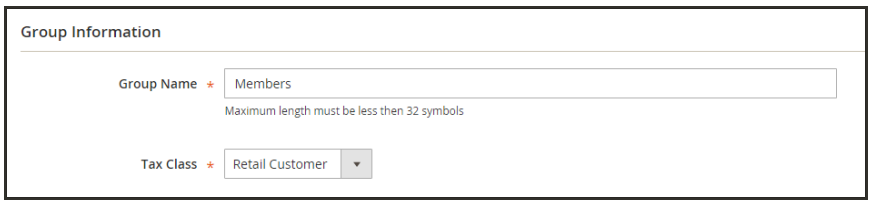
Customer Groups

Creating Customer Groups

To create a customer group, you simply assign the group a name and tax class.

To create a customer group:

1. On the Admin sidebar, tap **Stores**. Then under Other Settings, choose **Customer Groups**.
2. Tap **Add New Customer Group**. Then, do the following:
   a. Enter a unique **Group Name** less than 32 characters to identify the group.
   b. Select the **Tax Class** that applies to the group.



Group Information

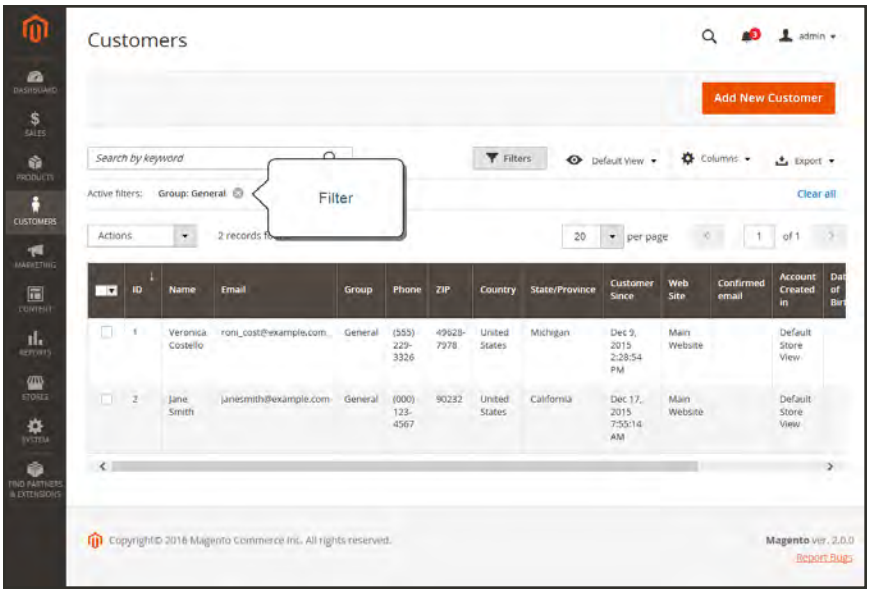
3. When complete, tap **Save Customer Group**.

To edit a customer group:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, 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 complete, tap **Submit**.



Filter Customers by Group

Notes

SALES

Point of Purchase

The cart is positioned at the end of the path to purchase, at the intersection of “Buy” and “Abandon.” It is perhaps, the most important page in the store. Learn how to configure the shopping cart and offer assistance to your customers.

Order Management

In this section of the guide, you’ll learn how to fulfill orders and manage returns.

Payments

Learn how to set up the payment methods and services that you want to offer your customers.

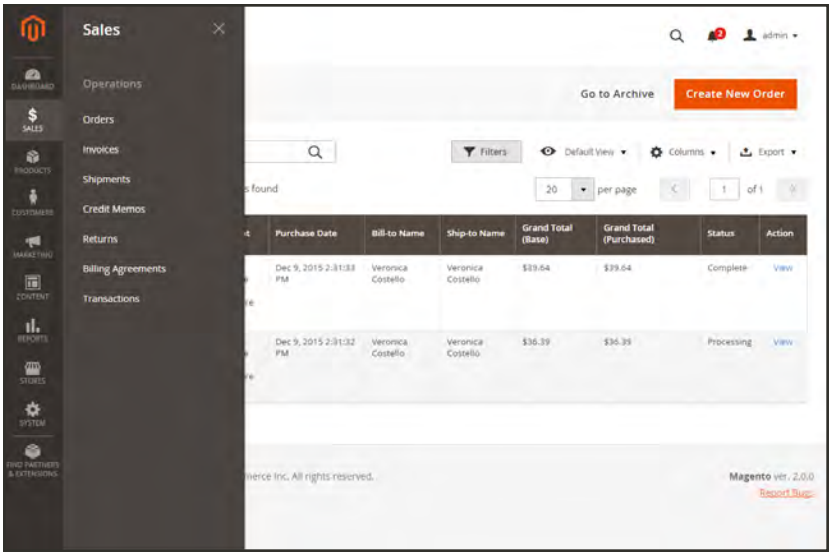
Shipping

Learn how to set up a variety of shipping methods and carriers, and print shipping labels.

CHAPTER 53:

Sales Menu

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of option as a different stage in the lifetime of an order.



Sales Menu

Menu Options

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

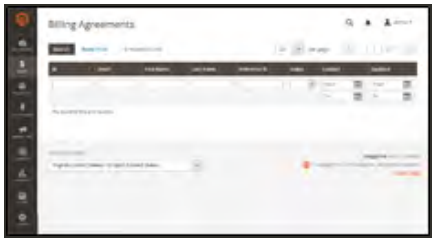
A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.

Credit Memos

A credit memo is a document that shows the amount that is owed to the customer. The amount can be applied toward a purchase, or refunded to the customer.

Returns

A return merchandise authorization (RMA) can be granted to customers who request to return a product for a refund or replacement. If approved, an RMA number is assigned to identify the returned product. If the product is not replaced, either a credit memo can be issued, or the amount refunded to the customer.



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.

Notes

Point of Purchase

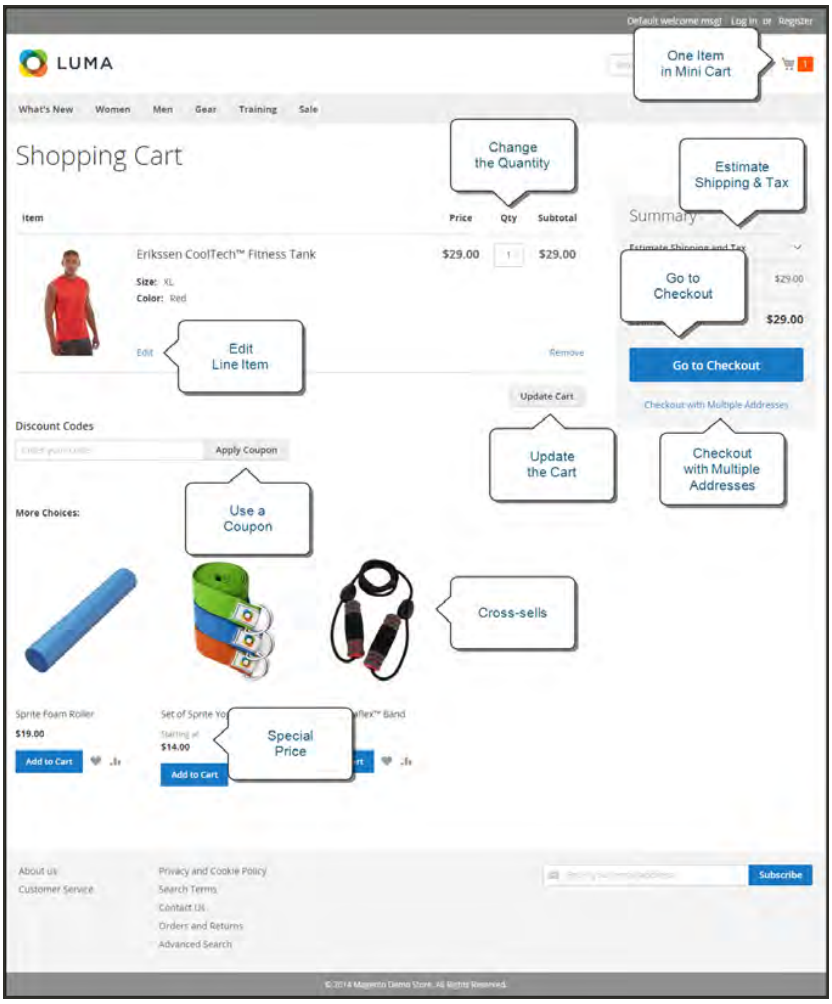
In this section of the guide, you'll learn how to configure the cart and checkout options, and offer assistance to your customers.

Contents

CHAPTER 54:

Cart

The cart is positioned at the end of the path to purchase, at the intersection of “Buy” and “Abandon,” and is perhaps, the most important page in the store. The cart is where the order total is calculated, along with discount coupons and estimated shipping and tax. It’s a great place to show your trust badges and seals, and an ideal opportunity to offer one last item. You can choose the items to be offered as a cross-sell impulse purchase whenever a specific item appears in the cart.



Shopping Cart

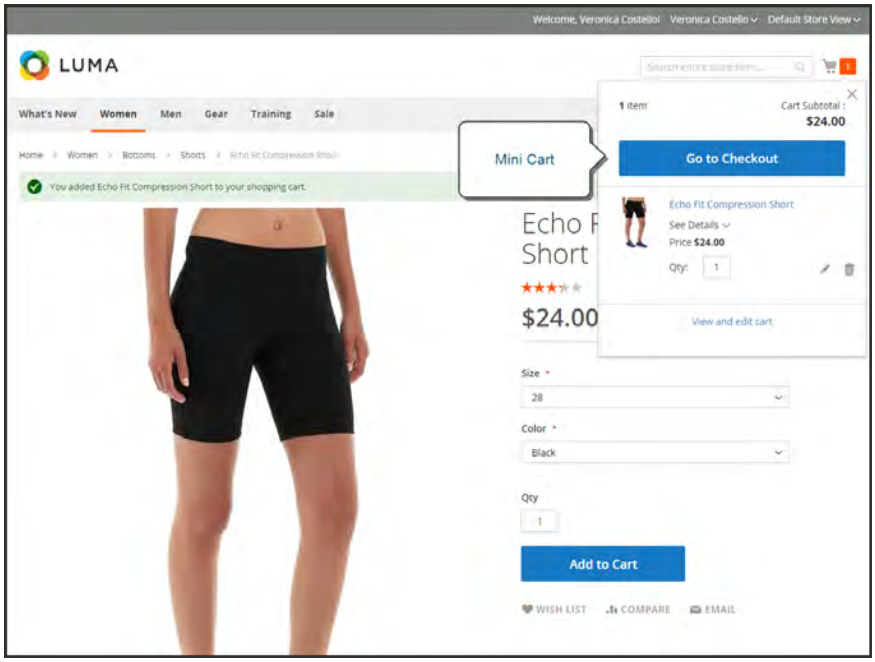
Cart Configuration

The cart configuration determines the when the customer is redirected to the cart page, and which images are used for product thumbnails. You can require an order to reach a minimum amount before the checkout process begins, specify the number of days a quoted prices remain valid, and control the order of items in the Totals section. Topics include:

- Cart Sidebar
- Redirect to Cart
- Quote Lifetime
- Minimum Order Amount
- Cart Thumbnails

Cart Sidebar

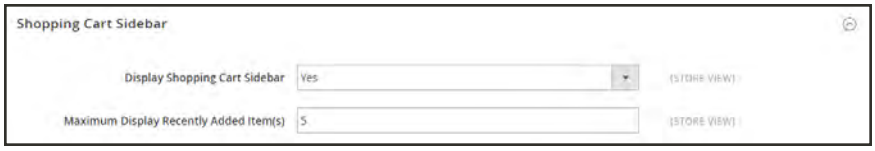
The Shopping Cart Sidebar is often called the "mini cart," and displays a summary of the items in the cart. It is enabled by default, and appears when you click the number of items in the Cart Link.



Mini Cart

To configure the mini cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart Sidebar** section. Then, do the following:



Shopping Cart Sidebar

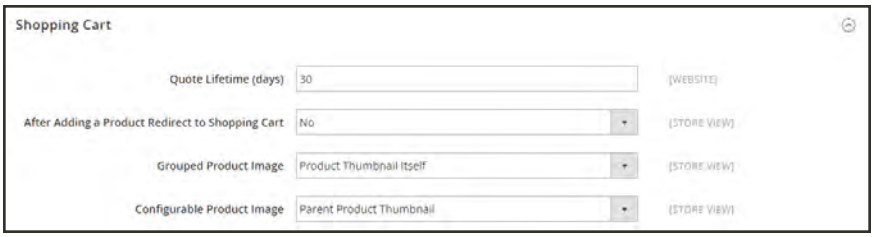
   a. Set **Display Shopping Cart Sidebar** to your preference.
   b. In the **Maximum Display Recently Added Item(s)** field, enter the maximum number of recently added items that you want to appear in the mini cart.
4. When complete, tap **Save Config.**

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 sibebar, 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**.



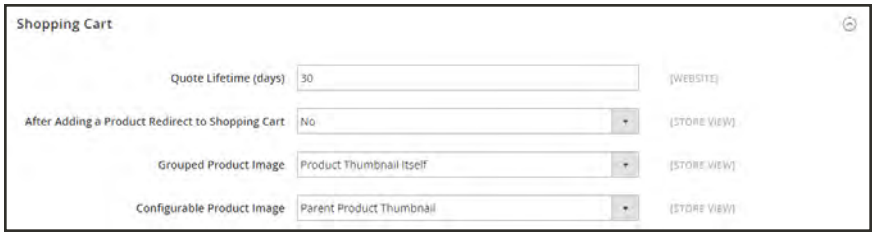
Redirect to Cart

Quote Lifetime

You can determine how long a price is valid by setting the cart quote lifetime in the configuration. For example, if a shopper leaves a cart unattended after several days, the quotes price for some items might no longer be the same. By default, the quote lifetime is set to thirty days.

To configure the quote lifetime:

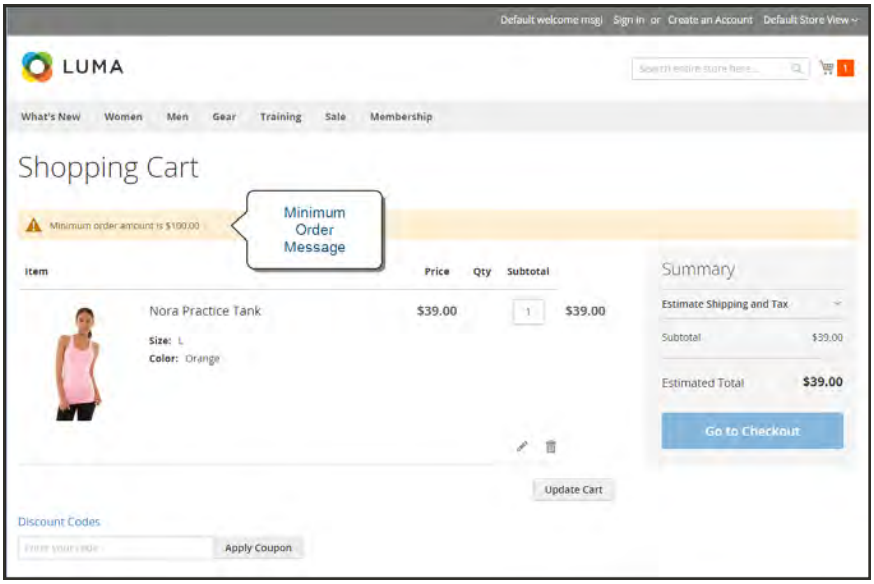
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart** section.
4. In the **Quote Lifetime (days)** field, enter the number of days that a quoted price remains valid.
5. When complete, tap **Save Config**.



Shopping Cart

Minimum Order Amount

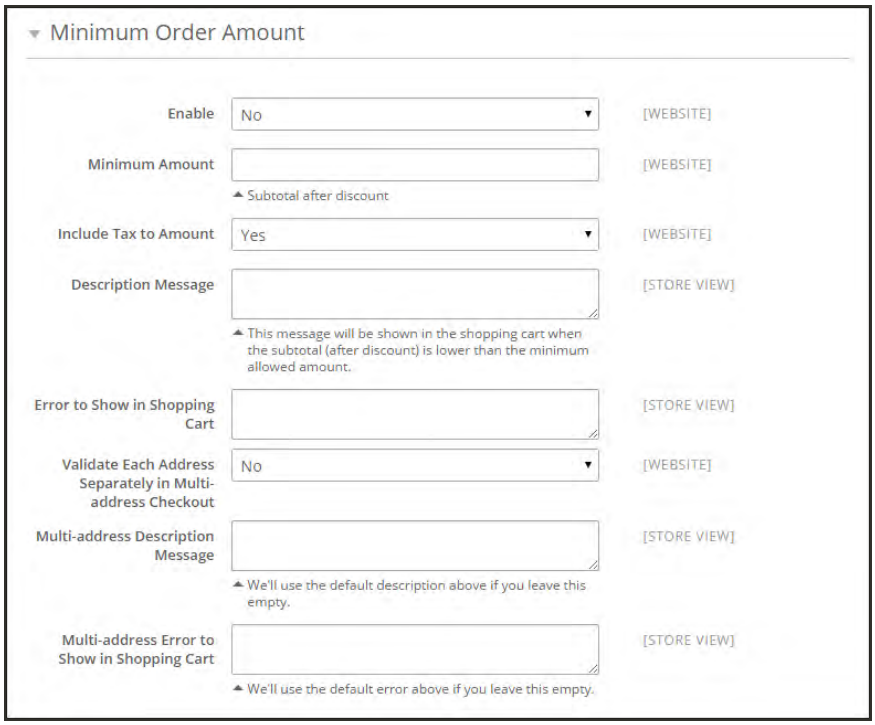
The configuration allows you to specify a minimum amount, after discounts are applied, that order subtotals are required to meet. Orders shipped to multiple address can be required to meet the minimum order amount per address. The Checkout button becomes available only after the minimum order amount is reached.



Minimum Order Message in Cart

To configure a minimum order amount:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand the **Minimum Order Amount** section. Then, do the following:



Minimum Order Amount

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. To change the default message that appears at the top of the cart, enter the text in the **Description Message** box. Leave the box blank to use the default message.

d. To change the default error message, enter the text in the **Error to Show in Shopping Cart** box.

e. 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."

f. 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.

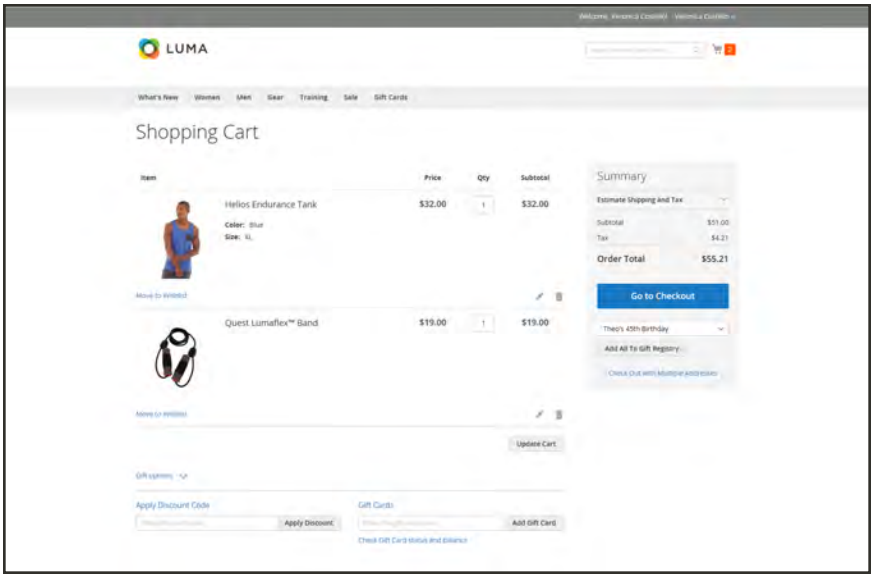
g. To change the default error message for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Error to Show in Shopping Cart** box.

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

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.

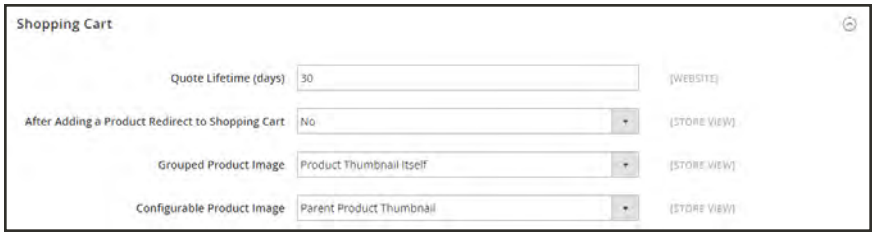
The thumbnail image for both grouped and configurable products can be set to display the image from either the “parent” product or from the product variation. The setting applies to all grouped or configurable products in the current store view.



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:

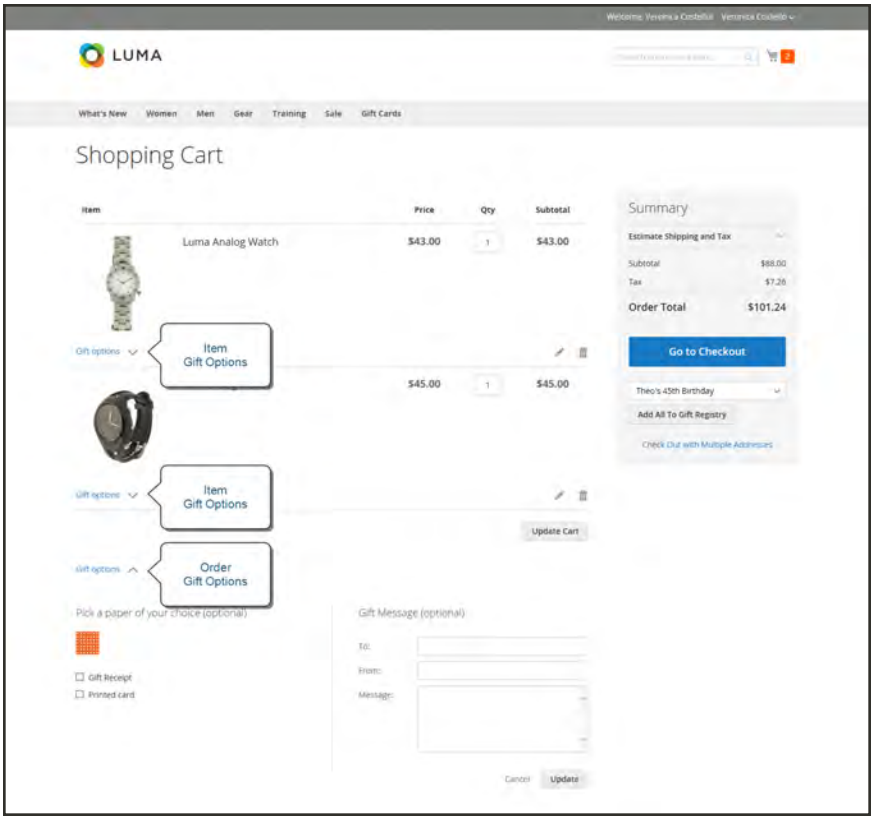


Shopping Cart

   a. Set **Grouped Product Image** to one of the following:
      - Product Thumbnail Itself
      - Parent Product Thumbnail
   b. Set **Configurable Product Image** to one of the following:
      - Product Thumbnail Itself
      - Parent Product Thumbnail
4. When complete, tap **Save Config**.

Gift Options

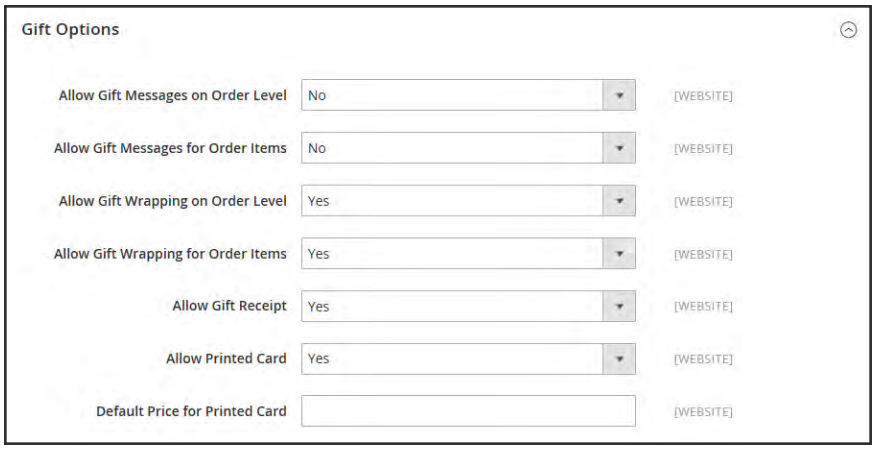
The selection of available gift options appears in the cart before the checkout process begins. The Gift Options configuration determines if customers can add a gift message or greeting card, and the gift wrapping that are available. Each item in the order can have separate gift wrapping and message. When applied to the entire order, a gift receipt and greeting card can be added, as well. The Gift Options configuration applies to the entire website, but can be overridden at the product level.



Gift Options

To enable gift options:

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



Gift Options

a. Set the **Gift Message** options according to your preference:

- Allow Gift Messages on Order Level
- Allow Gift Messages for Order Items

b. Set the **Gift Wrapping** options according to your preference:

- Allow Gift Wrapping on Order Level
- Allow Gift Wrapping for Order Items

c. To give customers the option to include a gift receipt with their orders, set **Allow Gift Receipt** to "Yes."

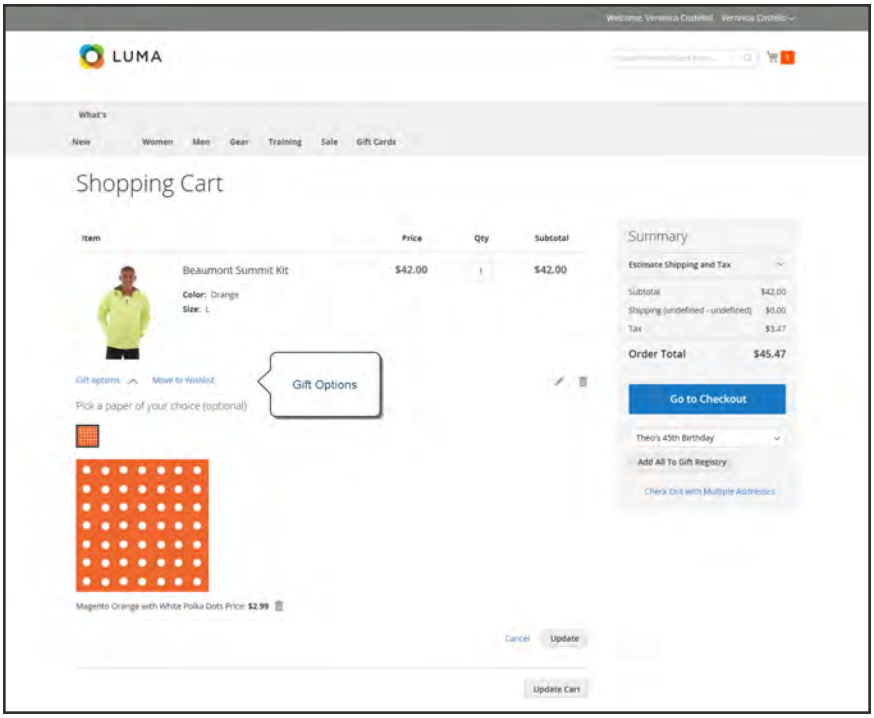
d. To give customers the option to include a printed card with their orders, set **Allow Printed Card** to "Yes." Then, enter the **Default Price for Printed Card**.

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

Gift Wrap

Gift wrapping is available for any product that can be shipped, and can be offered for individual items or for the entire order. You can charge a separate price for each gift wrap design, and upload a thumbnail image of the design that appears as an option for the product in the cart. When the gift wrap thumbnail is clicked, a full-size image appears. During checkout review, the gift wrap charge appears with the other checkout totals in the Order Summary section.

The gift wrap image should be a swatch that shows the repeating pattern, and can also include a sample of the ribbon that is to be used. You can either scan the paper, or take a photograph of a wrapped package. The uploaded image can be GIF, JPG, or PNG image, and should be square. .In the following example, the uploaded gift wrap image is 230 x 230 pixels.



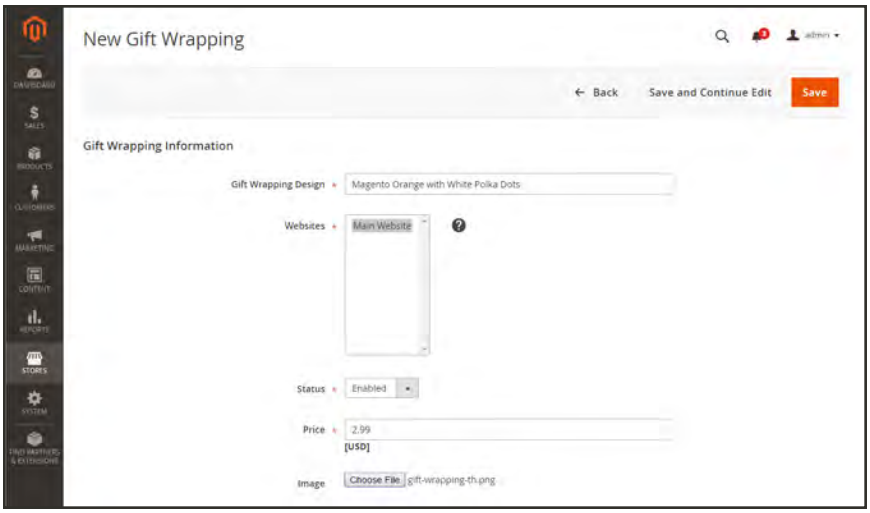
Gift Options in Cart

To add a new gift wrap design:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Wrapping**.

Gift Wrapping

2. In the upper-right corner, tap **Add Gift Wrapping**. Then, do the following:



New Gift Wrapping

   a. Enter the name for the **Gift Wrapping Design** to appear during checkout.

   b. Select the **Websites** where the gift wrap design will be available.

   c. Set **Status** to "Enabled."

   d. Enter the **Price** of the gift wrap design.

   e. To upload a thumbnail **Image** of the gift wrapping, tap **Choose File**. Then, select the file to upload from your directory. A thumbnail of the image appears in the Gift Wrapping Information after the record is saved.

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

To edit a gift wrap design:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Wrapping**.
2. Find the gift wrap record in the list. Then in the Action column, click **Edit**.

Edit Gift Wrapping Information

3. Make the necessary changes.
4. When complete, tap **Save**.

To delete gift wrap designs:

Method 1: Delete Single Gift Wrap Design

1. Open the gift wrapping design in edit mode.
2. At the top of the workspace, tap **Delete**. Then when prompted, tap **OK** to confirm.

Method 2: Delete Multiple Gift Wrap Designs

1. In the Gift Wrapping grid, mark the checkbox of each gift wrap design that you want to delete.
2. Set the **Actions** control to “Delete.”
3. Tap **Submit**.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Gift Wrapping Design	Store View	The name of the gift wrap option that appears to customers during checkout. The name can be different for each store view.
Websites		Select the websites where the new gift wrap will be available.
Status	Global	Determines if gift wrapping is available. Options: Enabled / Disabled.
Price	Global	Specifies the price of the gift wrap option. This setting can be overridden by the gift wrap price set at the product level.
Image	Global	Uploads a thumbnail image of the gift wrap design that appears next to the gift wrap option.

Managing Tax for Gift Options

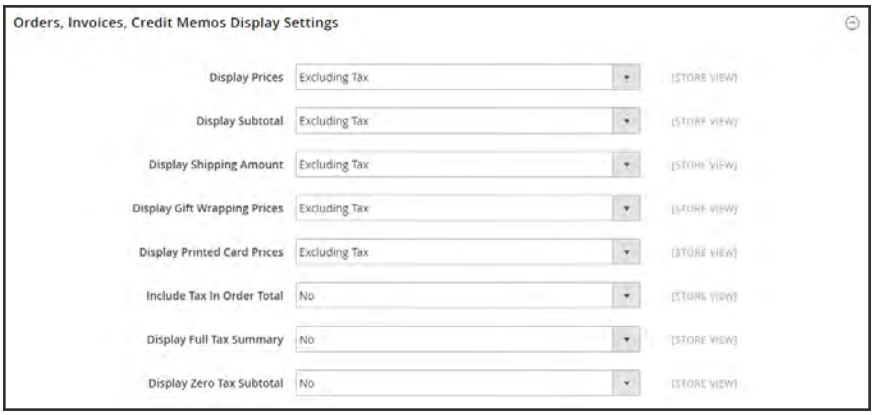
Gift wrapping and printed gift card prices can be configured to include or exclude tax, or to display both options. You can also specify a tax class for these items, at either the global or website level.

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.

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 the their shopping carts.

Yes A persistent cookie is created, and the contents of the shopping cart is saved for the customer’s next logged-in session.

No If “Remember Me” is not selected or is cleared, a persistent cookie is not created, and the cart information is not saved for the customer’s next logged-in session.

Continue Persistence After Logout (No)

No When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.

No When the customer logs out, the session cookie is deleted, but the persistent cookie remains in effect. The next time the customer logs in, the cart items are restored, or added to any new items that have been placed in the cart.

No If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

Clear Persistence on Logout (Yes)

Yes When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.

Yes When the customer logs out, both cookies are deleted.

Yes If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

Persistent Cart Settings and Effects

SETTINGS	EFFECT
Enable Remember Me = “No” Clear Persistence on Log Out = any value	The Remember Me checkbox is not available on the login and registration page. The persistent cookie is not used.
Enable Remember Me = “Yes” Clear Persistence on Log Out = any value Remember Me (not selected)	The session cookie is applied as usual; the persistent cookie is not used.
Enable Remember Me = “Yes” Clear Persistence on Log Out = “Yes” Remember Me = “Yes”	When a customer logs in, both cookies are applied. When a customer logs out, both cookies are deleted. If a customer does not log in, but the session cookie expires, the persistent cookie is still used. Apart from logging out, the persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.
Enable Remember Me = “Yes” Clear Persistence on Log Out = “No” Remember Me = “Yes”	When a customer logs in, both cookies are applied. When a customer logs out, the session cookie is deleted, the persistent session continues. The persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.

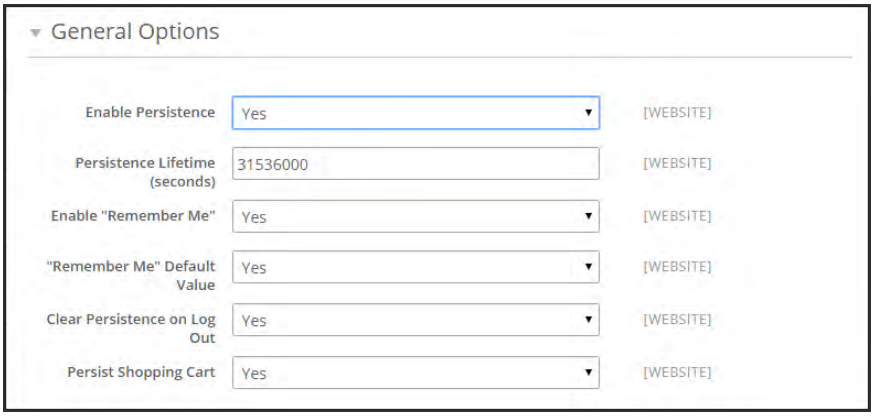
Configuring a Persistent Cart

During the setup of a persistent shopping cart, you can specify the lifetime of the cookies, and which options you want to make available for various customer activities.

> If the session cookie expires while the customer is logged in, the persistent cookie remains active.

To configure a persistent cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
1. Then in the panel on the left, under **Customers**, choose **Persistent Shopping Cart**.
2. Expand the **General Options** section:
3. To enable the persistent shopping cart and display additional options, set **Enable Persistence** to "Yes."



General Options

4. Do the following:
   a. In the **Persistence Lifetime (seconds)** field, enter the length of time, in seconds, that you want the persistent cookie to last. The default value of 31,536,000 seconds is equal to one year, and is the maximum time allowed.
   b. Set **Enable "Remember Me"** to one of the following:

Yes	Displays the "Remember Me" checkbox on the Login page of your store, so customers can choose to save their shopping cart information.
No	Persistence can still be enabled, but customers are not given the option to choose if they want to save their information.

c. To preselect the “Remember Me” checkbox, set **Remember Me Default Value** to “Yes.”

d. Set **Clear Persistence on Log Out** to one of the following:

Yes	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**.

Notes

CHAPTER 55:

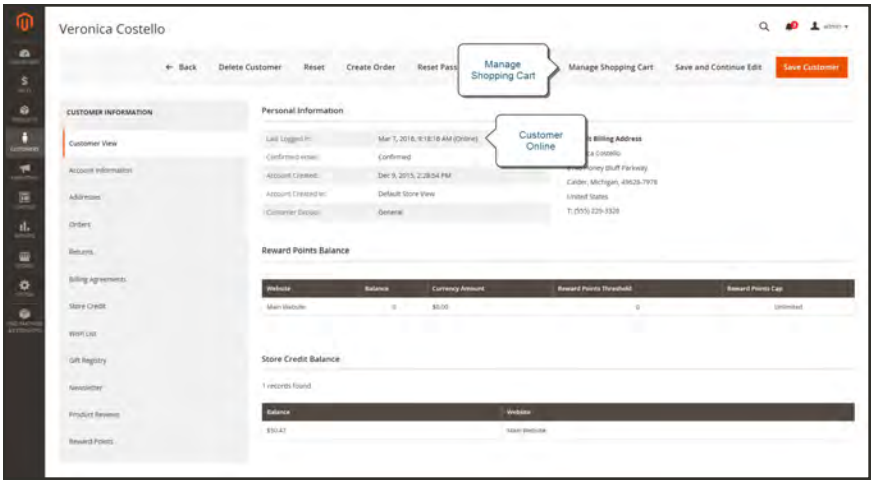
Shopping Assistance

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. While you're on the phone, the customer might decides to take advantage of a coupon. To complete the sale, you must know how to edit the contents of the shopping cart, apply the discount from the coupon, and complete the order from the Admin—all while the customer is on the phone. No problem!

You can offer immediate shopping cart assistance to any customer who has registered for an account with your store. The Manage Shopping Cart tool gives you the ability to edit the contents of the customer's shopping cart in real time, from the Admin of your store. Customer Service reps can see the contents of a customer's shopping cart while the customer is on the phone, and the changes can be seen by the customer immediately after the page is refreshed.

Managing a Shopping Cart

Store administrators can manage the shopping carts of customers who are now online, and also access the persistent carts of shoppers who are not currently logged in to their accounts. You can add and remove products, transfer items from customer activities, and create an order. When managing the cart of a customer who is online, the customer must refresh the browser to see any changes.



Manage Shopping Cart

Process Overview:

Step 1: Open the Shopping Cart

Step 2: Add Selections to the Cart

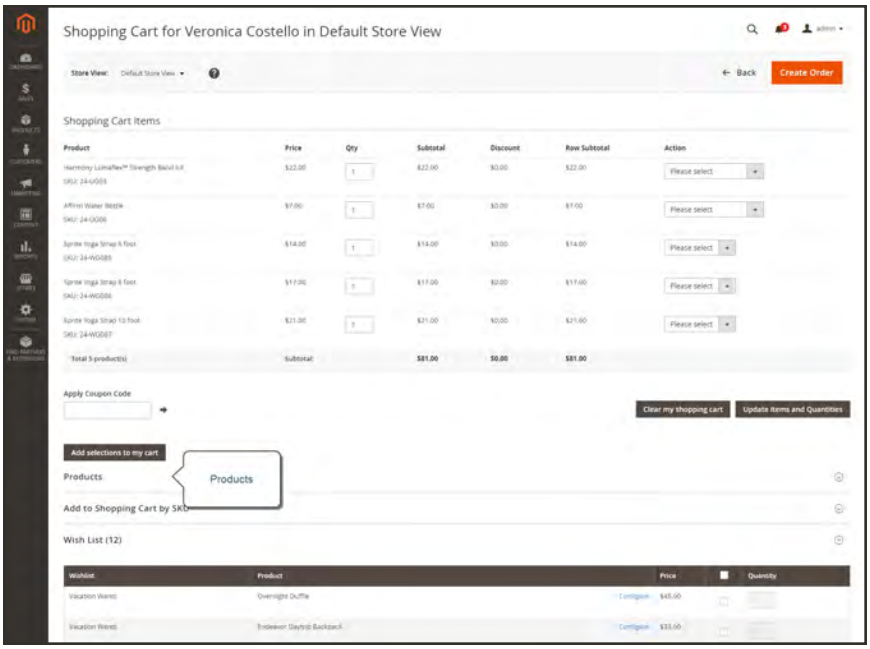
Step 3: Apply a Coupon Code

Step 4: Complete Any Necessary Housekeeping Actions

Step 5: Review and Create the Order

Step 1: Open the Shopping Cart

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer account in the grid, and click **Edit**.
3. Tap **Manage Shopping Cart** to display the contents of the c ustomer's cart.



Shopping Cart of Offline Customer

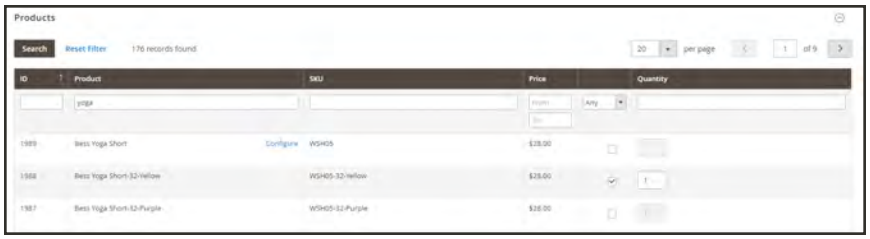
Step 2: Add Selections to the Cart

You can use any of the following methods to add products to the cart, and expand or collapse each section as need. If your customer has any wish lists, that section will open automatically.

Collapsed Product Selection Sections

Method 1: Add Products from Catalog

1. Expand the **Products** section.



Products

2. If necessary, tap **Reset Filter** to list all products in the catalog. Then, do the following:
   a. Use the filter controls as needed to find the products to be added.
   b. Tap **Search**.
   c. Mark the checkbox of each product to be added to the cart.
   d. For a configurable product, choose the product options, and tap **OK**.
   e. Enter the **Quantity** to be purchased.
3. Tap **Add selections to my cart**.
4. To close the Products section, tap **Collapse**.

Method 2: Add Products by SKU

1. Expand the **Add to Shopping Cart by SKU** section.

Add to Shopping Cart by SKU

2. To enter individual SKUs, do the following:
   a. Enter the **SKU number** to be added to the order. Then, enter the **Qty**.
   b. To enter another SKU, tap **Add another**, and repeat as many times as needed.
3. To import a list of SKUs, 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.

4. When complete, tap **Add selections to my cart**.
5. To close the Add to Shopping Cart by SKU section, tap **Collapse**.

Method 3: Add Products from Current Activities

The process to add products to the cart is essentially the same for each section.

1. Expand the section with the item(s) to add.
2. If necessary, tap **Reset Filter** to list all products in the catalog. Then, do the following:
   a. Use the filter controls as needed to find the products to be added.
   b. Tap **Search**.
   c. Mark the checkbox of each product to be added to the cart.
   d. If prompted to complete the options for a configurable product, choose each product option, and enter the Quantity to be purchased. Then, tap **OK**.
3. Tap **Add selections to my cart**.

   The items appear in the Items Ordered section at the top of the page.
4. To close the section, tap **Collapse**.

Step 3: Apply a Coupon Code

If the customer has a coupon, the store administrator can enter the coupon code for the customer. In this example, the store has a coupon code that can be used at the discretion of the store administrator to apply a 10% discount to the order. The applied discount appears in the Discount column.

1. Enter the coupon code in the **Apply Coupon Code** field.

Step 3: Coupon Code

2. Tap the arrow to apply the discount.

Step 4: Complete Any Necessary Housekeeping Actions

Remove an Item

1. In the **Action** column of the item, choose “Remove.”
2. Tap **Update Items and Quantities** to remove the item from the order.

Remove all Items

1. At the bottom of the Shopping Cart Items section, tap **Clear my shopping cart**.
2. When prompted to confirm, tap **OK**.

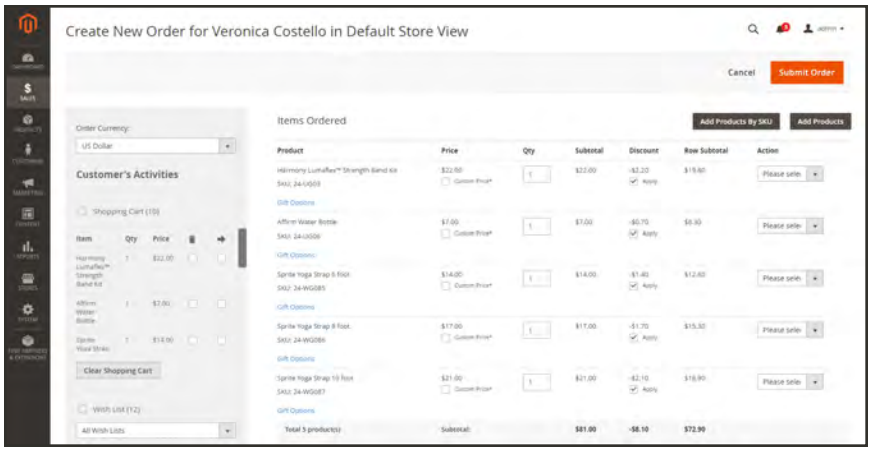
Move an Item to a Specific Wish List

1. In the **Action** column under **Move to Wish List**, choose the name of the specific wish list.
2. Tap **Update Items and Quantities** to move the item to the wish list.

Step 5: Review and Create the Order

1. Review each line item in the **Shopping Cart Items** section, and make any changes necessary.
2. In the upper-right corner, tap **Create Order**.

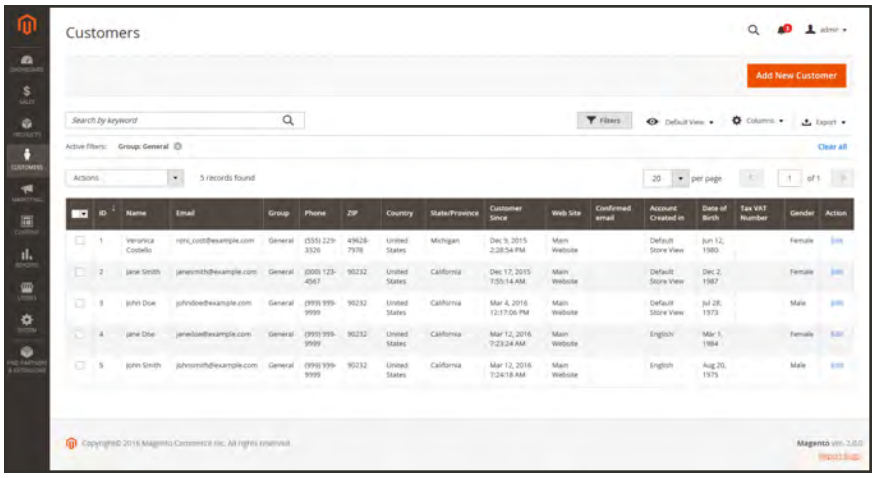
   Follow the standard process to complete and submit the order. To learn more, see: Creating an Order.



Create New Order

Creating a Customer Account

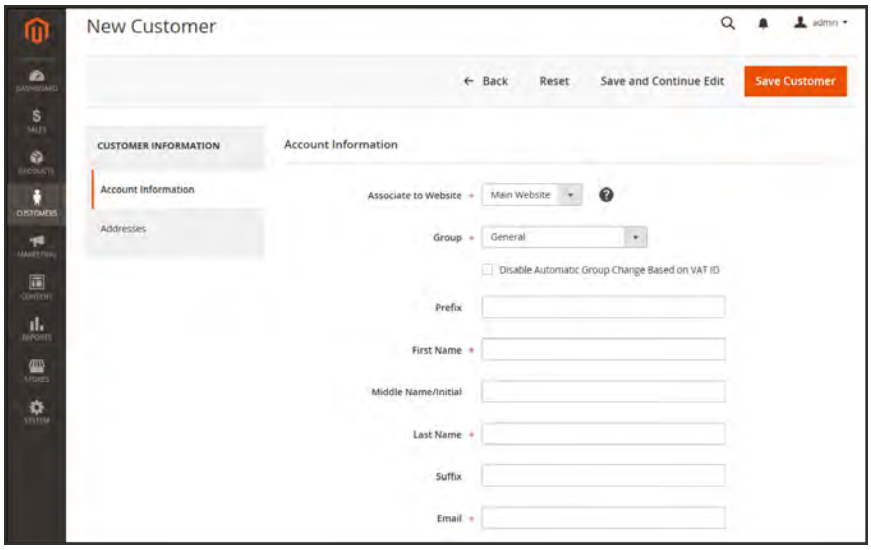
Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which might sometimes be required when customers order by phone.



New Customer Account Information

Step 1: Create a New Customer Account

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Tap **Add New Customer**.
3. In the Account Information section, do the following:



Customer Information

a. To associate the customer with a specific store view, set **Associate to Website** to the view.

b. Assign the customer to a **Customer Group**.

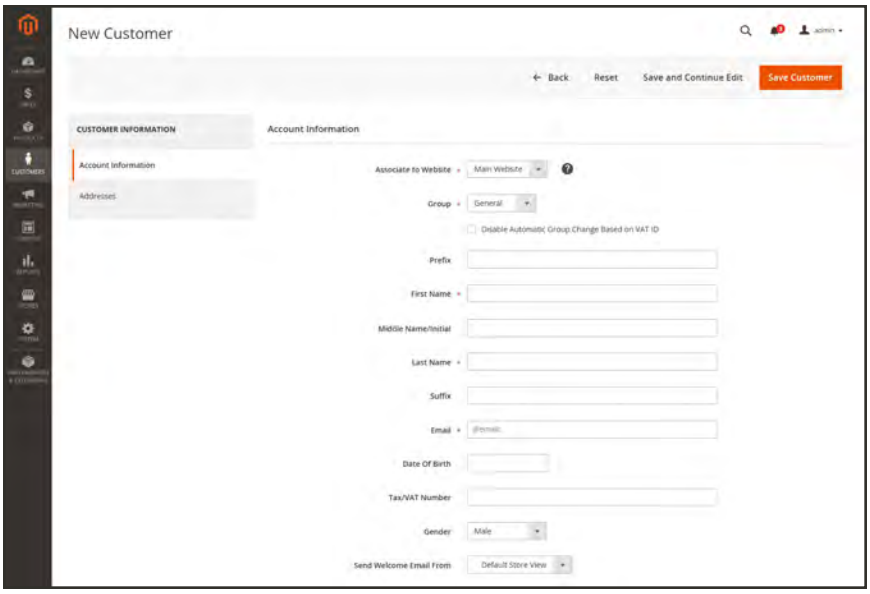
c. If using VAT ID Validation, and want to **Disable Automatic Group Change Based on VAT ID**, mark the checkbox.

4. Complete the following required fields:
   - First Name
   - Last Name
   - Email

5. Complete the optional fields as needed:
   - Prefix
   - Middle Name/Initial
   - Suffix
   - Date Of Birth
   - Tax/VAT Number
   - Gender

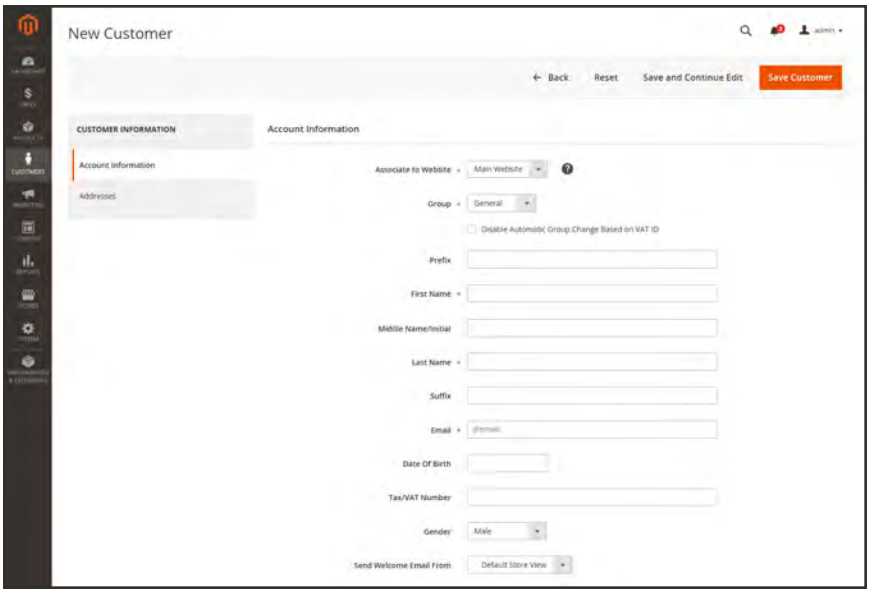
6. Set **Send Welcome Email From** to the customer identity to appear as the sender of the Welcome email.

7. Tap **Save and Continue Edit**.



Customer Information

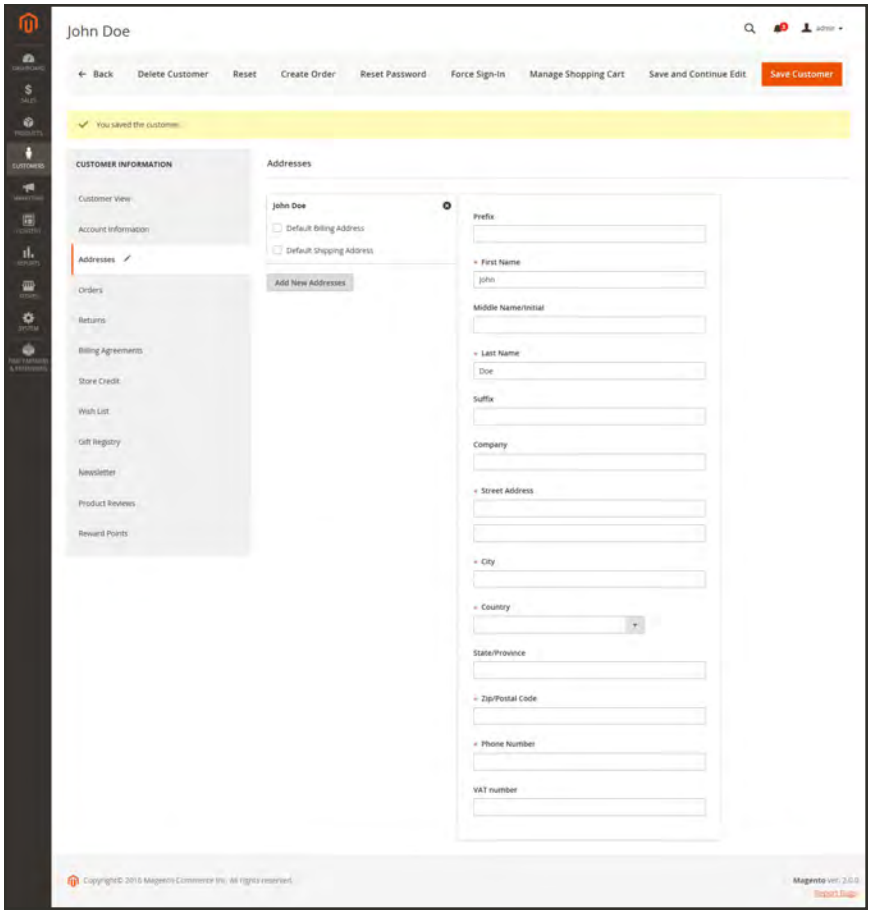
When the customer account is saved, the full set of options appears in the panel on the left and in the menu at the top of the page. The Customer View tab displays a summary of account activity.



Customer Account Saved

Step 2: Complete the Customer Address and Contact Information

1. In the panel on the left, choose **Addresses**.
2. To add a new address, tap **Add New Addresses**. Then, do the following:



Add Address to New Customer Account

d. To determine the type of address, mark one or both of the following checkboxes:

- Default Billing Address
- Default Shipping Address

e. If another person is associated with the address, complete the name information as needed. If the name fields are left blank, the customer name is used for the address.

f. Complete the following address fields as needed:

- Company
- Street Address
- City
- Country
- State/Province
- Zip/Postal Code

g. Complete the following information as needed:

- Phone Number
- Fax
- VAT Number

3. If there is an additional address to associate with the account, tap **Add New Address** and repeat the process.
4. When complete, tap **Save and Continue Edit**.
5. To send the customer a link to reset the password, tap **Reset Password**.
6. When complete, tap **Back** to return to the Customers grid.

Field Descriptions

FIELD	DESCRIPTION
ACCOUNT INFORMATION	
Associate to Website	Identifies the website associated with the customer account.
Group	Identifies the customer group to which the customer belongs. Select the checkbox to disable automatic group change based on VAT.
Prefix	If used, the prefix that is associated with the customers name. For example: Mr, Mrs. or Dr. Depending on the configuration, the input control might be a text field or a drop-down list of options.
First Name	The customer's first name.
Middle Name / Initial	The customer's middle name or middle initial.
Last Name	The customer's last name.
Suffix	If used, the suffix that is associated with the customer's name. For example: Jr.,Sr., or III. Depending on the configuration, the input control might be a text field or a drop-down list of options.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Email	The customer's email address.
Date Of Birth	The customer's date of birth.
Tax / VAT Number	The customer's Tax or Value Added Tax number, if applicable.
Gender	Identifies the customer's gender as Male or Female.
Send Welcome Email From	If you have multiple stores, select the store from which the welcome message will be sent.
ADDRESSES	
New Addressees	Identifies the type of new address. Options: Default Billing Address Default Shipping Address
Add New Addresses	Displays another New Address section to identify the type of the address to be entered.
Company	The company name, if applicable for this address.
Street Address	The street address of the customer. The second line of the street address can be used if needed.
City	The city where the customer resides at this address.
Country	The country where the customer resides at this address.
State/Province	The state or province of the customer at this address.
Zip/Postal Code	The ZIP or postal code of the customer at this address.
Phone Number	The phone number where the customer can be reached at this address.
Fax	The fax number where the customer can be reached at this address.
VAT Number	If applicable, the value added tax number that applies to the customer at this address.

Updating a Customer Account

The panel on the left of the Customer Information page includes information about customer activity, such as when the customer last logged in and out, addresses, order statistics, recent orders, shopping cart contents, product reviews, newsletter subscriptions, and so on. From the customer account, you can do the following:

- Delete Customer
- Reset
- Create Order
- Reset Password
- Force Sign-in

To view customer information:

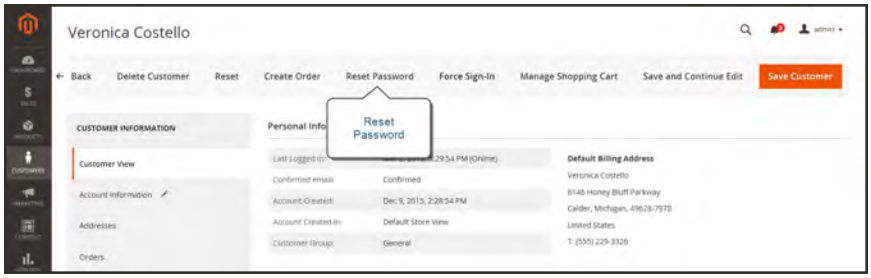
1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the grid, and open the account in edit mode.
3. In the panel on the left, select the type of information you need to edit. Then, make the necessary changes.
4. When complete, tap **Save Customer**.

Unlocking Customer Accounts

Customers sometimes need help accessing their accounts. If for some reason they can't reset their password, you can reset it for them from the Admin. Very rarely it might become necessary to forcibly sign in to a customer account. During the process, the customer tokens are revoked, and new ones created. Then, a link is sent to the customer to reset the password.

To reset a customer password:

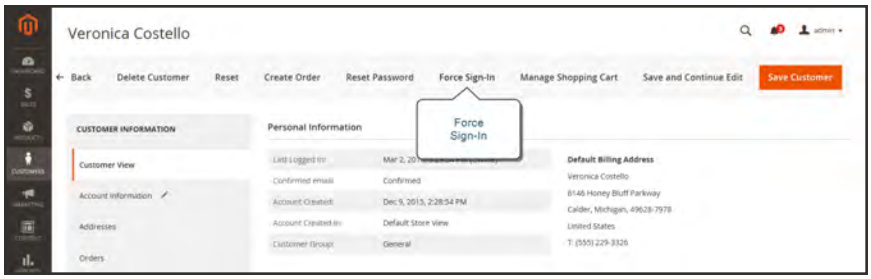
1. On the Admin sidebar, tap **Customers**. Then choose **All Customers**.
2. Find the customer in the grid, and click **Edit**.
3. At the top of the page, choose **Reset Password**.



Reset Password

To force a customer-sign-in:

1. On the Admin sidebar, tap **Customers**. Then choose **All Customers**.
2. Find the customer in the grid, and click **Edit**.
3. At the top of the page, choose **Force Sign-In**.



Force Sign-In

4. When prompted to confirm, tap **OK** to remove the tokens associated with the account.

Creating an Order

For registered customers and guests 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. You can add products from the catalog, order by SKU, or transfer items directly to the order from recent customer activities,

Process Overview:

Step 1: Initiate the Order

Step 2: Add Products to the Order

Step 3: Complete Any Additional Options

Step 4: Housekeeping Actions

Step 5: Complete the Payment and Shipping Information

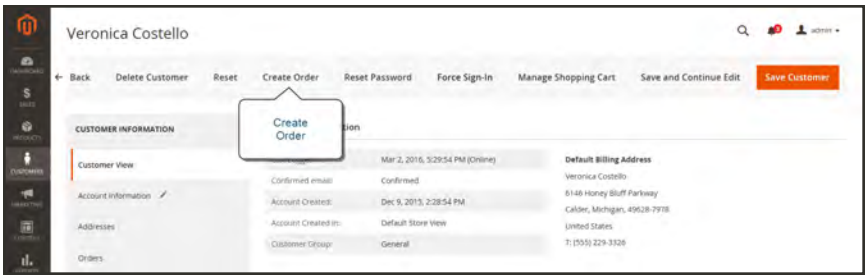
Step 6: Review and Submit the Order

Step 1: Initiate the Order

1. Use one of the following methods to initiate the order:

Method 1: Create New Order from Customer Account

1. On the Admin sidebar, tap **Customers.** Then, choose **All Customers**.
2. Find the customer in the grid, and click **Edit**.
3. At the top of the page, tap **Create Order**.



Create Order

Method 2: Create New Order from Orders Grid

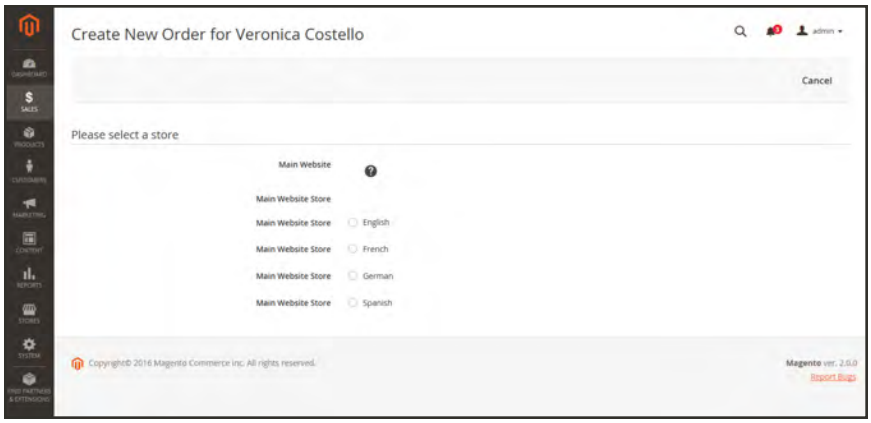
1. On the Admin sidebar, tap **Sales**. Then, choose **Orders**.
2. Tap **Create New Order**.

Create New Order

3. Do one of the following:
   - Find the registered customer in the list, and open the record in edit mode.
   - To create a customer account for a guest, tap **Create New Customer**.
4. Complete the information in the following sections:
   - Account Information
   - Address Information

If you need help, see: Creating a Customer Account.

2. If there are multiple stores, choose the store view that is associated with the order.



Step 2: Add Products to the Order

Method 1: Add Products from Catalog

1. Tap **Add Products**.
2. If necessary, tap **Reset Filter** to list all products in the catalog. Then, do the following:
   a. Use the filter controls as needed to find the products to be added.
   b. Tap **Search**.
3. Mark the checkbox of each product to be added to the cart.
4. Enter the **Qty** of each to be purchased.

Method 2: Add Products by SKU

1. Tap **Add Products by SKU**.

Add to Order by SKU

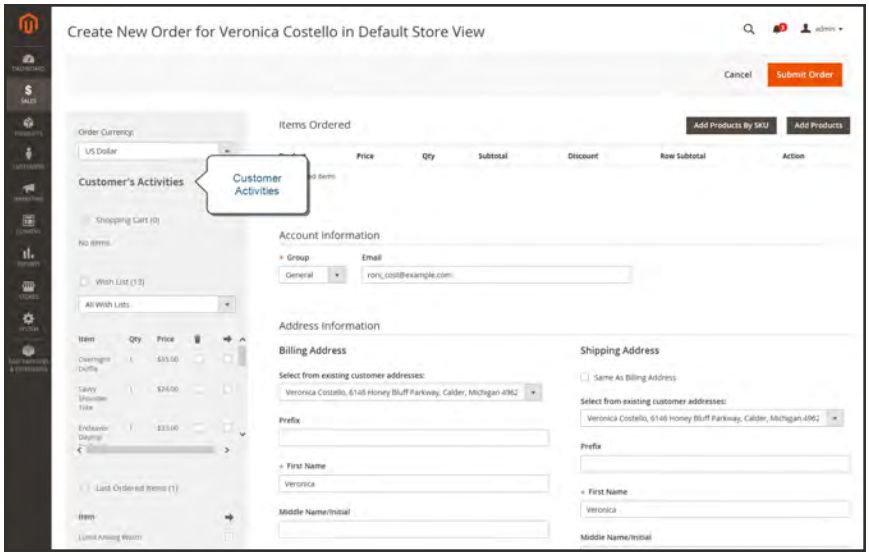
2. To enter individual SKUs, do the following:
   a. Enter the **SKU number** to be added to the order. Then, enter the **Qty**.
   b. Tap **Add another**, and repeat as needed.
3. To import a list of SKUs, do the following:
   a. Prepare a CSV file that includes columns for SKU and Qty.
   b. Tap **Choose File**, and select the file to upload.
4. When complete, tap **Add to Order**.

Method 3: Add Products from Current Activities

The panel on the left lists recent customer activities. You can scroll down to view the complete order detail, which includes the following section:

- Items Ordered
- Account Information
- Address Information

- Payment & Shipping Information
- Gift Options
- Order Total



New Order Detail

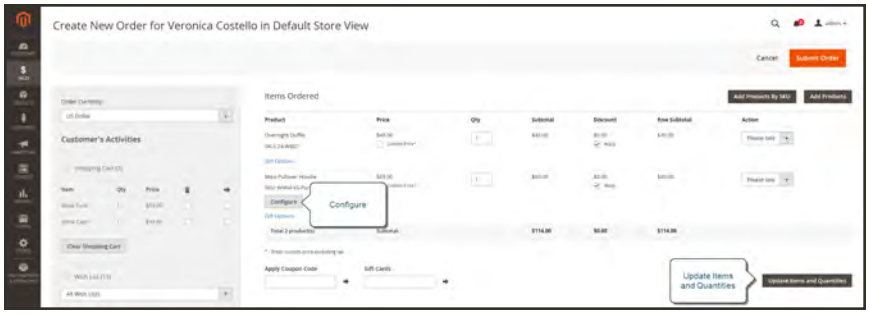
1. Mark the **Add to Order** checkbox under the arrow ➔ for each product to be added.
2. Scroll down to the bottom of the panel and tap **Update Changes**.
3. The items appear in the Items Ordered section at the top of the page.

Step 3: Complete Any Additional Options

Complete as many of the following additional options as needed for the order.

Configure Product Options

1. For any product with multiple options, tap **Configure**. Then, do the following:



Items Ordered

a. Choose each product option.

b. Update the **Quantity** as needed.

c. Tap **OK**.

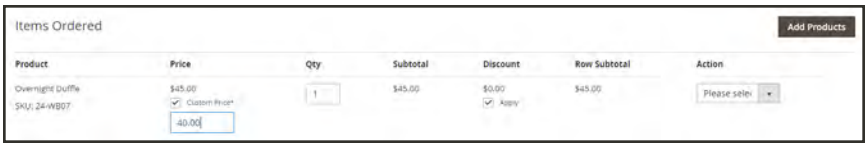
Choose the Product Options

2. When you return to the order form, tap **Update Items and Quantities** to apply the changes to the product listing in the Items Ordered section.

Enter a Custom Price

1. To override the price of an item, mark the **Custom Price** checkbox. Then, enter the new price in the box below, without tax.

2. Tap **Update Items and Quantities** to update the order.



Custom Price

Apply a Coupon Code

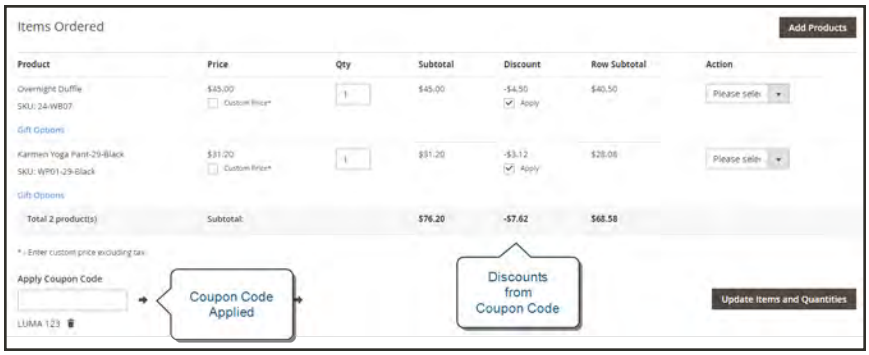
If the customer has a coupon, the store administrator can enter the coupon code for the customer. In this example, the store has a coupon code that can be used at the discretion of the store administrator to apply a 10% discount to the order. The applied discount appears in the Discount column.

1. Enter the coupon code in the **Apply Coupon Code** field. Then, tap the arrow ➡.

   The discount is applied to items according to the conditions of the cart price rule.

2. To revoke the discount from any item, clear the **Apply** checkbox in the Discount column.

3. Tap **Update Items and Quantities** to apply the coupon code the order.

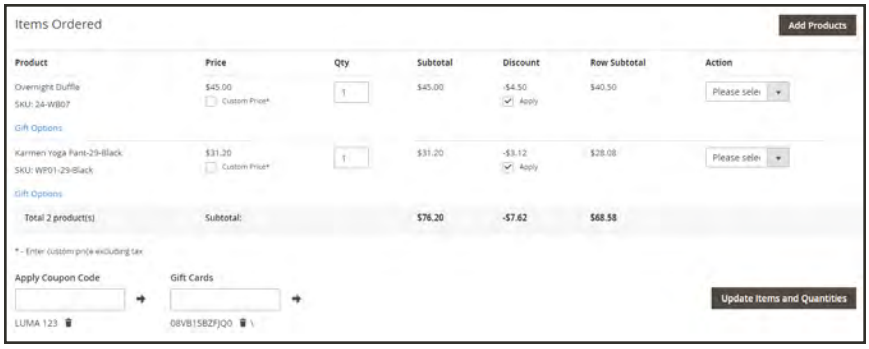


Apply Coupon Code

Apply Gift Card(s)

1. Enter the gift card code in the **Gift Cards** field. Then, tap the arrow ➔.
2. If the customer has multiple gift cards, repeat this step for each. Each gift card that is applied to the order appears below.

   The total amount applied from the gift card (s) appears in the Order Totals section.



Apply Gift Card Code

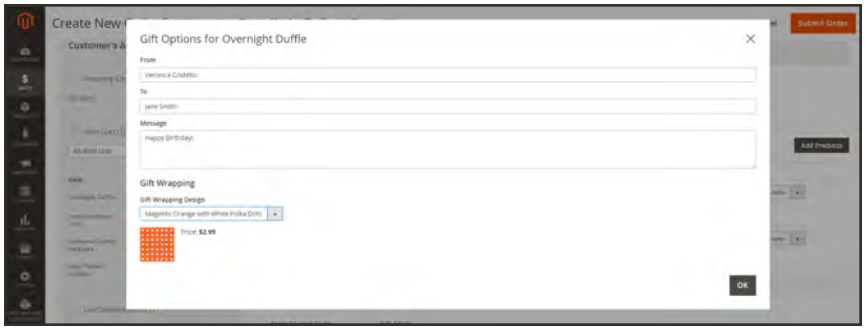
Add Gift Options

The selection of available options is determined by the Gift Options and Gift Wrap configuration.

Method 1: Apply Gift Options to an Item

1. In the Items Ordered section under the Product SKU, click the **Gift Options** link.
2. Enter the name of the recpient in the **To** field, and a **Message** if applicable.
3. To gift wrap the item, set **Gift Wrapping Design** to your preference.
4. Tap **OK**.

The Order Totals section is updated with the Gift Options applied to the item.

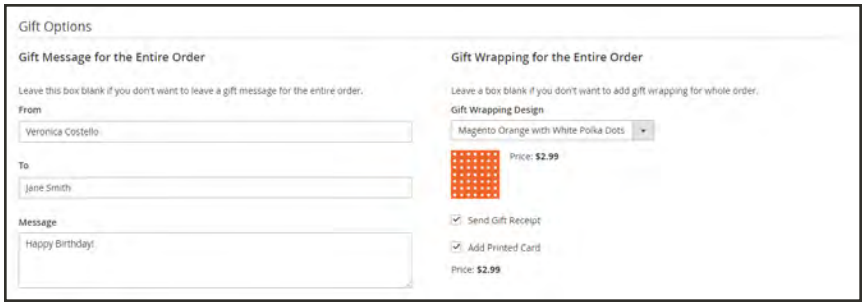


Add Gift Options to an Item

Method 2: Apply Gift Options to the Entire Order

1. Scroll down to the **Gift Options** section of the order.
2. Enter the name of the recpient in the **To** field, and a **Message** if applicable.
3. To gift wrap the item, set **Gift Wrapping Design** to your preference.
4. Mark the **Gift Receipt** checkbox to include a printed receipt without prices that the recipient can use to exchange the item.
5. Mark the **Add Printed Card** checkbox if applicable.

   The Order Totals section is updated with the Gift Options applied to the order.



Gift Options

Step 4: Housekeeping Actions

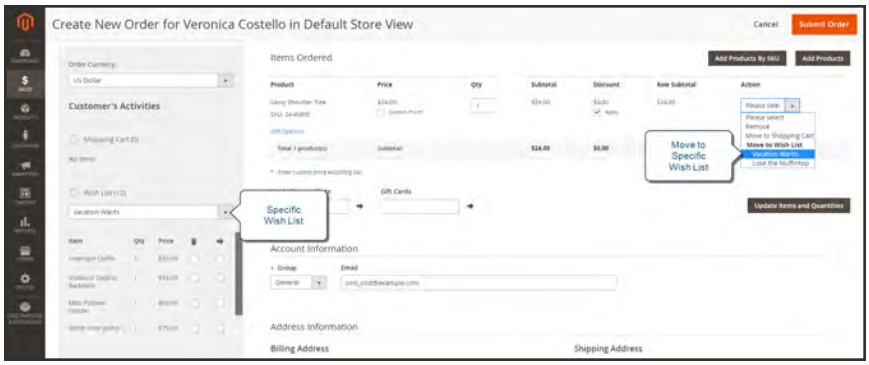
Remove an Item

1. In the **Action** column of the item, choose "Remove."
2. Tap **Update Items and Quantities** to remove the item from the order.

Move an Item to the Cart

1. In the **Action** column of the item, choose "Move to Shopping Cart."
2. Tap **Update Items and Quantities** to move the item to the customer's shopping cart.

   The item appears in the Shopping Cart section of Customer Activities.



Move to Wish List

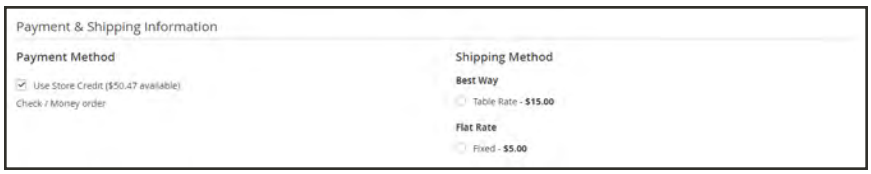
Move an Item to a Specific Wish List

1. In the **Action** column under **Move to Wish List**, choose the name of the specific wish list.
2. Tap **Update Items and Quantities** to move the item to the wish list.

   The item appears in the Customer Activities panel under Wish Lists.

Step 5: Complete Payment & Shipping Information

1. Choose the **Payment Method** to be applied to the order.
2. If applicable, mark the **Use Store Credit** checkbox.
3. Under **Shipping Method**, click **Get shipping methods and rates**. Then, choose the shipping method that you want to use for the order.



Shipping Methods

Step 6: Review and Submit the Order

1. In the **Order Total** section, do the following:
   a. Under **Order History**, enter any **Order Comments** related to the order.
   b. To make the comment visible to the customer, mark the **Append to Order** checkbox.
   c. To send a confirmation of the order to the customer, mark the **Email Order Confirmation** checkbox.
2. Review the order to make sure that everything is complete. Then, tap **Submit Order.**
3. When complete, tap **Submit Order**.

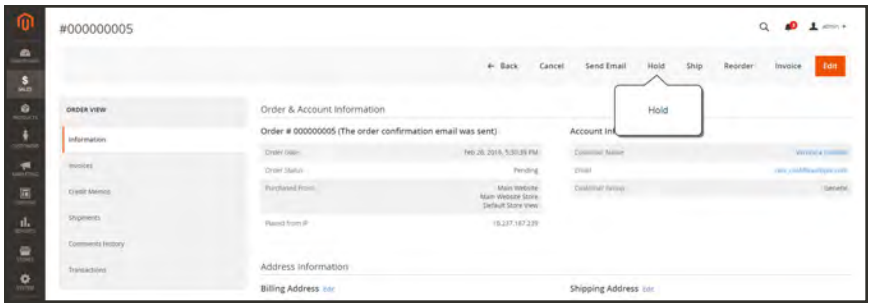
Order Totals

Updating an Order

After a customer places an order, it is sometimes necessary to edit the order, place it on hold, or cancel it entirely. When you change an order, the original order is canceled and a new order is generated. You can, however, change the billing or shipping address without generating a new order.

To edit an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order to be edited. Then in the **Action** column, click the **View** link.
3. In the upper-right corner, tap **Edit**. When prompted to confirm, tap **OK** to continue.



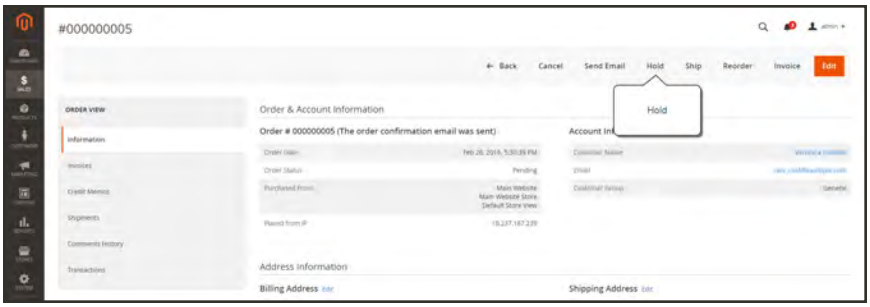
Edit Order

4. Make the necessary changes to the order.
5. When complete, do one of the following:
   - To save changes made to the billing or shipping address, tap **Save**.
   - To save changes made to line items, and reprocess the order, tap **Submit Order**.

To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

1. In the Orders grid, find the pending order that you want to place on hold.
2. In the **Action** column, click the **View** link.
3. Tap **Hold** to place the order on hold.



Hold Order

4. When you are ready to return the order to an active state, repeat the process and tap **Unhold**.

To cancel an order:

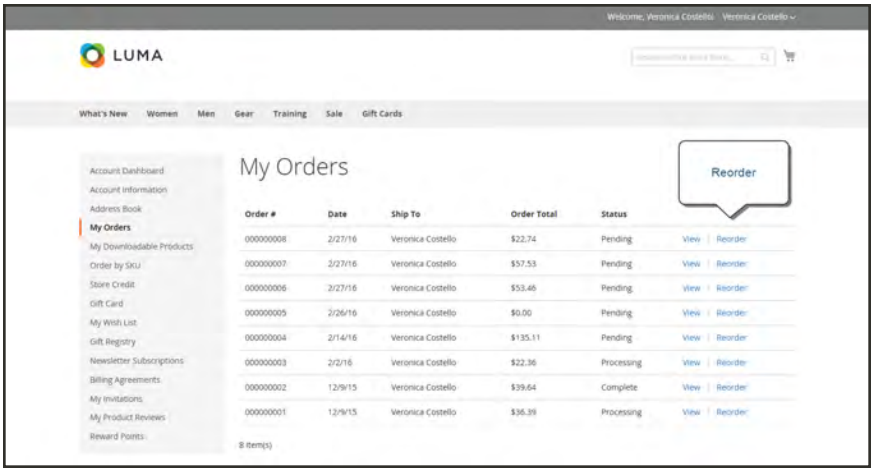
Canceling an order removes it from the list of pending orders.

1. In the Orders grid, find the pending order to be canceled.
2. In the **Action** column, click the **View** link.
3. In the upper-right corner, tap **Cancel**. When prompted to confirm, tap **OK**.

Cancel Order

Allow Reorders

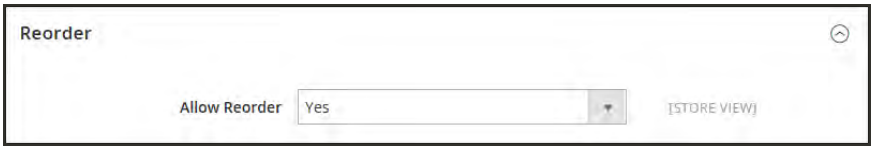
When enabled, reorders can be made from the customer account. Reorders are enabled by default.



Reorder from Customer Account

To configure customer reorders:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand the **Reorder** section.

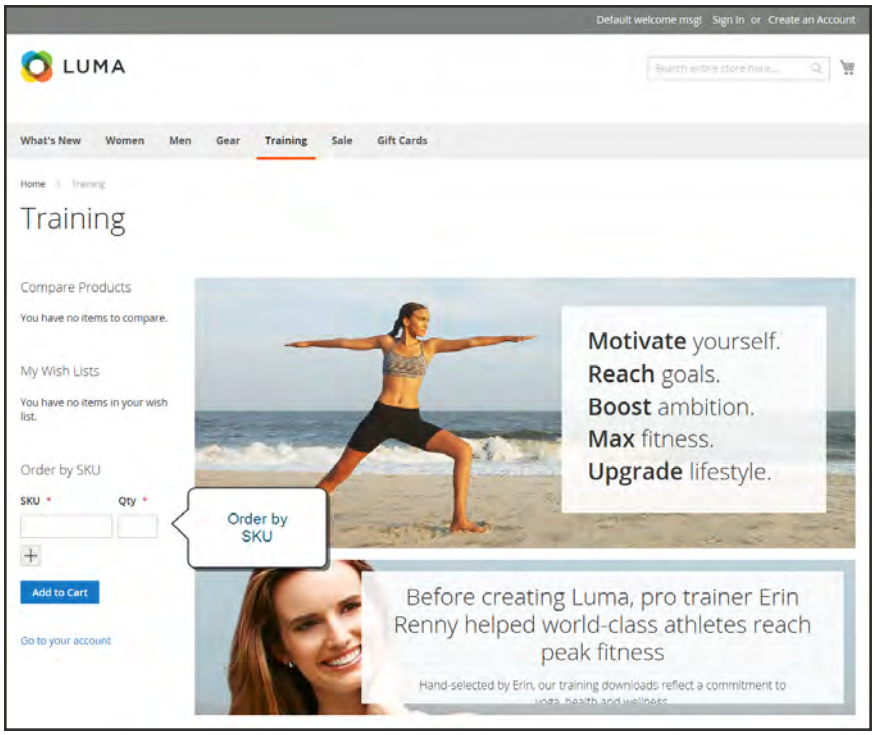


Reorder

4. Set **Allow Reorder** to your preference.
5. 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.

Order by SKU Settings

When complete, tap **Save Config**.

CHAPTER 56:

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 steps appear at the top of the page to lead the customer through the process. Customers who are logged into their accounts can complete checkout quickly, because much of the information is already in their accounts.

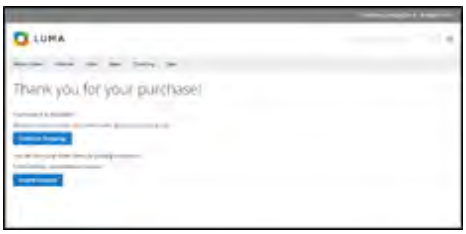
Checkout Steps

Step 1: Shipping

During the first step of the checkout process, the customer completes the shipping address information, and to chooses the shipping method.

Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and reviews the order totals.

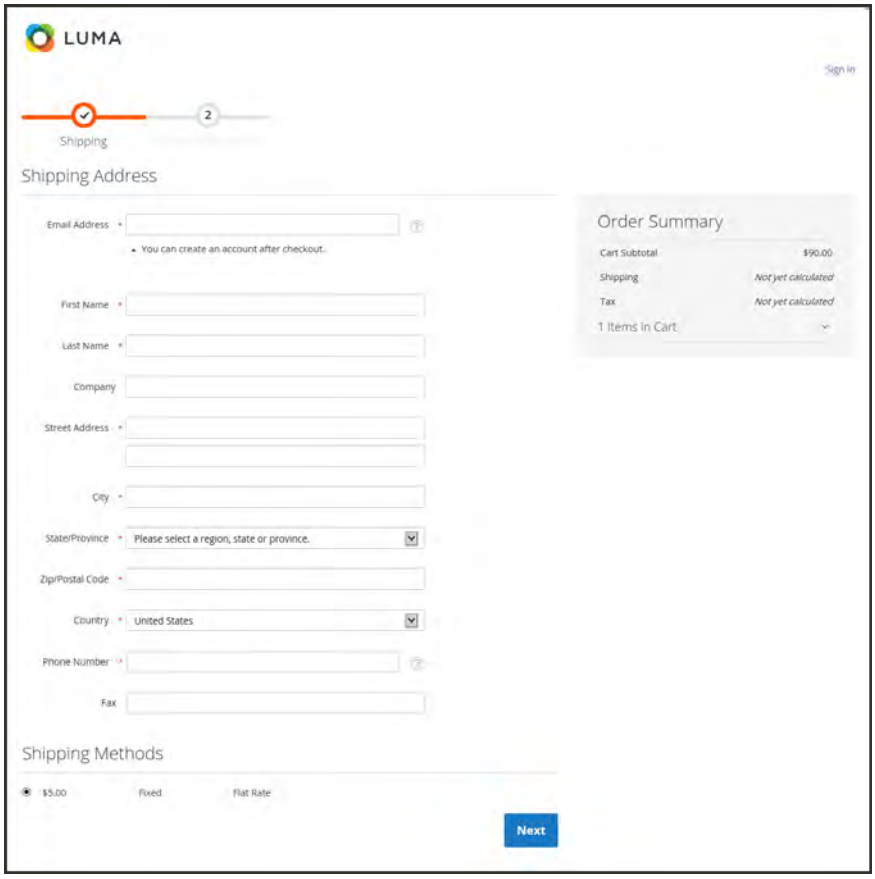


Step 3: Order Confirmation

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.

Step 1: Shipping

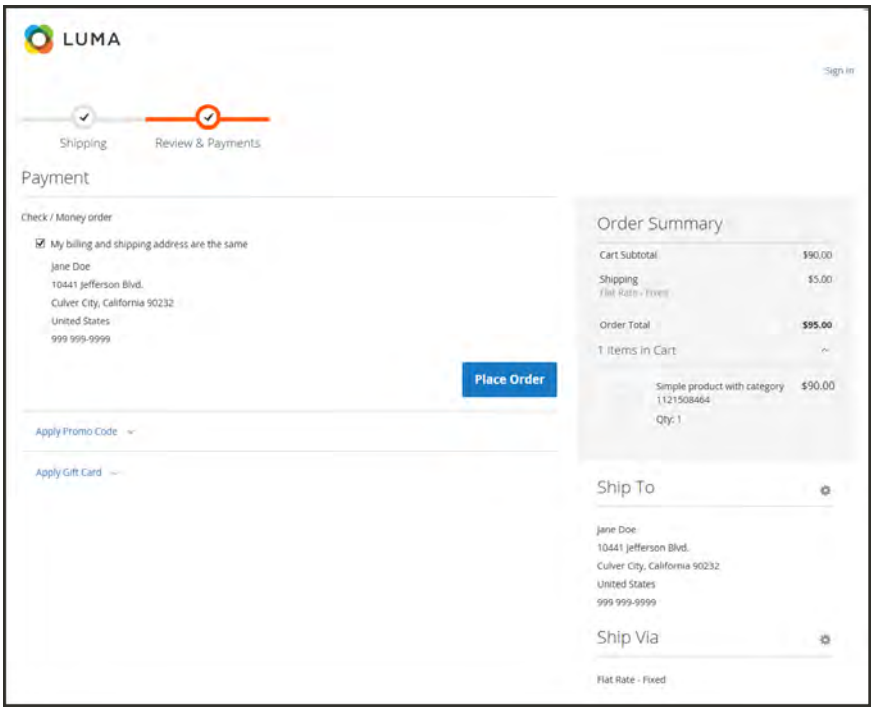
The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method. If the customer has an account, the shipping address is entered automatically, but can be changed if needed. The progress bar at the top of the page follows each step of the checkout process, and the Order Summary shows the information entered so far.



Checkout Step 1: Shipping

Step 2: Review & Payments

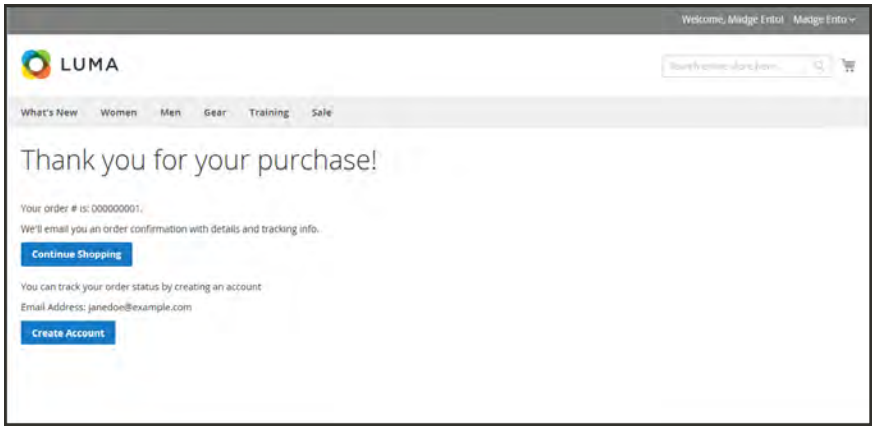
During the second step of the checkout process, the customer chooses the payment method, and applies any promotional codes or gift cards to the purchase. All information can be reviewed, and edited if needed. If enabled, the customer must to agree to the terms and conditions of the sale before placing the order.



Review & Payments

Step 3: 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 can be used to track conversions.



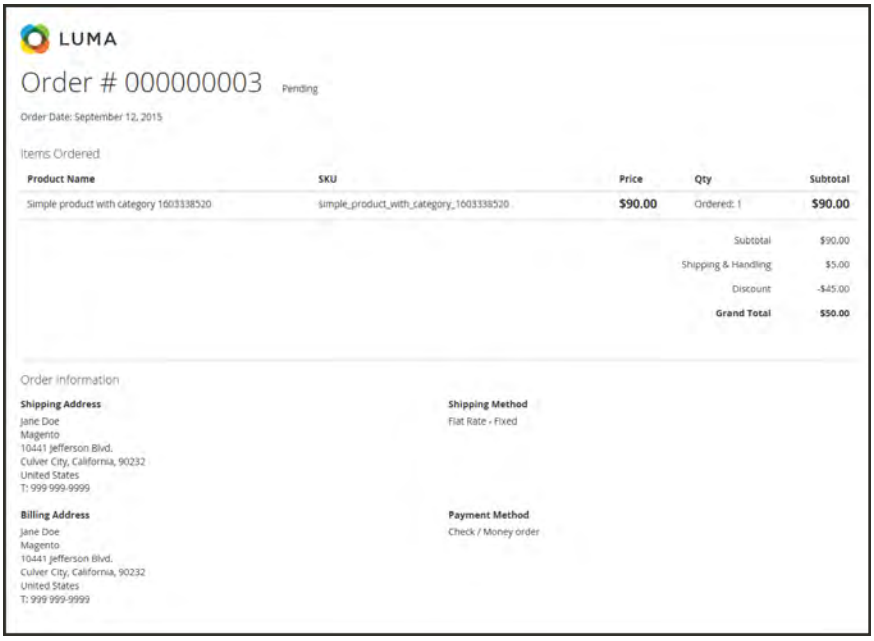
Order Confirmation

Order Receipt

Customers can generate a receipt for the order by clicking a link on the confirmation page. The receipt can be sent to a printer or saved as a PDF

To generate a receipt:

1. From the confirmation page, tap the **Order Receipt** link.
2. Right-click anywhere on the receipt page, and choose **Print**.



Order Receipt

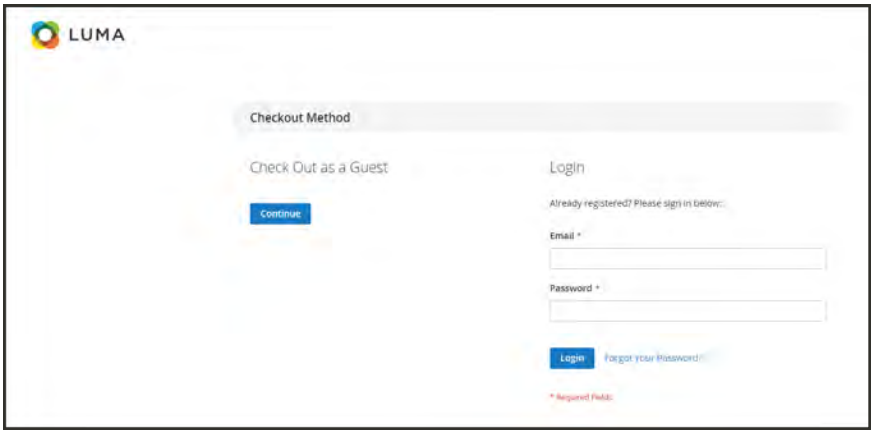
Checkout Configuration

The checkout configuration determines the format of the page, the requirements to make a purchase, and the options that are available during the checkout process. Topics include:

- Guest Checkout
- Terms and Conditions
- Checkout Totals Sort Order
- One Page Checkout

Guest Checkout

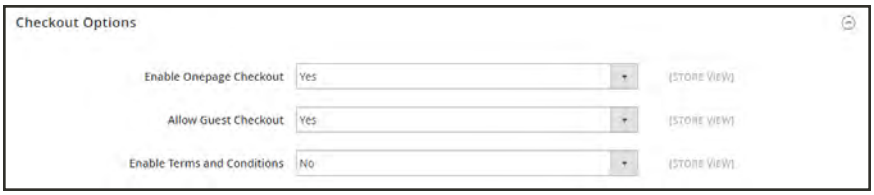
Your store can be configured to require that shoppers open an account before making a purchase, or configured to allow unregistered guests to go through the checkout process. Guests can register for an account after they complete the checkout process.



Checkout as Guest

To allow guest 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. Set **Allow Guest Checkout** to "Yes."

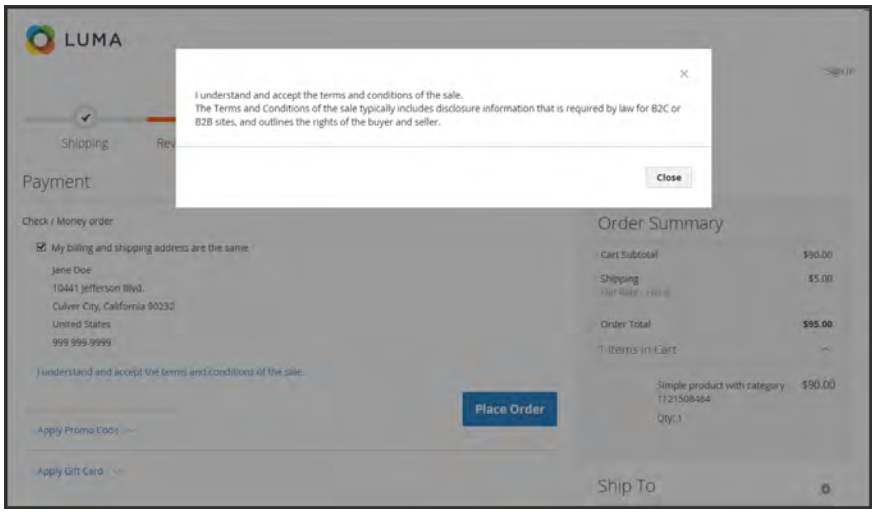


Checkout Options

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

Terms and Conditions

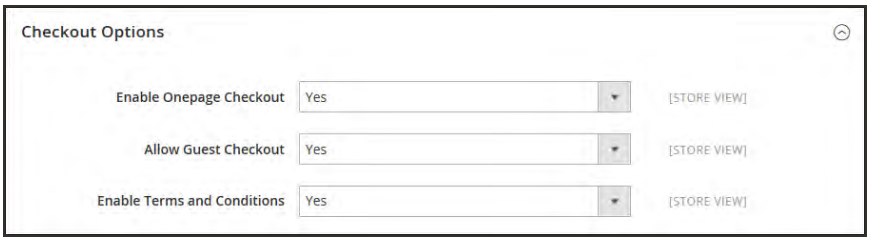
When Terms and Conditions is enabled, customers are required to agree to the terms and conditions of the sale before the purchase is finalized. The Terms and Conditions of the sale typically includes disclosure information that might be required by law for B2C or B2B sites, and outlines the rights of the buyer and seller. The Terms and Conditions message appears after the payment information, just before the Place Order button.



Terms and Conditions at Checkout

Step 1: Enable Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Checkout Options** section. Then, do the following:
   a. Verify that **Enable Onepage Checkout** is set to "Yes."
   b. Set **Enable Terms and Conditions** to "Yes."

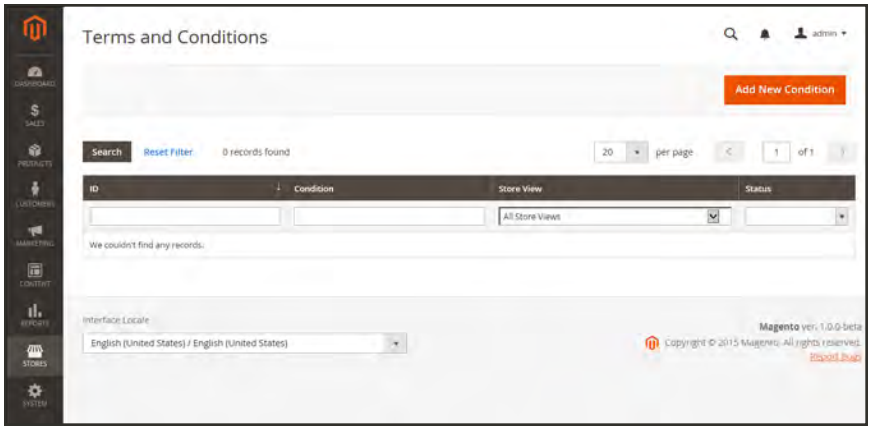


Checkout Options

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

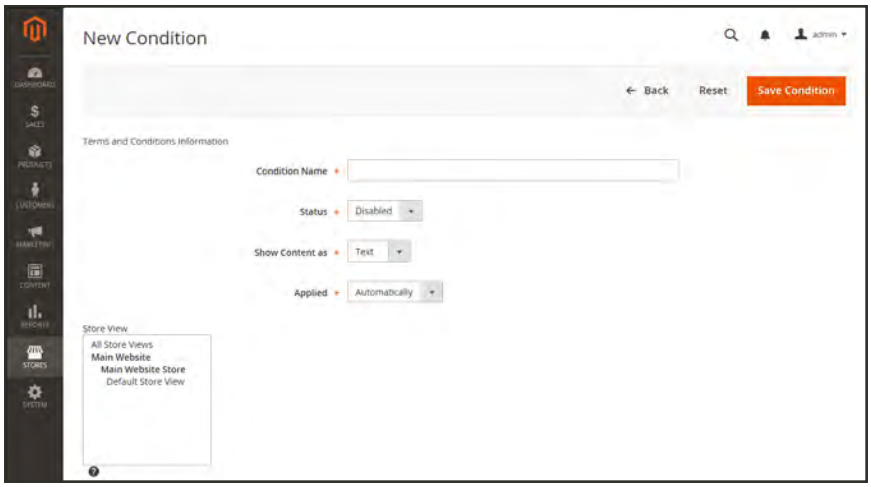
Step 2: Add Your Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Terms and Conditions**.
2. In the upper-right corner, tap **Add New Condition**.



Terms and Conditions Information

3. In the Terms and Conditions Information section, complete the following:



New Condition

a. Enter the **Condition Name** for internal reference.

b. Set **Status** to "Enabled."

c. Set **Show Content as** to one of the following:

Text	Displays the terms and conditions content as unformatted text.
HTML	Displays the content as HTML which can be formatted..

4. Select each **Store View** where the Terms and Conditions is to be used.

5. Enter the **Checkbox Text** to be used as the text for the Terms and Conditions link. For example, "I understand and accept the terms and conditions of the sale.

6. In the **Content** box, enter the full text of the terms and conditions of the sale.

7. (Optional) Enter the **Content Height (css)** in pixels, to determine the height of the text box where the terms and conditions statement appears during checkout. For example, to make the text box one inch high on a 96 dpi display, enter 96. A scroll bar appears if the content extends beyond the height of the box.

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

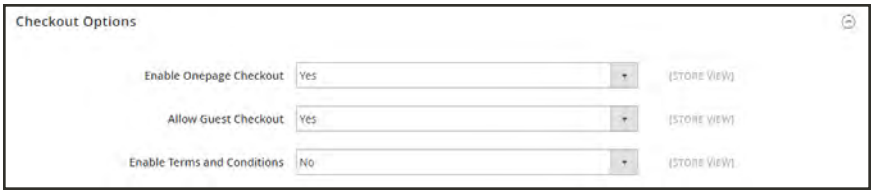
One Page Checkout

The purpose of OnePage Checkout is to gather the information that is needed, and complete the sale as quickly as possible. When Onepage Checkout is enabled, the entire checkout process takes place on a single page. Each section of the checkout information is expanded as needed.

Magento's Onepage Checkout is enabled by default. If you are implementing a custom integration or checkout extension, it might be necessary to disable Onepage Checkout.

To disable Onepage Checkout:

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

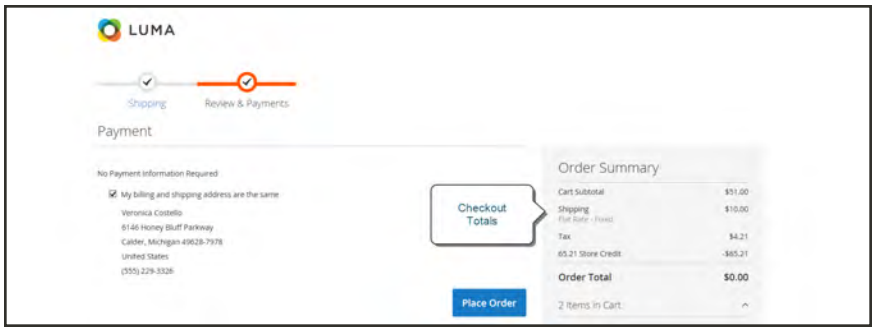


Checkout Options

3. Expand the **Checkout Options** section.
4. Set **Enable Onepage Checkout** to "No."
5. When complete, tap **Save Config**.

Checkout Totals Sort Order

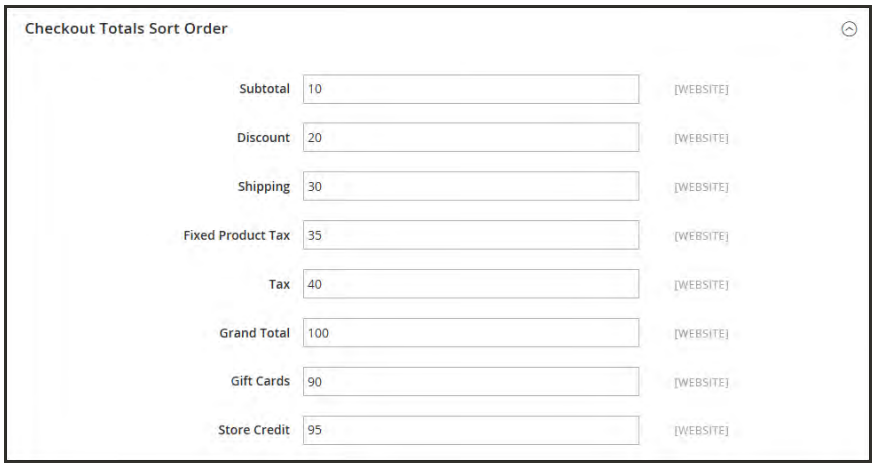
During Order Review, the total appears at the bottom of the order, with any adjustments for discounts, gift cards, shipping charges, store credit, and tax. The order of each item determines the sequence of the calculations, and is set by a number that is assigned to each item. for example, the Subtotal 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 the first and the last.



Checkout Totals with Store Credit Applied

To configure the checkout totals:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand the **Checkout Totals Sort Order** section.



Checkout Totals Sort Order

4. Change the number assigned to each item to determine its order in the Totals section..
5. When complete, tap **Save Config**.

Notes

Order Management

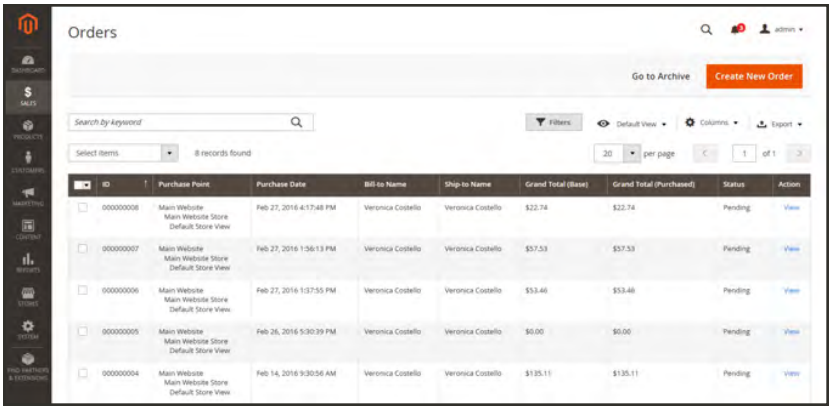
In this section of the guide, you will learn about each stage of the order workflow, and how to process orders, create invoices, and shipments. You will also learn how to issue credit memos and store credit, and RMAs for returned merchandise.

Contents

CHAPTER 57:

Orders

In this section of the guide, you will learn how to fulfill orders, print invoices, collect payment, process credit memos, manage returns, and more.



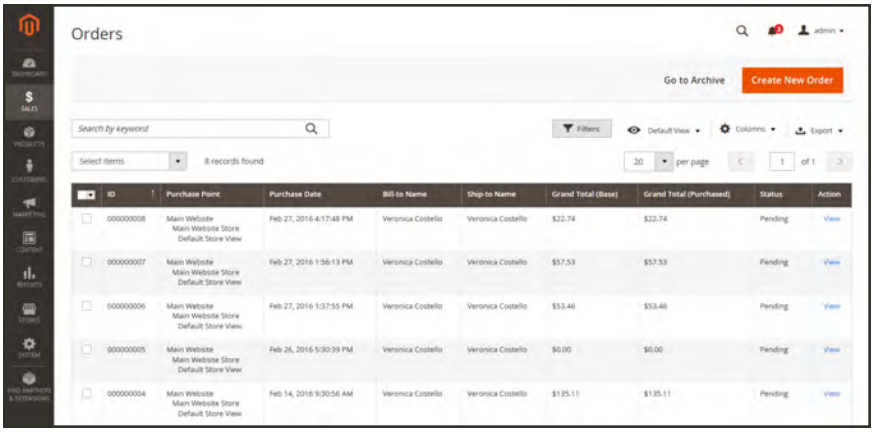
Orders

Orders Workspace

The Orders workspace lists all orders that are not yet archived. From the Orders grid, you can view and edit existing orders, invoice and ship orders, and create new orders. The Purchase Point column identifies the location in your store hierarchy where the purchase originated.

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. The commands above the pagination controls can be used to filter the list, change the default view, change and rearrange columns, and export data.

To improve performance, updates to the Orders grid can be scheduled to take place at regular intervals as a cron job.



Orders

Workspace Controls

CONTROL	DESCRIPTION
Search	Initiates a search for orders based on keywords entered in the search box, and current filters.
Create New Order	Creates a new order.
Go to Archive	Displays the list of archived orders.
Search	Initiates a search for orders based on the current filters.
Reset Filter	Restores all filters to a blank state.

Workspace Controls (cont.)

CONTROL	DESCRIPTION
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 Move to Archive
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.

Default Columns

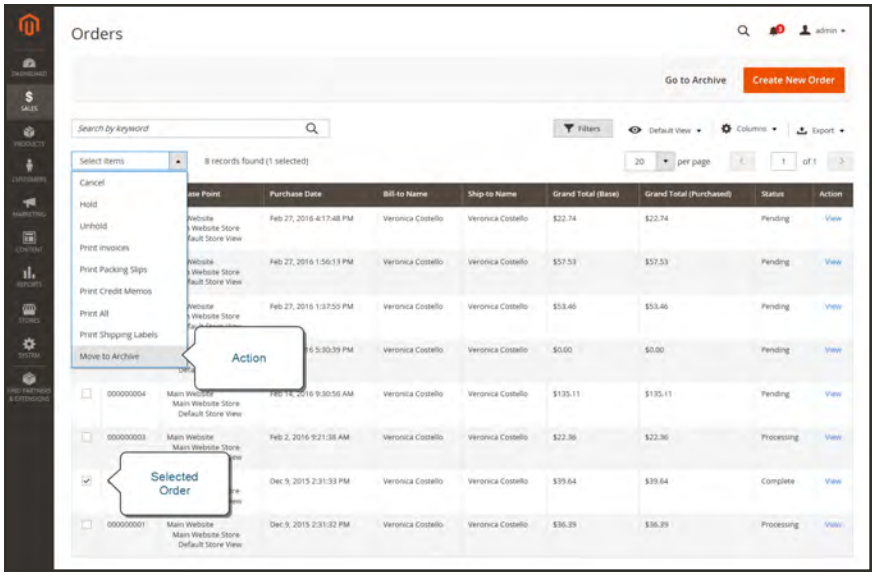
COLUMN	DESCRIPTION
Selection State	Filters the list of orders based on checkbox status. Options: Any — Lists all records, regardless of checkbox status. Yes — Lists only records with the checkbox marked. No — Lists only records without the checkbox marked.
ID	A unique, sequential number that is assigned when a new order is saved for the first time.
Purchase Point	Identifies the store view where the order was placed.

Default Columns (cont.)

COLUMN	DESCRIPTION
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status.
Action	The View link opens the order.

Order Actions

The Actions control gives you the ability to apply specific operations to either individual or multiple orders. You can change the order status, move orders to the next stage in the workflow, and print invoices, packing slips, shipping labels, and credit memos. .



Order Actions

To apply an action:

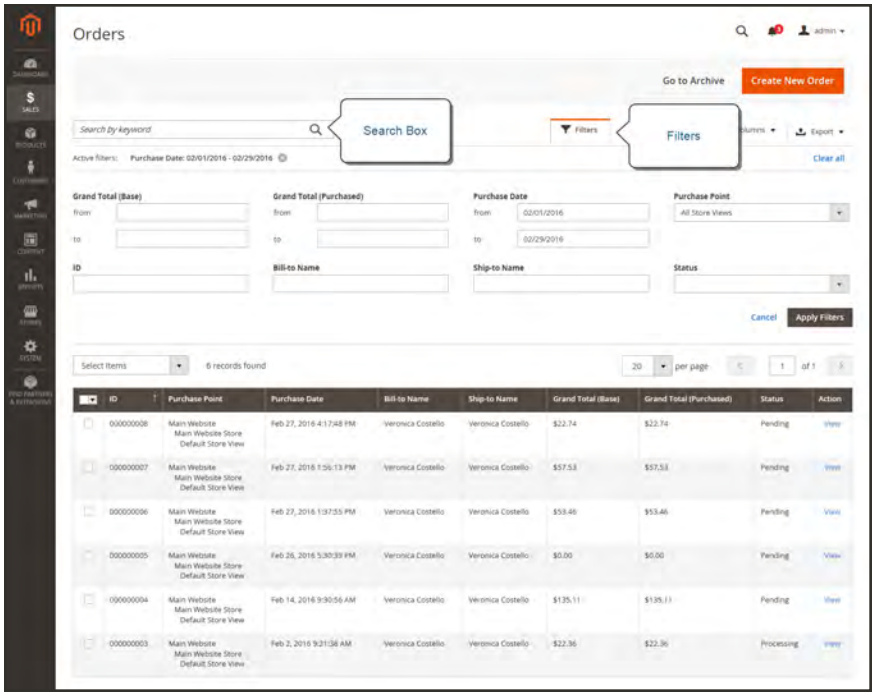
1. Use one of the following methods to select each order that is to be subject to the action.
   - Mark the checkbox in the first column.
   - Use the **Mass Actions** control to select multiple orders.
2. Set the **Actions** control to the operation to be applied to the selected orders.
3. Tap **Submit**.

Order Actions

ACTION	DESCRIPTION
Cancel	Changes the status of the selected “Pending” order(s) to “Canceled.”
Hold	Changes the status of the selected “Pending “ or “Processing” order (s) to “On Hold.”
Unhold	Removes the Hold on the selected order(s), and restores their previous status.
Print Invoices	Prints invoices for selected order(s) that have already been invoiced..
Print Packing Slips	Prints packing slips for the selected order(s) .
Print Credit Memos	Prints credit memos for the selected order(s).
Print All	Prints both an invoice and packing slip for the selected order(s).
Print Shipping Labels	Prints shipping labels for the selected order(s).
Move to Archive	Archives the selected order(s), so they no longer appear in the Orders grid.

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 that appear in the grid.



Filtered Search for Month of February

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:

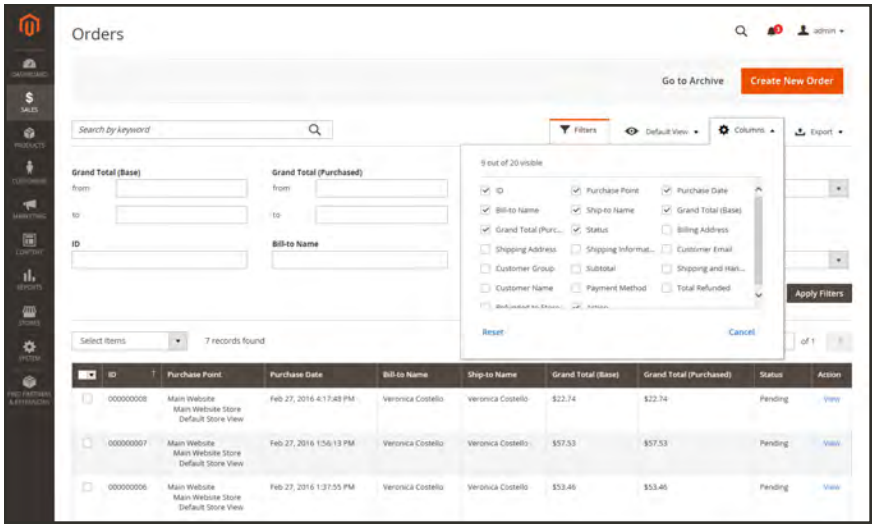
1. Tap the **Filters** tab to display the selection of search filters.
2. Complete as many of the filters as needed to describe the order(s) that you want to find.
3. Tap **Apply Filters** to display the results.

Search Filters

FILTER	DESCRIPTION
ID	Filters the search based on order ID.
Bill-to Name	Filters the search by the name of the person who is responsible to pay for the order.
Ship-to Name	Filters the search by the name of the person to whom each order is shipped .
Purchase Point	Filters the search by website, store, or store view where the order was placed.
Status	Filters the search based on order status. Options: Canceled Closed Complete Suspected Fraud On Hold Payment Review PayPal Canceled Reversal Pending Pending Payment Processing
Purchase Date	Filters the search based on the date purchased. To find orders within a range of dates, enter both the From and To dates.
Grand Total (Base)	Filters the search based on the Grand Total of each order.
Grand Total (Purchased)	Filters the search based on Grand Total of items purchased in each order.
Apply Filters	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

Order Grid Layout

The selection of columns and their position in the grid can be changed, and saved as a grid "view." By default, only nine of the twenty available columns are included in the grid.



Order Grid Columns

To change the selection of columns:

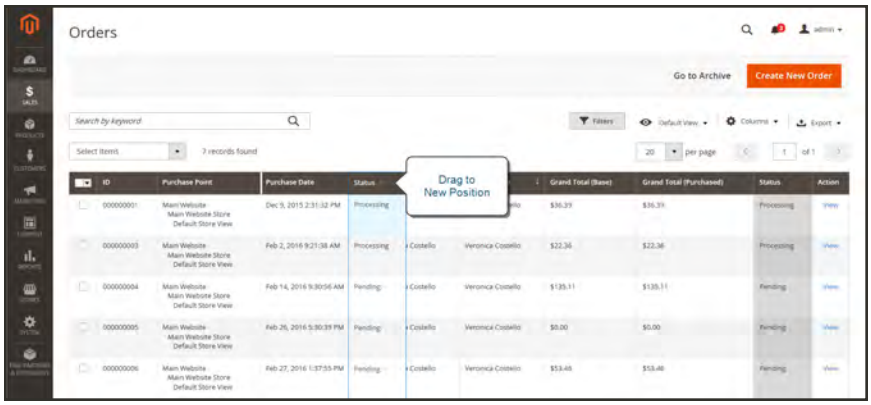
In the upper-right corner, tap the **Columns** ⚙ control. Then, do the following:

- 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.

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.



Moving a Column

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.

Save Current View

To change the view name:

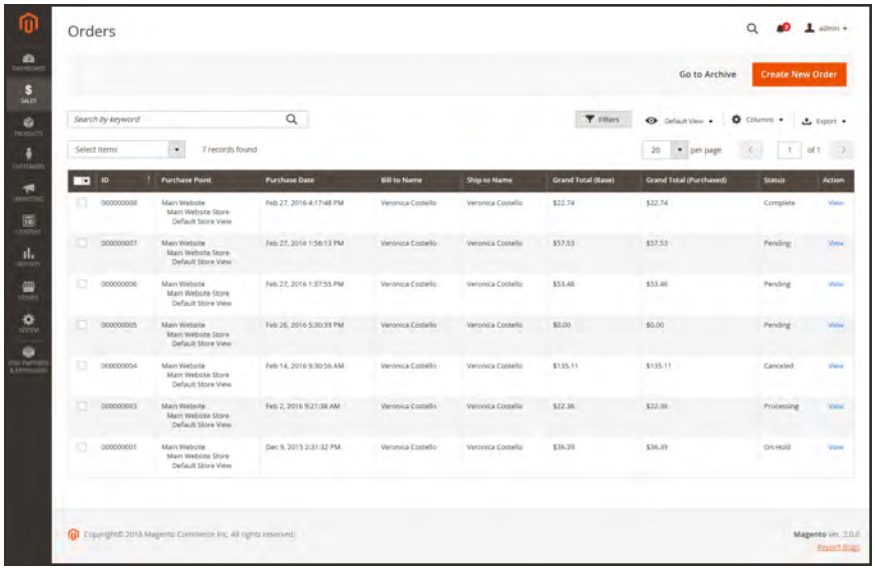
Tap the **View** 👁 control. Then, do one of the following:

- 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.

Edit View Name

Processing Orders

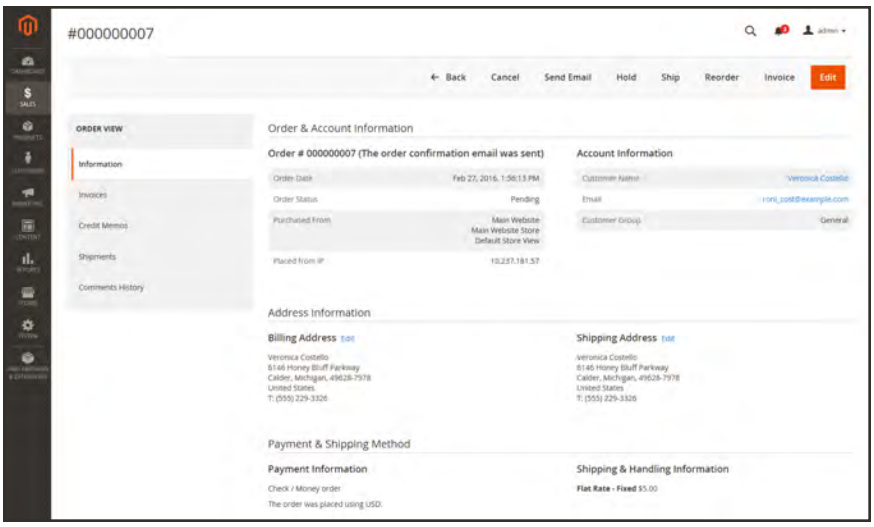
When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of “Pending” until payment is received. Sales orders can be canceled until an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices become shipments. The Orders grid lists all orders, regardless of where they are in the workflow.



Orders

To view an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and in the **Action** column, click **View**.
   - A pending order can be modified, put on hold, canceled, or invoiced and shipped.
   - A completed order can be reordered and archived.



Orders

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.

2. **Order Pending.** In the Orders grid, the status of the sales order is initially “Pending.” Payment has not been processed, and the order can still be canceled.

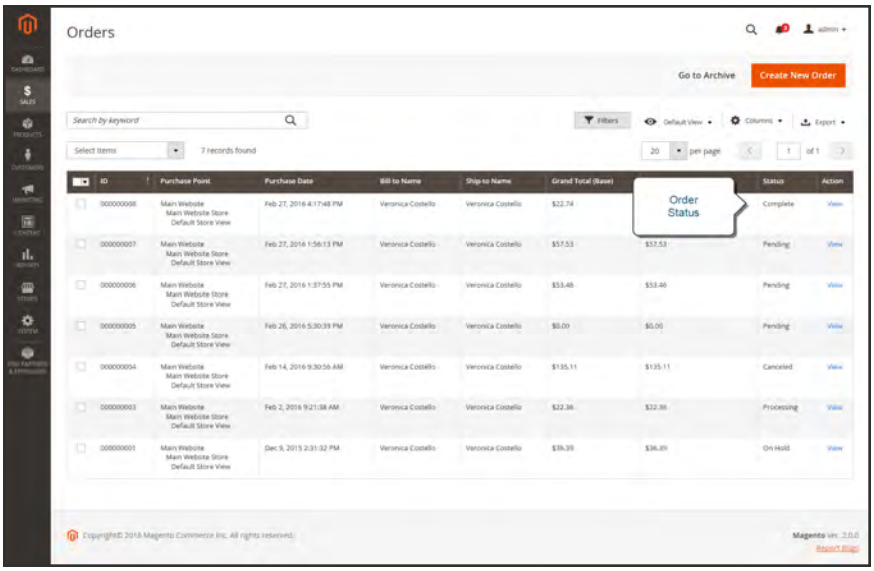
3. **Receive Payment.** The status of the order changes to “Processing.” when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

4. **Invoice Order.** An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.

5. **Ship Order.** The shipment is submitted, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer’s account.

Order Status

All orders have an order status that is associated with a stage in the order processing workflow. The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the workflow.

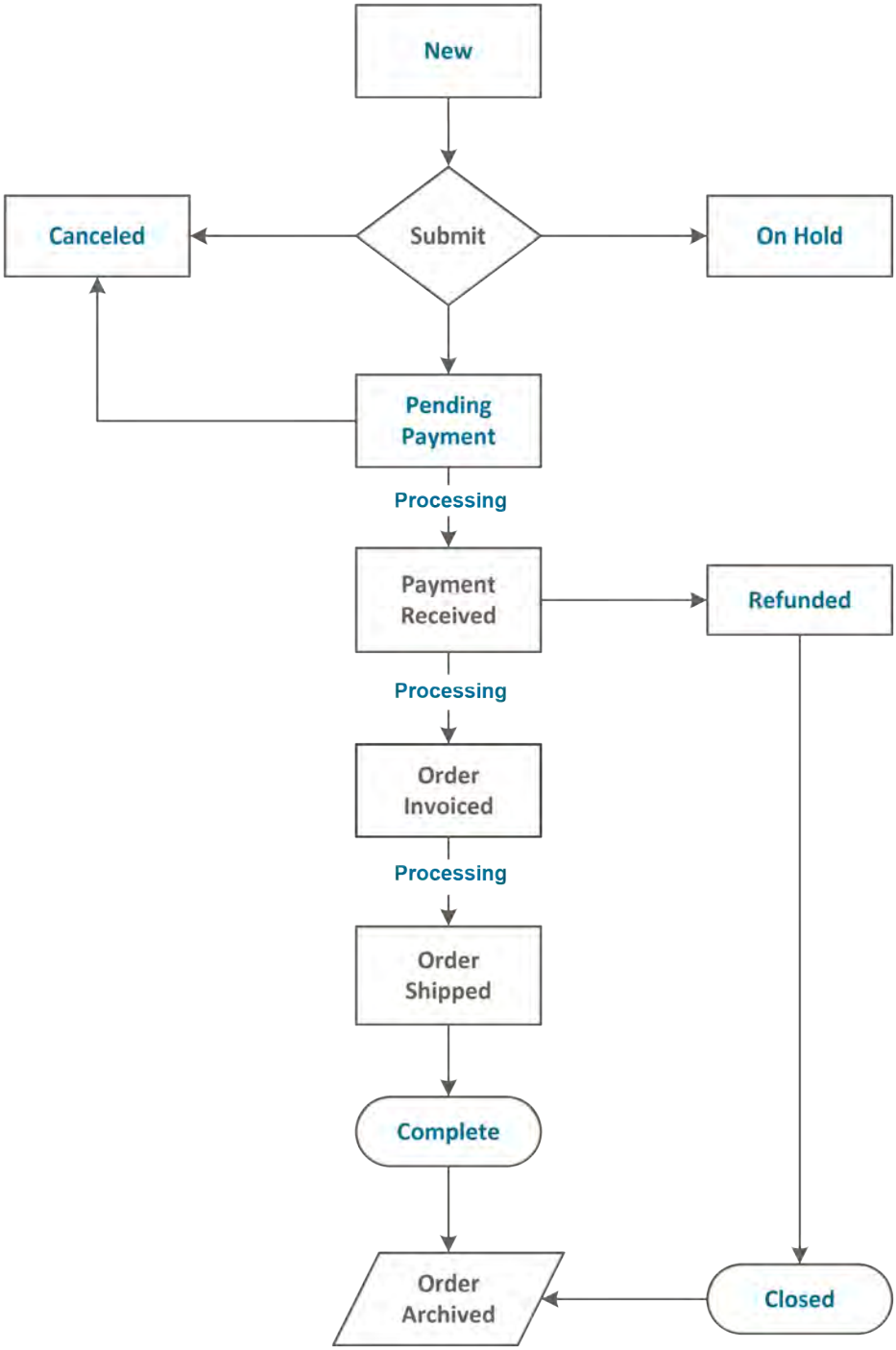


Order Status

Predefined Order Status

ORDER STATUS	ORDER STATE
Processing	New
Suspected Fraud	Pending Payment
Pending Payment	Processing
Payment Review	Complete
Suspected Fraud	Closed
Pending	Canceled
On Hold	On Hold
Complete	Payment Review
Closed	
Canceled	
PayPal Canceled Reversal	
Pending PayPal	
PayPal Reversed	

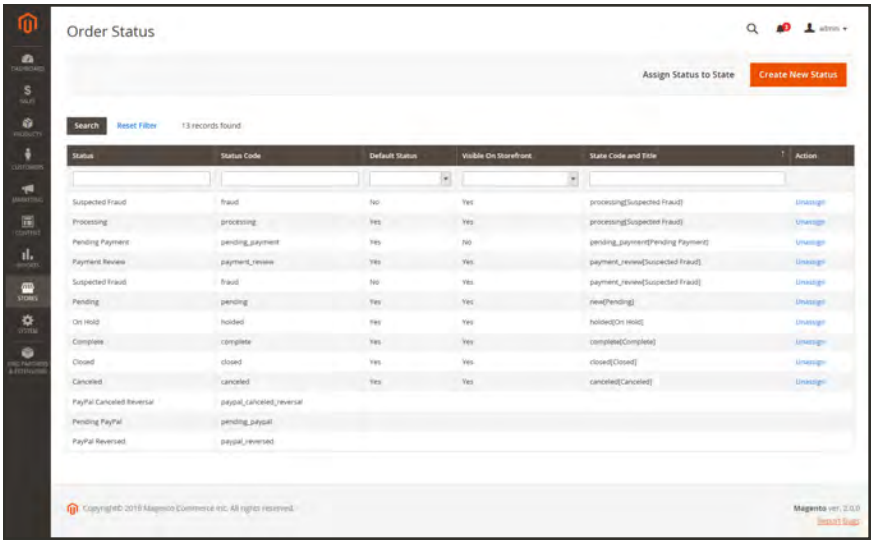
Order Status Workflow



Custom Order Status

In addition to the preset order status settings, you can create custom order status settings of your own, assign them to order states, and set a default order status for order states. For example, you might need a custom order status for orders such as “packaging” or “backordered,” or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

> Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.



Order Status Settings

To create a custom order status:

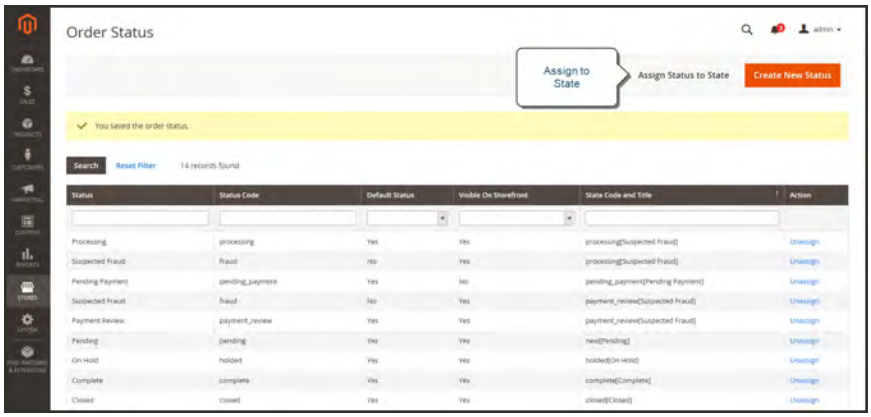
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Order Status**.
2. In the upper-right corner, tap **Create New Status**.

Create New Order Status

3. Under Order Status Information section, do the following:
   a. Enter a **Status Code** for internal reference. The first character must be a letter (a-z), and the rest can be any combination of letters and numbers (0-9). Use the underscore character instead of a space.
   b. Enter a **Status Label** to identify the status setting in both the Admin and storefront.
4. In the **Store View Specific Labels** section, enter any labels needed for different store views and languages.
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. Select the **Order Status** that you want to assign. They are listed by status label.
   b. Set **Order State** to the place in the workflow where the order status belongs.
   c. To make this status the default for the order state, mark the **Use Order Status as Default** checkbox.
   d. To make this status visible from the storefront, mark the **Visible On Storefront** checkbox.



Assign Status to State

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

To edit an existing order status:

1. In the Order Status grid , open the status record in edit mode.
2. Update the status settings as needed.
3. When complete, tap **Save Status**.

To remove an order status from an assigned state:

> A status setting cannot be unassigned from a state if the status is currently in use.

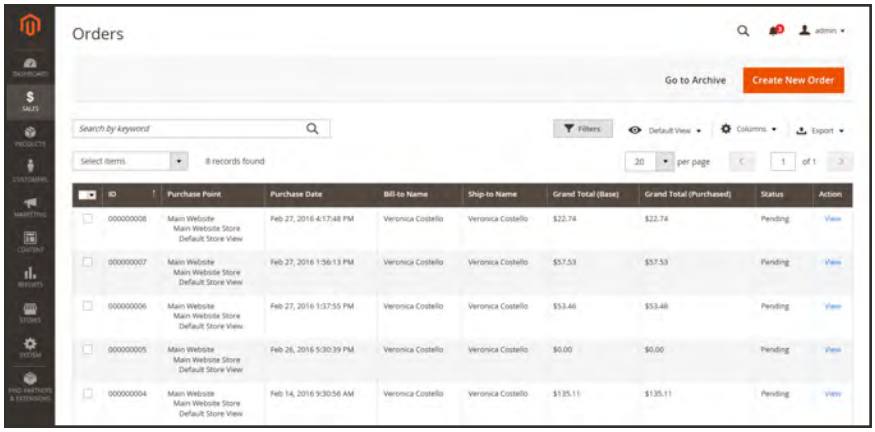
1. In the Order Status grid, find the order status record to be unassigned.
2. In the Action column on the far right of the row, tap the **Unassign** link.

   A message appears at the top of the workspace that the order status has been unassigned. Although the order status label still appears in the list, it is no longer assigned to a state. Order status settings cannot be deleted.

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.

Orders Cron Settings

4. In the **Pending Payment Order Lifetime (minutes)** field, enter the number of minutes before a pending payment expires.
5. When complete, tap **Save Config**.

Scheduled Grid Updates

The Grid Settings configuration schedules updates to the following order management grids, and reindexes the data as scheduled by Cron:

- Orders
- Invoices
- Shipments
- Credit Memos

The benefits of scheduling these tasks is to avoid the locks that occur when data is saved, and to reduce processing time. When enabled, any updates take place only during the scheduled cron job. For best results, Cron should be configured to run once every minute.

To enable scheduled grid updates and reindexing:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Grid Settings** section.
4. Set **Asynchronous Indexing** to "Enable."

Grid Settings

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

Notes

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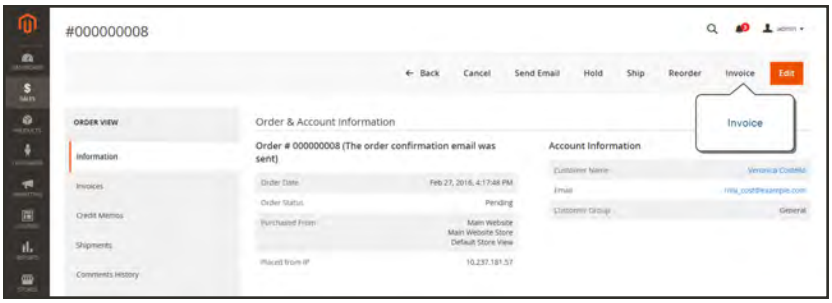
Invoices

An invoice is a record of the record of payment for an order. The Invoices grid lists each invoice that has been generated. During the invoicing process, a temporary sales order is converted into a permanent record of the order that cannot be canceled. A new invoice page looks similar to a completed order, but with some additional fields. Multiple invoices can be created for a single order, with each invoice including only the items that are ready to be invoiced. Every activity that is related to an order can be noted in the Comments section.

Some credit card payment actions complete the invoicing step as part of the transaction 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.



Invoice Order

Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	When an invoice is submitted, the system captures the payment from the third-party payment gateway. You can create a credit memo and void the invoice.
Capture Offline	When an 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 can capture the payment through Magento. You can create a credit memo, but cannot void the invoice. (Even though the order used an online payment, the invoice is essentially an offline invoice.)
Not Capture	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. A Capture button appears in the completed invoice. Before capturing, can cancel the invoice. After capturing you can create a credit memo and void the invoice. 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 by using the Capture button.

Invoicing an Order

Before an invoice can be printed, it must first be generated for the order. To view or print a print-ready PDF invoice, first download and install a PDF reader such as Adobe Acrobat Reader. You can upload a high-resolution logo for the invoice, and include the Order ID in the header, and also customize the invoice template with your company logo and address.

To generate an invoice:

1. On the Admin sidebar, tap **Sales**. Then, choose **Orders**.
2. Find the order in the grid, and do the following:
   a. In the **Action** column, click the **View** link.
   b. In the upper-right corner, tap **Invoice**. The new invoice page looks similar to a completed order page, but with additional fields that can be edited.
3. To ship a partial order, do the following:
   a. enter the **Qty to Invoice** for each item that is to be shipped at this time.
   b. Tap **Update Qty's**.

Items to Invoice

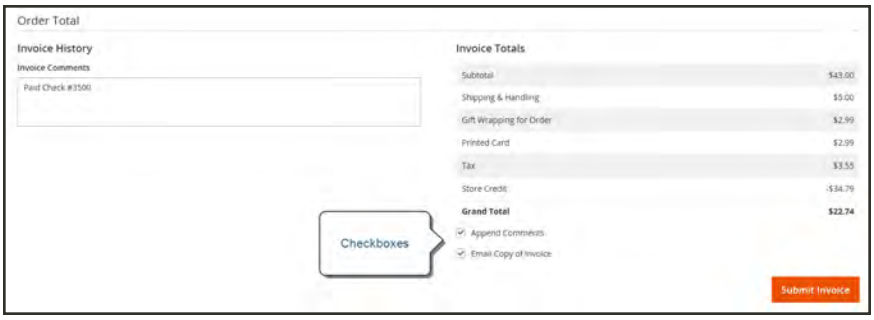
4. To create a record of the shipment at the same time the invoice is generated, do the following:
   a. In the Shipping Information section, mark the **Create Shipment** checkbox.
   b. To include a tracking number, tap **Add Tracking Number** . Then, enter the following:
      - Carrier
      - Title
      - Number

Create Shipment

5. To add a comment to the invoice, scroll down to the Order Total section, and enter the **Invoice Comments**.

Adding a Comment

6. If an online payment method was used for the order, set Amount to the appropriate option.
7. To notify customers by email when the invoice is generated, do the following:
   a. Mark the **Email Copy of Invoice** checkbox.
   b. To include the invoice comments in the email notification, mark the **Append Comments** checkbox.
8. When complete, tap **Submit Invoice**. The status of the order changes from "Pending" to "Complete."

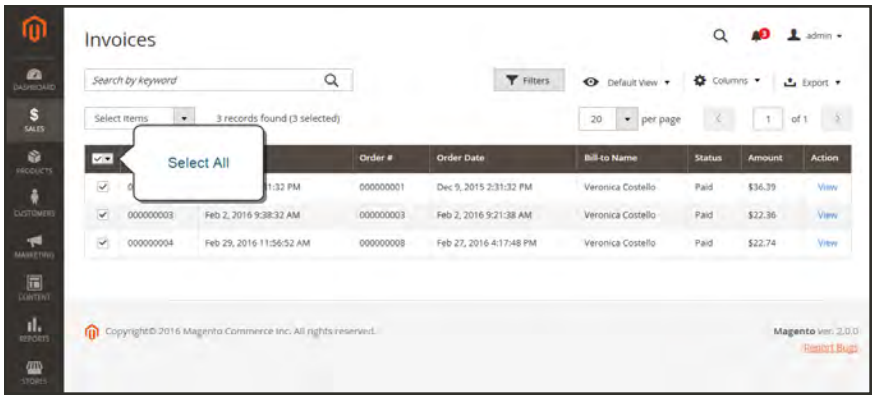


Submit Invoice

When complete, the new invoice appears at the top of the Invoices grid.

Printing Invoices

Invoices can be printed individually or as a batch. Multiple invoices are saved in a single PDF file. Before an invoice can be printed, it must first be generated for the order.



Select All

To print a single invoice:

Method 1: Print from the Grid

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Invoices**.
2. Find the invoice in the **Invoices** grid, and mark the checkbox.
3. Set the **Actions** control to "Print Invoices."
4. Look for the message at the bottom of the screen, and tap **Open**.

Method 2:Open the Invoice

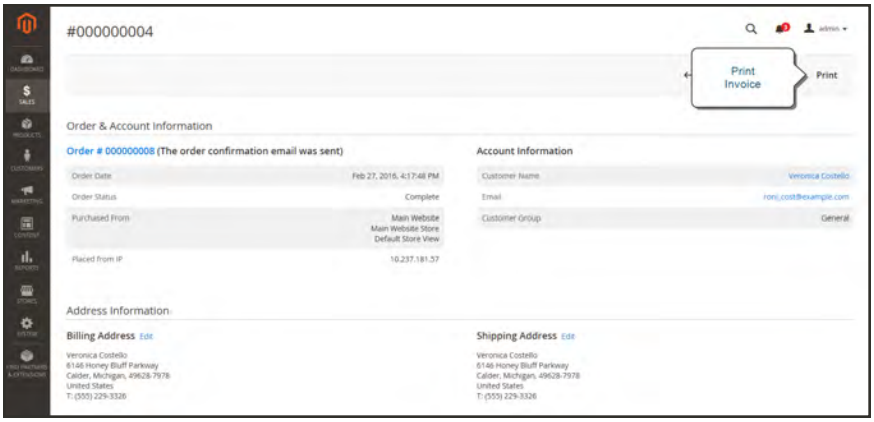
1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Invoices**.
2. Find the invoice in the **Invoices** grid, and click **View**.
3. In the upper-right corner, tap **Print**.
4. Look for the message at the bottom of the screen, and tap **Open**.

Method 3: Open the Order

This can be used when there are multiple invoices for a single order.

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the completed order in the **Orders** grid, and click **View**.

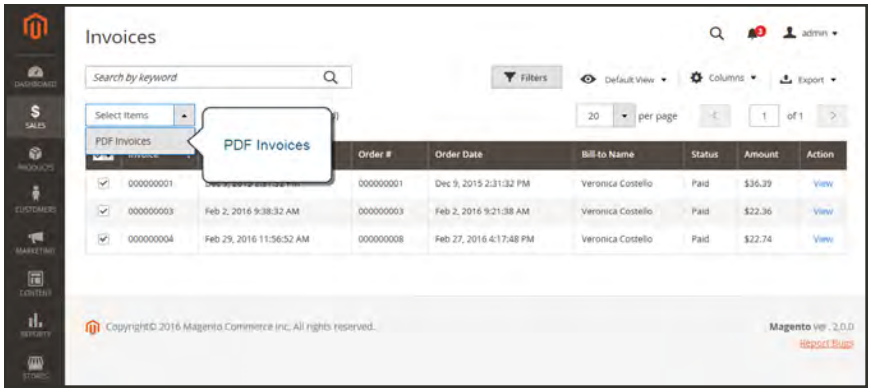
3. In the panel on the left, choose **Invoices**.Then, find the invoice in the grid and click **View**.
4. In the upper-right corner, tap **Print**.
5. Look for the message at the bottom of the screen, and tap **Open**.



Print Invoice

To print multiple invoices:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Invoices**.
2. In the **Invoices** grid, do one of the following:
   - Mark the checkbox of each invoice to be printed.
   - Set the Mass Actions control to “Select All.”
3. Set the **Actions** control to “Print Invoices.”



Print PDF Invoices

4. Look for the message at the bottom of the screen, and tap **Open**.
5. You can scroll down through the PDF to see the multiple invoices. The invoices can be printed as a batch, as individual pages, or as a range of pages.

LUMA

Magento
10441 Jefferson Blvd, Suite 200
Culver City, CA 90232

Invoice # 000000004
Order # 000000003
Order Date: Feb 2, 2016

Sold to:	Ship to:
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326

Payment Method	Shipping Method:
Check / Money order	Flat Rate - Fixed (Total Shipping Charges $5.00)

Products	SKU	Price	Qty	Tax	Subtotal
Luma Mailed Gift Card	243-MB04	$25.00	1	$0.00	$25.00

Subtotal:	$25.00
Shipping & Handling:	$5.00
Store Credit:	$7.64
Grand Total:	$22.36

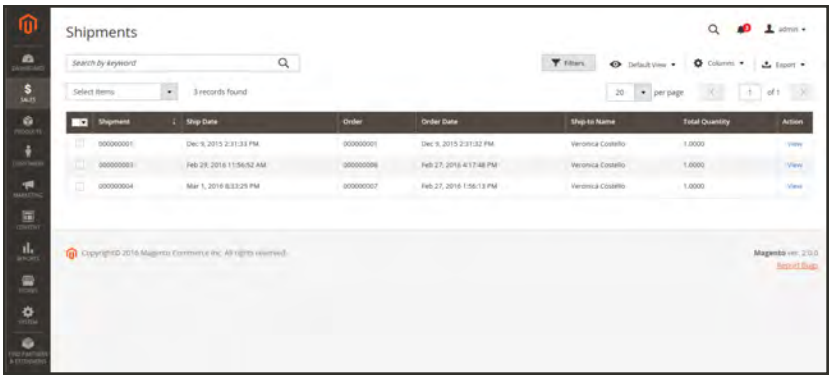
PDF Invoice with Logo

Notes

CHAPTER 59:

Shipments

The Shipments grid lists the shipment record of all orders that have been prepared for shipping. A shipment record can be generated when an order is invoiced, or at another point in the workflow. For transactions that are invoiced when the payment method is set to “Authorize and Capture,” a shipment can be created directly from the order without generating an invoice.



Shipments

Creating a Shipment

Method 1: Create a Shipment with Invoice

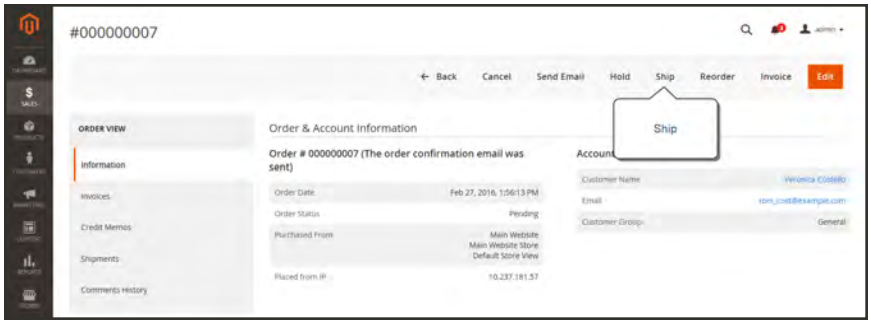
1. To create a shipment record at the same time the invoice is generated, follow the instructions to invoice an order.
2. Mark the **Create Shipment** checkbox, and complete the tracking information as needed.

Create Shipment

3. Complete the remaining fields as needed, and tap **Submit Invoice**.

Method 2: Create a Shipment Without Invoice:

1. On the Admin sidebar, tap **Sales**. Then choose **Orders**.
2. Find the order in the Orders grid, and click **View**.
3. At the top of the workspace, tap **Ship**.

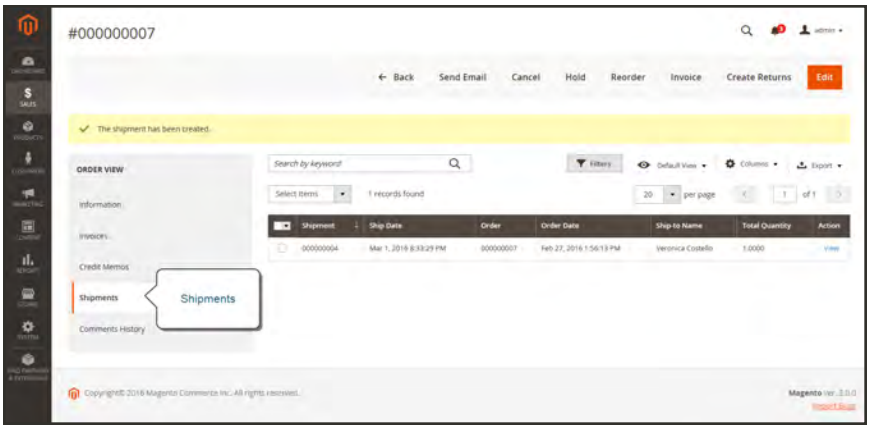


Create Shipment from Order

4. Scroll down to the **Shipping Information** section. Then, tap **Add Tracking Number**, and complete the information as needed.
5. Under **Items to Ship**, update the **Qty to Ship** if shipping a partial order.
6. Under **Shipment Total**, enter any **Comment Text** that is needed. Then mark the following checkboxes that apply to the shipment:

- Append Comments
- Email Copy of Shipment

7. When complete, tap **Submit Shipment**.
8. To access the shipment information from the Order, choose **Shipments** in the panel on the left. The Shipment also now appears in the Shipments grid.



Shipment

Notes

CHAPTER 60:

Credit Memos

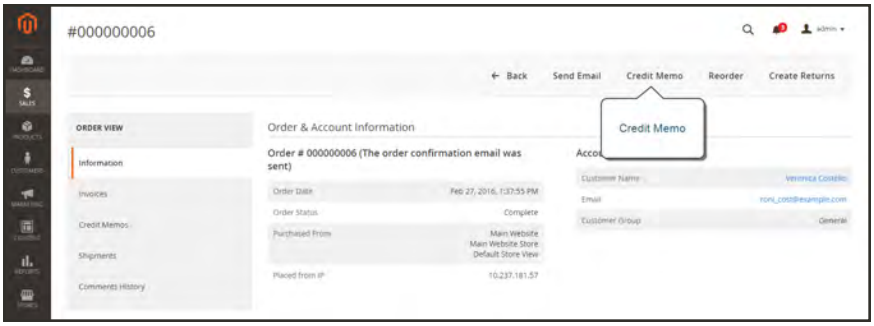
A credit memo is a document that shows the amount that is owed to the customer. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. The credit memo grid lists the credit memos that have been issued to customers, and customers can view the refund or store credit from the dashboard of their account.

Credit Memos

To issue a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order in edit mode.
3. In the upper right corner, tap **Credit Memo**. (The Credit Memo button appears only for completed orders.)

   The New Credit Memo page looks similar to a completed order, but with an Items to Refund section that lists each item from the invoice.



Create Credit Memo

4. Do one of the following:
   - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
   - If the product will not be returned to inventory, leave the checkbox blank.

   The Return to Stock checkbox appears only if inventory Stock Options are set to "Decrease Stock When Order Is Placed."

   > If an online payment method was used, you will not be able to mark the checkbox.

Items to Refund

5. Complete the following:
   a. If the quantity of products to be refunded is less than the quantity purchased, enter the number of items to be returned in the **Qty to Refund** box. Then, press the **Enter** key to record the change. The Update Qty's button appears.

> If applicable, make sure to set the **Qty to Refund** of any items not to be refunded to zero.

b. Tap **Update Qty's** to recalculate the total. (The amount to be credited cannot exceed the maximum quantity that is available for refund.)

6. In the **Refund Totals** section, do the following, as applicable:

   a. In the **Refund Shipping** field, enter the amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.

   b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping or tax. The amount entered cannot raise the total refund higher than the paid amount.

   c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.

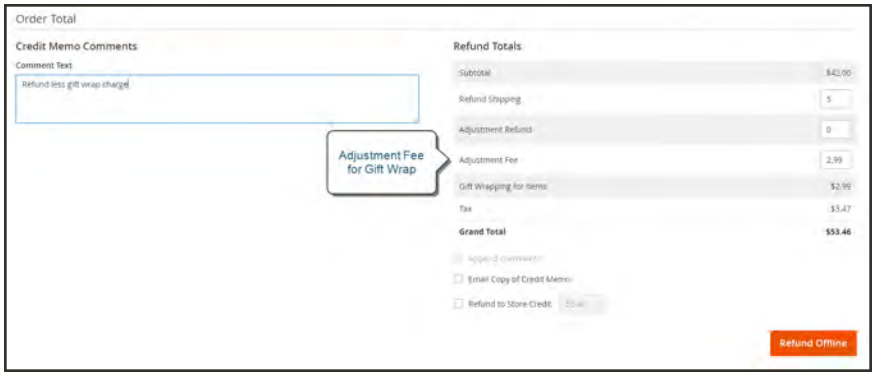
   d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer's account balance.

   e. To add a comment, enter the text in the **Credit Memo Comments** box.

   f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.

   g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

   The status of a credit memo notification appears in the completed credit memo next to the credit memo number.



Refund Totals

7. To explain the refund, enter the text in the **Comment Text** box.

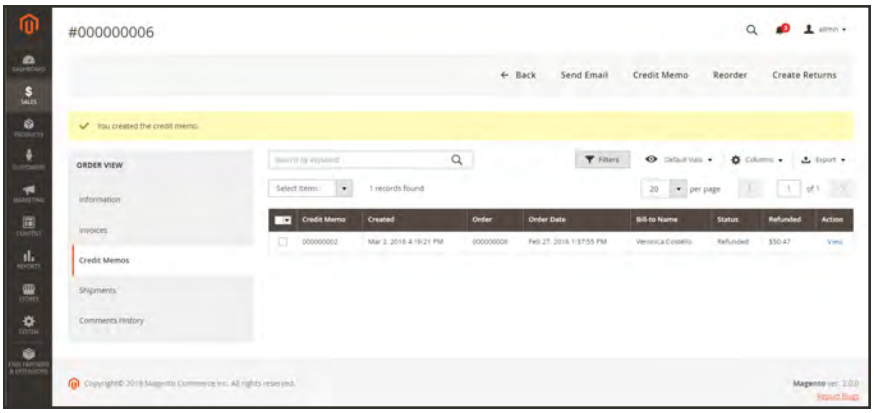
- To send the comment to the customer by email, mark the **Email Copy of Credit Memo**checkbox.

To refund the amount to the customer's store credit, mark the **Refund to Store Credit** checkbox. Then if applicable, enter the amount to be refunded to store credit.

8. To complete the process and generate the credit memo, tap one of the following refund buttons that appears according to the payment type:

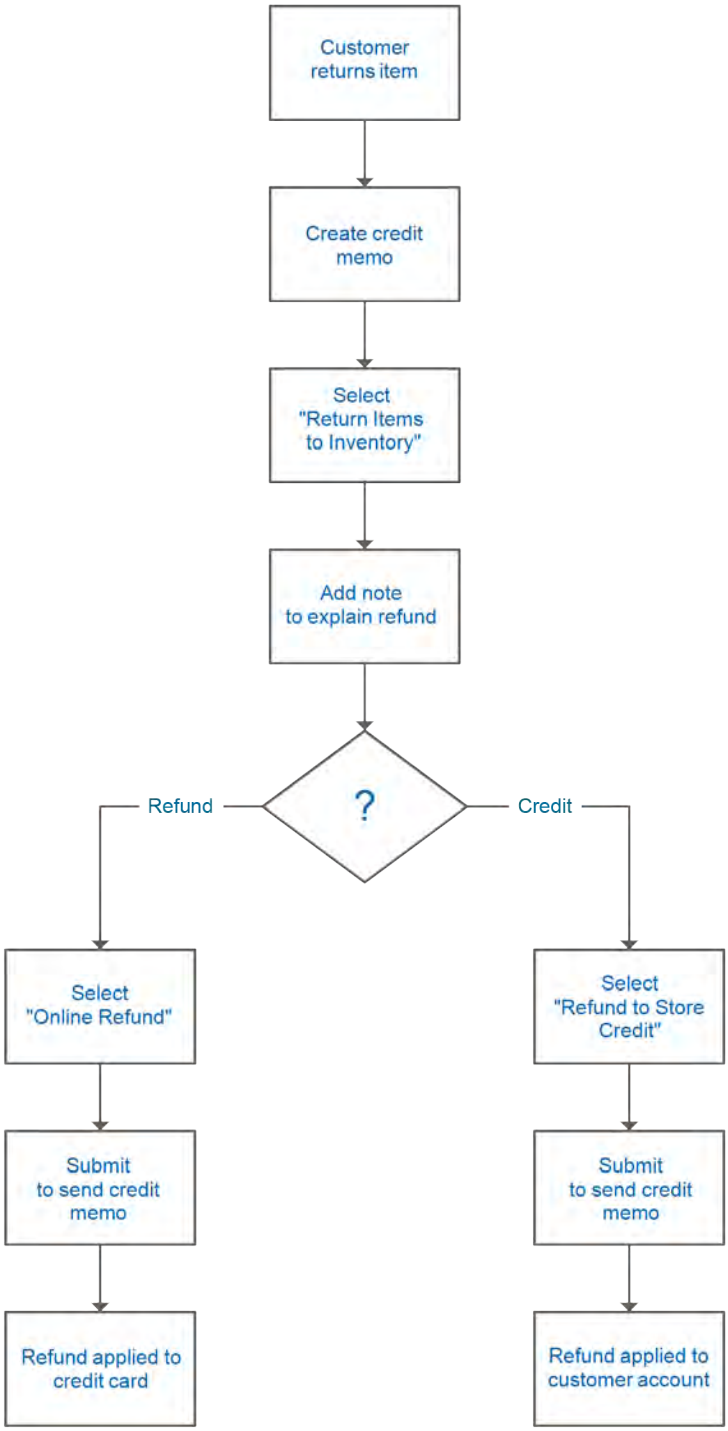
- Refund Offline
- Refund Online

You can view the completed credit memo from the **Credit Memo** tab of the order, and also in the main **Credit Memos** grid. For a hard copy of the credit memo, see: Printing Credit Memos.



Saved Credit Memo

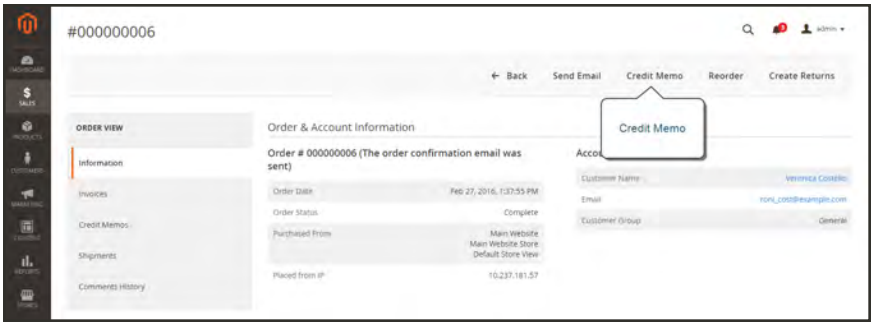
Product Return Workflow



Product Return Workflow

Issuing a Credit Memo

Before a credit memo can be printed, it must first be generated for the order. If you create a credit memo for an order that includes gift options, the refund for the gift wrapping and/or printed card appears in the Refund Totals section of the credit memo. To exclude these costs from the amount to be refunded, enter the amount as an Adjustment Fee. If multiple credit memos are issued for the same order, the refund for gift options appears in the first credit memo.



Create Credit Memo

To issue a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order in edit mode.
3. In the upper right corner, tap **Credit Memo**. (The Credit Memo button appears only for completed orders.)

   The New Credit Memo page looks similar to a completed order, but with an Items to Refund section that lists each item from the invoice.
4. Do one of the following:
   - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
   - If the product will not be returned to inventory, leave the checkbox blank.

   The Return to Stock checkbox appears only if inventory Stock Options are set to “Decrease Stock When Order Is Placed.”

   > If an online payment method was used, you will not be able to mark the checkbox.

Items to Refund

5. Complete the following:

   a. If the quantity of products to be refunded is less than the quantity purchased, enter the number of items to be returned in the **Qty to Refund** box. Then, press the **Enter** key to record the change. The Update Qty's button appears.

   > If applicable, make sure to set the **Qty to Refund** of any items not to be refunded to zero.

   b. Tap **Update Qty's** to recalculate the total. (The amount to be credited cannot exceed the maximum quantity that is available for refund.)

6. In the **Refund Totals** section, do the following, as applicable:

   a. In the **Refund Shipping** field, enter the amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.

   b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping or tax. The amount entered cannot raise the total refund higher than the paid amount.

   c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.

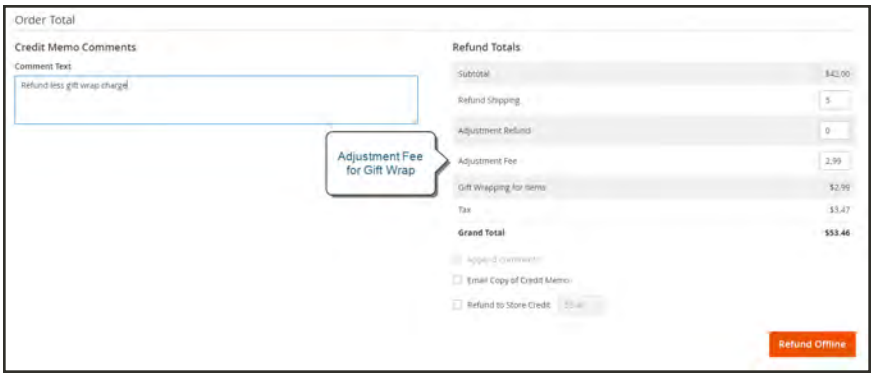
   d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer's account balance.

   e. To add a comment, enter the text in the **Credit Memo Comments** box.

   f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.

   g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

   The status of a credit memo notification appears in the completed credit memo next to the credit memo number.



Refund Totals

7. To explain the refund, enter the text in the **Comment Text** box.

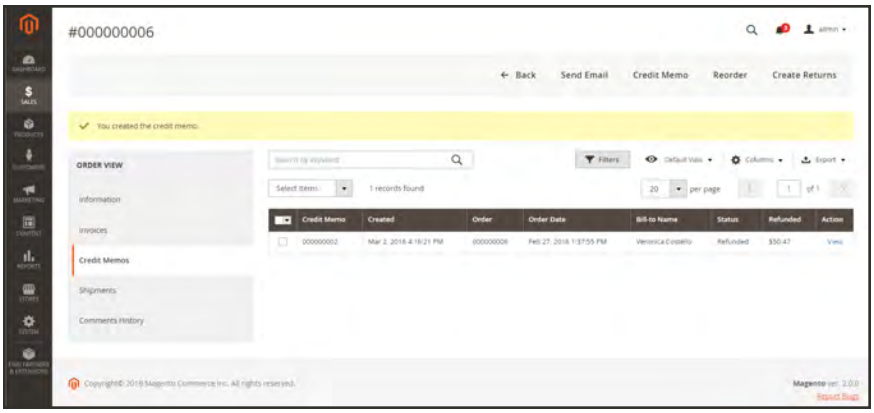
   - To send the comment to the customer by email, mark the **Email Copy of Credit Memo** checkbox.

   To refund the amount to the customer's store credit, mark the **Refund to Store Credit** checkbox. Then if applicable, enter the amount to be refunded to store credit.

8. To complete the process and generate the credit memo, tap one of the following refund buttons that appears according to the payment type:

   - Refund Offline
   - Refund Online

   You can view the completed credit memo from the **Credit Memo** tab of the order, and also in the main **Credit Memos** grid. For a hard copy of the credit memo, see: Printing Credit Memos.



Saved Credit Memo

Printing Credit Memos

To print the completed credit memo, you must have a PDF reader installed on your computer. You can download Adobe Reader at no charge.

Credit Memos

To print a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. Use one of the following methods to print the credit memo:

Method 1: Print from the Grid

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. In the list, mark the checkbox of each credit memo that you want to print.
3. Set the **Actions** control to "PDF Credit Memos. Then, tap **Submit**.
4. 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.

Method 2: Open the Credit Memo

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. Find the credit memo in the **Credit Memos** grid, and click **View**.
3. Tap **Print**.

Method 3: Open the Order

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. Find the completed order in the **Orders** grid, and click **View**.

3. In the panel on the left, choose **Credit Memos**.
4. Do one of the following:
   - Find the credit memo in the grid, and click View. Then, ,tap **Print**.
   - Mark the checkbox of each credit memo to print. Then, set the Actions control to **PDFcreditmemos**.
5. When the PDF credit memo opens in a new window, tap the **Print** button in the toolbar to send it to your printer.


LUMA

Magento
10441 Jefferson Blvd, Suite 200
Culver City, CA 90232

Credit Memo # 000000007
Order # 000000006
Order Date: Feb 27, 2016

Sold to:	Ship to:
Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326	Veronica Costello 6146 Honey Bluff Parkway Calder, Michigan, 49628-7978 United States T: (555) 229-3326

Payment Method	Shipping Method:
Check / Money order	Flat Rate - Fixed (Total Shipping Charges $5.00)

Products	SKU	Total (ex)	Discount	Qty	Tax	Total (inc)
Beaumont Summit Kit *Color* Orange *Size* L	MJ01-L-Orange	$42.00	$0.00	1	$3.47	$45.47

Subtotal	$42.00
Tax	$3.47
Shipping & Handling	$5.00
Adjustment Fee	$2.99
Grand Total	$50.47
Refunded to Store Credit	$50.47

PDF Credit Memo

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.

Paying with Store Credit

1. **Customer Login.**. Customer logs into account before beginning the checkout process.

2. **Use Store Credit.** During the Review & Payments step of the checkout process, the customer elects to “Use Store Credit” as a payment option. The available balance is shown in parentheses If the available balance is greater than the order grand total, the other payment methods disappear.

3. **Credit Applied to Order.** The amount of store credit that is applied to the order appears with the order totals, and is subtracted from the grand total.

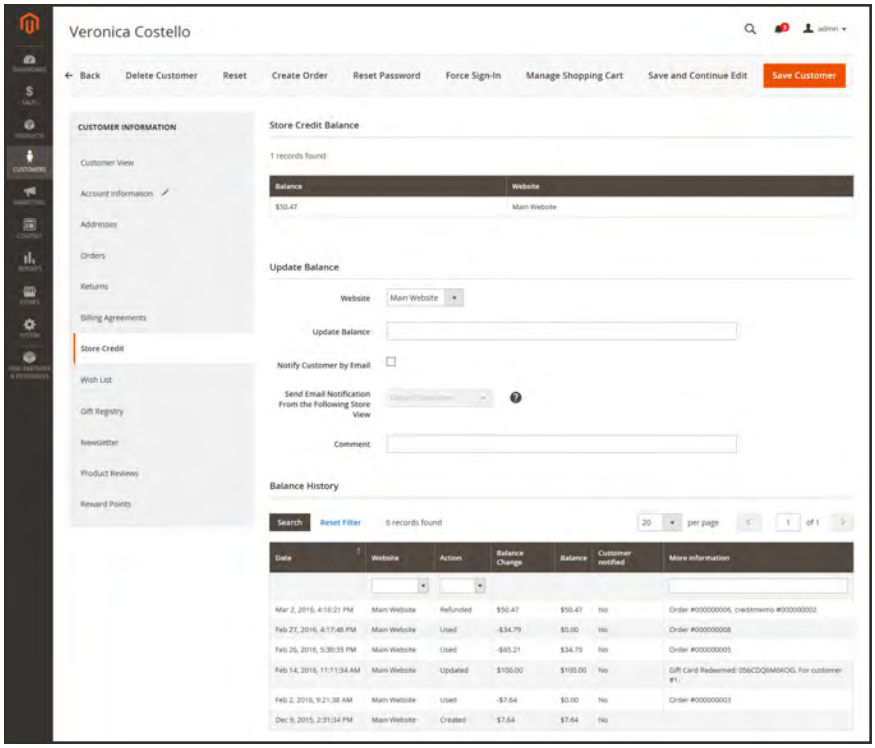
4. **Customer Balance Adjusted.** The customer’s available balance is adjusted when the order is placed.

   Orders paid with store credit cannot be refunded, and credit memos cannot be issued. To refund such an order, the order must be canceled and the balance manually added to the customer’s account. If an order is partially paid with store credit, the amount paid with store credit cannot be refunded. Again, the amount must be manually be added to the customer’s account.

5. **Managing Refunds.** Orders paid with store credit cannot be refunded, nor can credit memos be issued. To refund such an order, the order must be canceled and the balance manually added to the customer’s account. If an order is partially paid with store credit, the amount paid with store credit cannot be refunded. Again, the amount must be manually be added to the customer’s account.

Applying Store Credit

Administrators can view the credit balance and history from the account of a customer, and also apply store credit to a purchase.



Customer Credit Balance and History

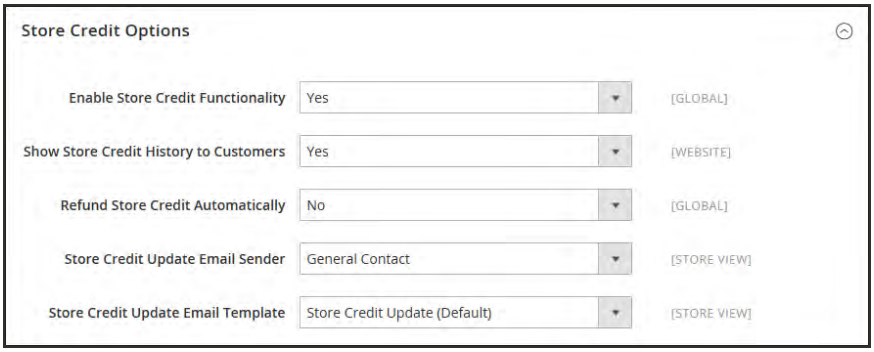
To view the credit balance:

1. On the Admin sidebar, tap **Customers**. Then under **Operations**, choose **All Customers**.
2. Find the customer In the grid. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose **Store Credit**.

Store Credit Balance

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.



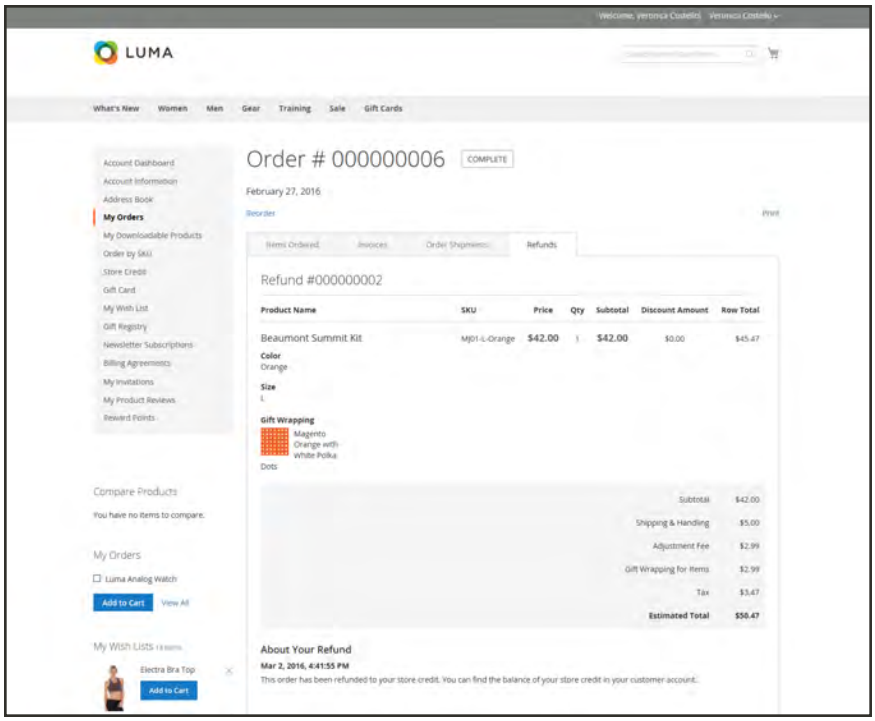
Store Credit Options

To configure store credit:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand the **Store Credit Options** section. Then, do the following:
   a. Set **Enable Store Credit Functionality** to "Yes."
   b. Set the following to your preference:
      - Show Store Credit History to Customers
      - Refund Store Credit Automatically
   c. Set **Store Credit Update Email Sender** to the store identity that appears as the sender of email notifications sent to customers.
   d. Set **Store Credit Update Email Template** to the template that is used for email notifications sent to customers.
4. When complete, tap **Save Config**.

Refunds in Customer Account

Customers can track the status of their refunds and verify the balance of their store credit from the dashboard of their accounts.

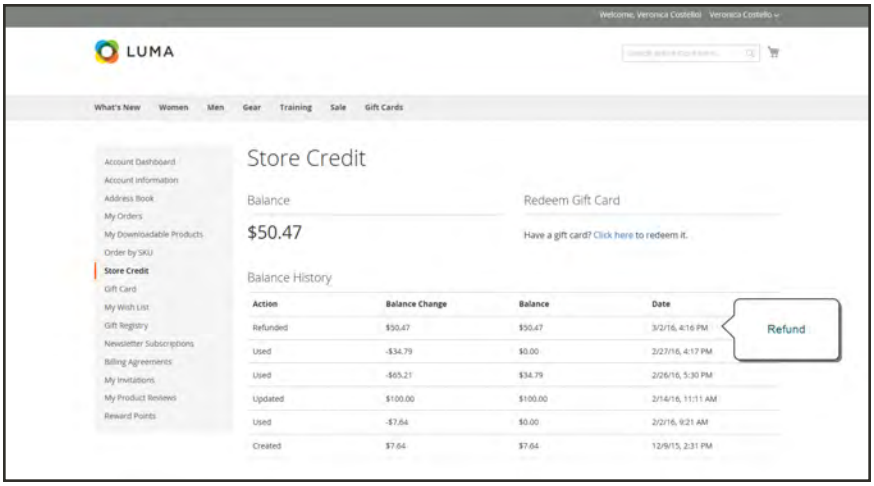


Refund Detail

To view a refund from your customer account:

1. From the storefront, log into your customer account. Then, do one of the following:
   - Find the order in the list of **Recent Orders**, and click **View**.
   - In the panel on the left, choose **My Orders**. Then, find the order in the list and click **View**.
2. Tap the **Refunds** tab to view the details of the refund.
3. If the refund was applied to store credit, choose **Store Credit** in the panel on the left.

   The amount refunded to your store credit appears in the list with the date and time of the action.



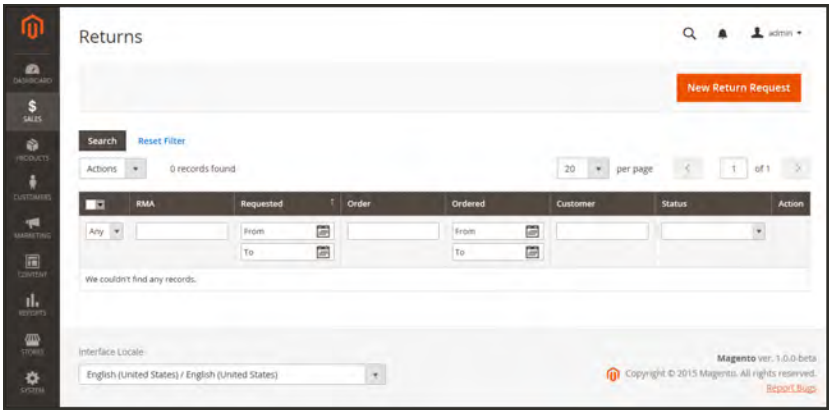
Amount Refunded to Store Credit

CHAPTER 61:

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 return ed merchandise requests (RMAs) , and is used to enter new return requests..

RMAs can be issued for Simple, Grouped, Configurable, and Bundle product types. However, RMAs are not available for virtual products, downloadable products, and gift cards.



Returns

RMA Workflow

1. **Receive Request.** Both registered customers and guests can request an RMA. You can also submit an RMA request from the Admin.

2. **RMA Issued.** After considering the request, you can authorize it partially, completely, or cancel the request. If you authorize the return and agree to pay for the return shipment, you can create a shipment order from the Admin with a supported carrier.

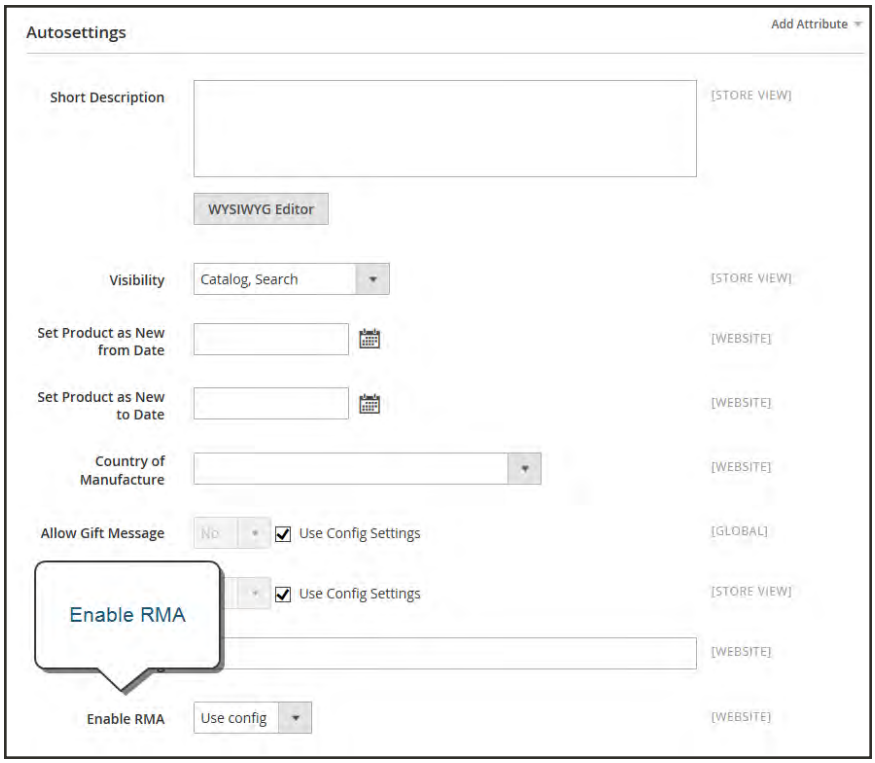
3. **Merchandise Returned.** The customer follows your shipping instructions and returns the merchandise to you,

4. **Receive Merchandise.** You receive and approve the return partially or completely, or cancel the RMA.

Configuring Returns

RMA requests are always available from the Admin, unless they are disabled in the configuration. Customers can submit RMA requests only when enabled in the configuration.

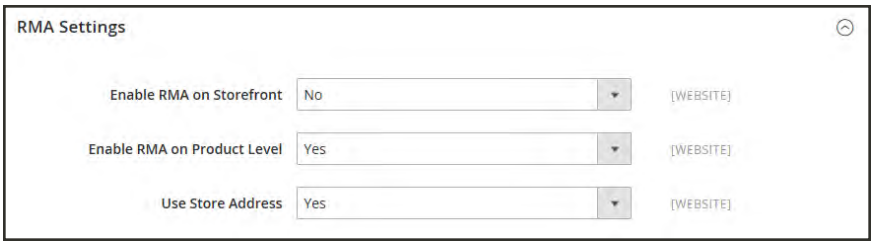
Requests to return individual items are managed by the Enable RMA attribute, which is available in the Advanced Settings section of each product record, under Autosettings. By default, the configuration settings are applied to the product. If Enable RMA is set to "No," the product does not appear in 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.



Enable RMA for Product

To enable RMAs:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under Sales, choose **Sales**.
3. Expand the **RMA Settings** section. Then, do the following:



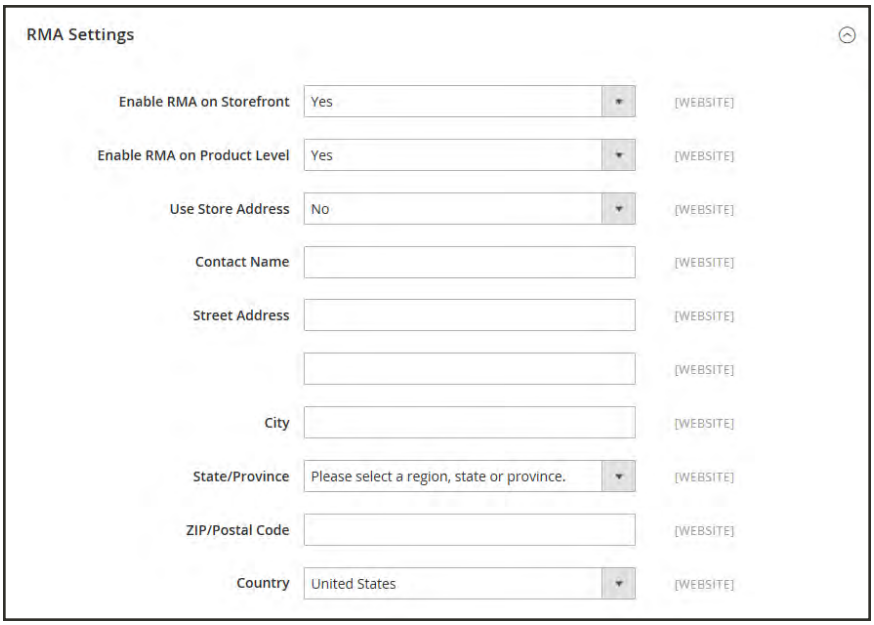
RMA Settings

a. Set **Enable RMA on Storefront** to "Yes."

b. Set **Enable RMA on Product Level** to "Yes."

c. Set **Use Store Address** to one of the following:

Yes	Choose "Yes" to have returned products sent to the store address.
No	Choose "No," and enter an alternate address where returned products are to be sent.

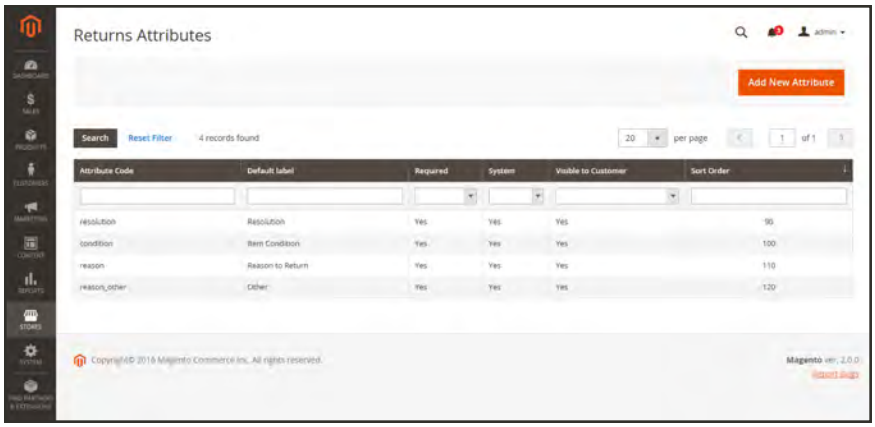


RMA Settings with Alternate Address

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

Returns Attribute

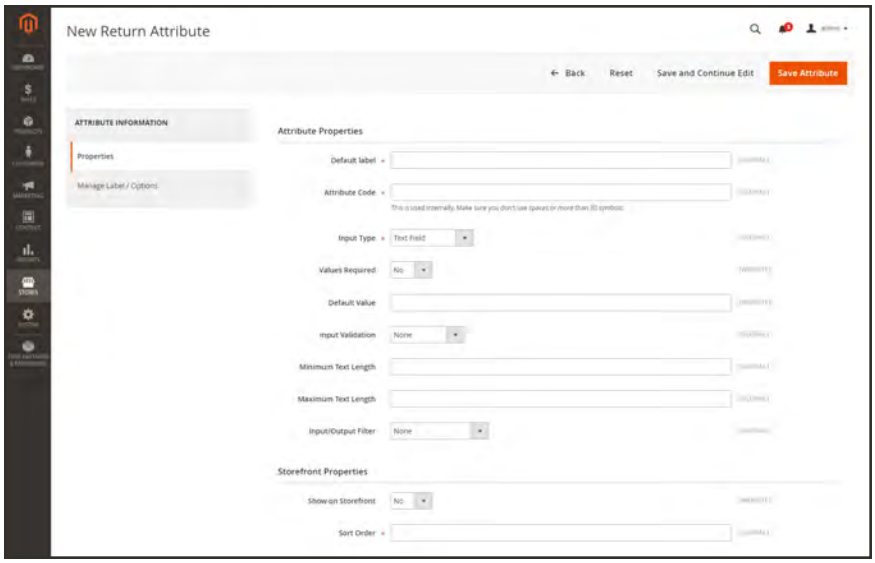
The Returns Attributes are used to store information that is needed during the product return process. The default attributes include the condition of the returned prodct, the reason for the reaturn, and a field that indicates how the return was resolved. The process to create a returns attribute is similar to creating a customer attribute.



Returns Attributes

To create a returns attribute:

1. On the Admin sidebar, choose **Stores**. Then under **Attributes**, choose **Returns**.
2. In the upper-right corner, tap **Add New Attribute**.
3. Follow the same process as you would to create a customer attribute.



New Returns Attribute

Notes

CHAPTER 62:

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.

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. Customers can manage their own billing agreements from the dashboard of their customer account.

Billing Agreements

Notes

CHAPTER 63:

Transactions

The Transactions grid lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

To view transactions:

On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Transactions**.

Transactions

Notes

Payments

Contents

CHAPTER 64:

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

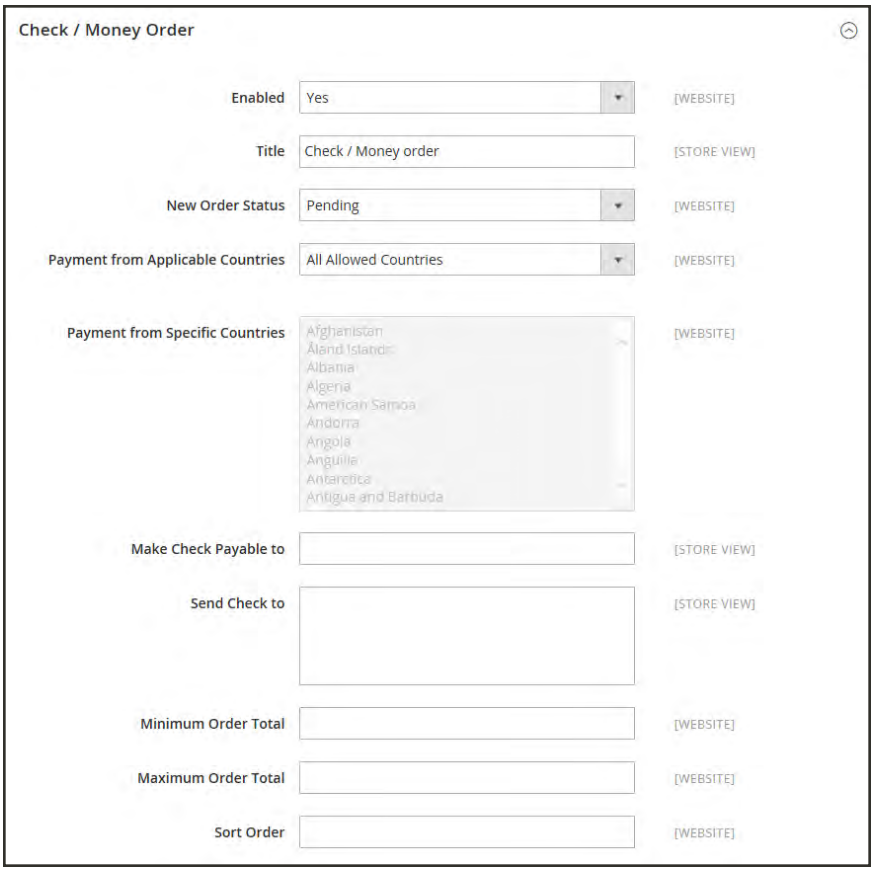
Magento supports a number of offline payment methods, including payment by check or money order, and cash on delivery (COD),

Online Payments

Online payment methods include PayPal, credit cards, and bank transfer.

Check / Money Order

Magento Enterprise Edition 2.0 allows you to accept payments by check or money order. The Check / Money Order payment method is enabled for your story 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

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 Enterprise Edition 2.0 allows you to accept COD payments for purchases. You can accept COD payment from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

The shipping carrier receives payment from the customer at the time of delivery, which is then transferred to you. You can make an adjustment for any fee charged by the carrier service in your shipping and handling charges.

Cash On Delivery Payment

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	Select each country in the list where customers can make purchases from your store.

e. Enter **Instructions** for making a COD payment.

f. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts that are required to qualify for COD payment.

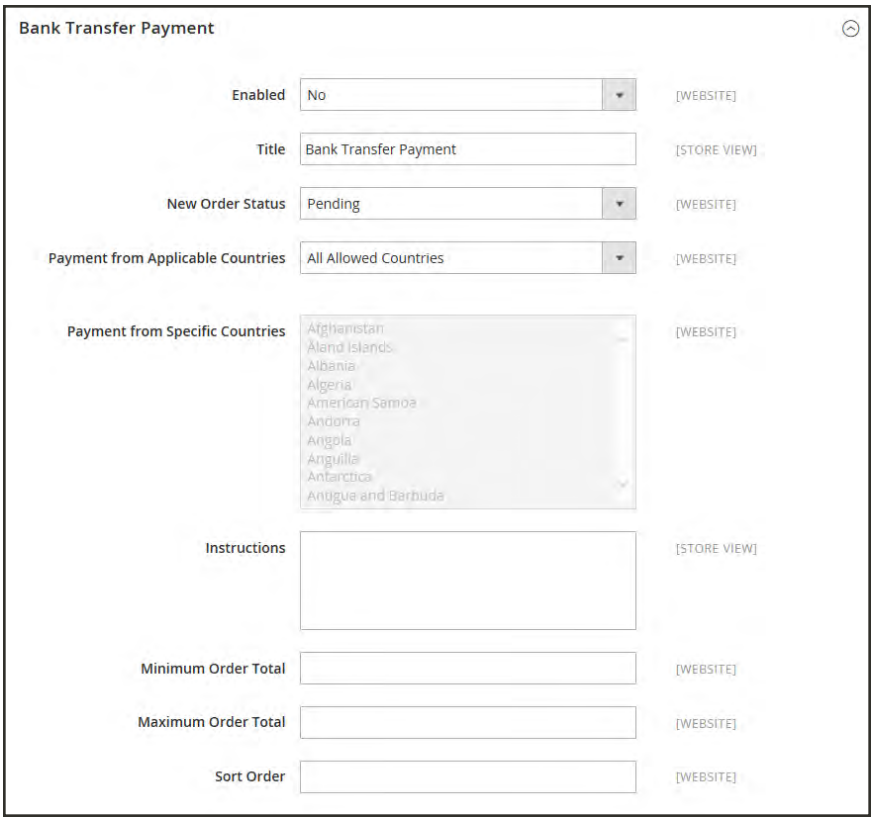
> An order qualifies if the total is between, or matches, the minimum or maximum order total.

g. Enter a **Sort Order** number to determine the sequence in which Cash On Delivery is listed with other payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

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

Bank Transfer

Magento Enterprise Edition 2.0 allows you to accept payment that is transferred from a customer's bank account and deposited into your merchant bank account.



Bank Transfer Payment

To configure bank transfer payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand the **Bank Transfer Payment** section. Then, do the following:
   a. To activate bank transfers, set **Enabled** to "Yes."
   b. Enter a **Title** to identify the Bank Transfer Payment method during checkout.
   c. Set **New Order Status** to "Pending" until payment is authorized.
   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all 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.

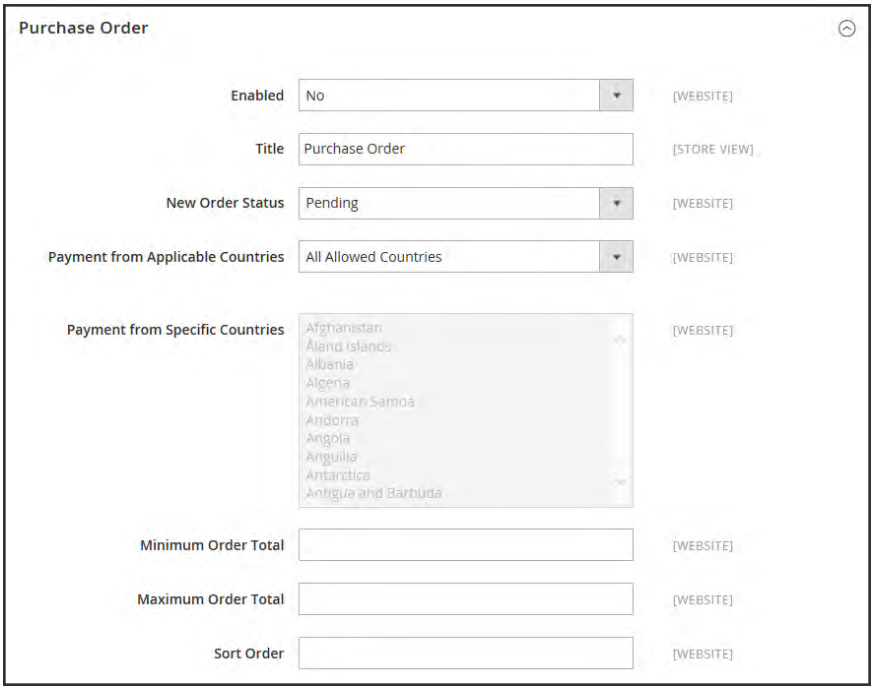
   e. Enter the **Instructions** your customers must follow to set up a bank transfer. Depending on the country where your bank is located and the requirements of the bank, you might need to include the following information:
      - Bank account name
      - Bank account number
      - Bank routing code
      - 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.



Purchase Order

To configure payment by purchase order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand the **Purchase Order** section. Then, do the following:
   a. To activate this payment method, set **Enabled** to "Yes."
   b. Enter a **Title** to identify this payment method during checkout.
   c. Set **New Order Status** to "Pending" until payment is authorized.
   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all 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.

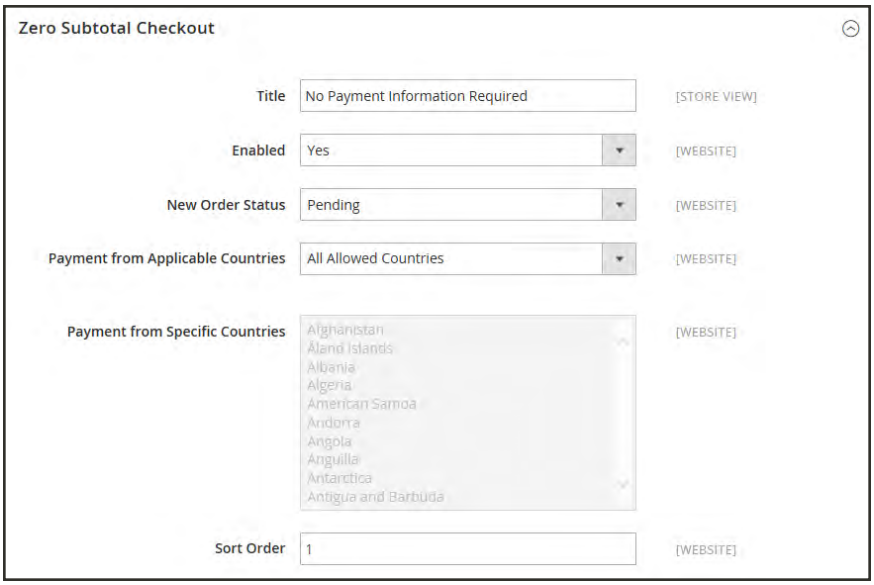
   f. Enter a **Sort Order** number to determine the position of Purchase Order in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

Zero Subtotal Checkout

Zero Subtotal Checkout is available only for orders created from the Admin, and can be used for orders with a subtotal of zero that are taxed after a discount is applied. For example, Zero Subtotal Checkout might be used in the following situations:

- A discount covers the entire price of the purchase, with no additional charge for shipping.
- The customer adds a downloadable or virtual product to the shopping cart, and the price equals zero.
- The price of a simple product is zero, and the Free Shipping method is available.
- A coupon code covers the full price of products and shipping.

To save time, zero subtotal orders can be set to invoice automatically.



Zero Subtotal Checkout

To set up zero subtotal checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Click to expand the **Zero Subtotal Checkout** section. Then, do the following:
   a. Enter a **Title** to identify the Zero Subtotal method during checkout.
   b. Set **Enabled** to "Yes" to activate Zero Subtotal Checkout.
   c. If orders typically wait for authorization, set **New Order Status** to "Pending" until payment is authorized.

Pending	The order is waiting for authorization.
Processing	Payment has been authorized, and the transaction is being processed.

   d. Set **Automatically Invoice All Items** to "Yes" if you want to automatically invoice all items that have a zero balance.
   e. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all 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.

   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**.

Notes

CHAPTER 65:

PayPal

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Enterprise Edition 2.0, you can accept payments from all major debit and credit cards, and PayPal account holders. Since customers don't even need a PayPal account to pay with PayPal, both you and your customers can get extra convenience without extra effort.

The selection of available PayPal solutions varies by merchant location. To learn more, see: PayPal Payment Solutions. PayPal Express Checkout and PayPal Payments Standard can be used in all parts of the world.

> 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 PayPal Payments Standard. PayPal Payments Standard cannot be enabled simultaneously with any other method, including PayPal Express Checkout.

PayPal Business Account

To offer PayPal as a payment method in your store, you must have a PayPal business account and/or a PayPal Payflow account. The account requirements are specified in the description of each PayPal solution. Your PayPal merchant account is also used to manage any fraud filters that are applied to purchases made from your store.

Customers who use PayPal Express Checkout or Express Checkout for Payflow Pro must have a PayPal buyer account. PayPal Payments Standard (which is some countries is called Website Payments Standard) can be used directly or through a buyer account, provided that the merchant enables PayPal Account Optional. By default, this parameter is enabled. Customers can choose to enter their credit card information, or create a buyer account with PayPal. When disabled, customers must first create a PayPal buyer account before making a purchase.

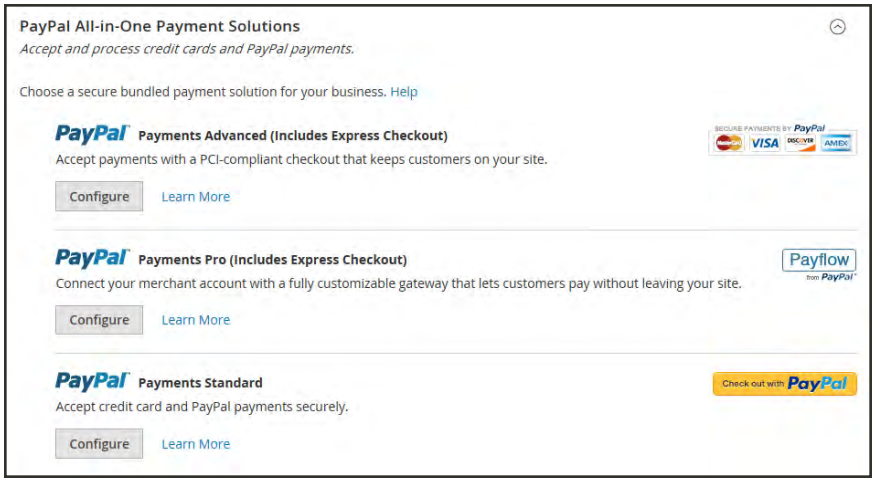
Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require customers to enter credit card information during checkout.

PayPal 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

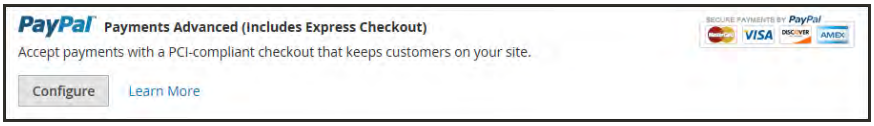
For the solutions available in other countries, see: PayPal Solutions by Country.



PayPal All In One Solutions

PayPal Payments Advanced

PayPal Payments Advanced is a PCI-compliant solution that lets your customers pay by debit or credit card without leaving your site. It includes an embedded checkout page that can be customized to create a seamless and secure checkout experience.



PayPal Payments Advanced

Even customers without a PayPal account can make purchases through PayPal's secure payment gateway. Accepted cards include Visa, MasterCard, Switch/Maestro, and Solo credit cards in the United States and United Kingdom. For additional convenience, PayPal Express Checkout is included with PayPal Payments Advanced.

You can have two PayPal solutions active at the same time: Express Checkout, plus any All-In-One or Payment Gateway solution. If you change payment solutions, the one that was used previously is disabled.

> PayPal Payments Advanced cannot be used for orders created from the Admin of your store.

Checkout Workflow

1. **Customer Chooses Payment Method.** During checkout, the customer chooses to pay with PayPal Payments Advanced. The Pay Now button appears instead of the Place Order button.

2. **Pay Now.** The customer taps Pay Now, and a PayPal-hosted form appears. The customer enters the card information, and the card is verified. If successful, the order confirmation page appears.

   Pay with PayPal. The form also includes the Pay with PayPal button, which redirects the customer to the PayPal site, where payment can be made with PayPal Express Checkout.

3. **Troubleshooting.** If the transaction fails for any reason, an error message appears on the checkout page and the customer is instructed to try again. Any issues are managed by PayPal.

Order Processing Workflow

Processing orders with PayPal Payments Advanced is the same as for any regular PayPal order. Orders are invoiced and shipped, and credit memos generated for both online and offline refunds. However, multiple online refunds are not available for orders paid with PayPal Payments Advanced.

1. **Customer Places Order.** In the final stage of checkout, the customer taps the Place Order button.

2. **PayPal Responds.** PayPal evaluates the request. If found to be valid, PayPal processes the transaction.

3. **Magento Sets Order Status.** Magento receives response from PayPal, and sets the order status to one of the following:

Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the PayPal fraud filters; the system receives the response from PayPal that the transaction is reviewed by PayPal Fraud Service.

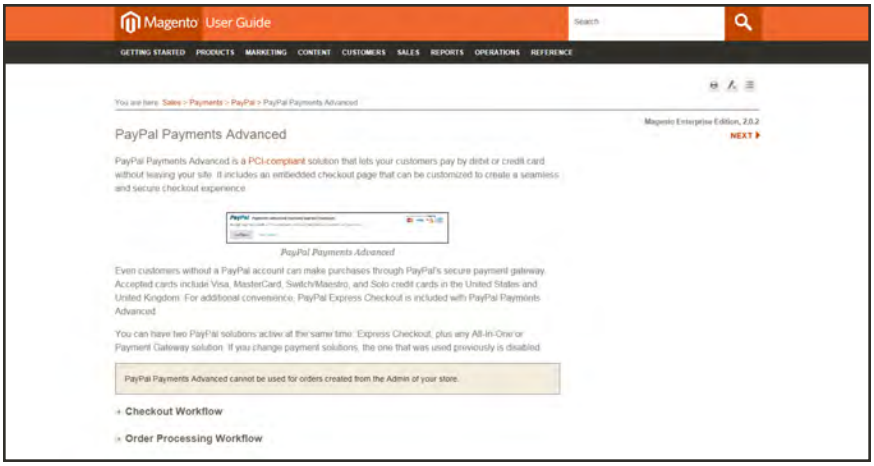
4. **Merchant Fulfills Order.** The merchant invoices and ships the order.

Requirements

- PayPal Business Account
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Setting Up PayPal Payments Advanced

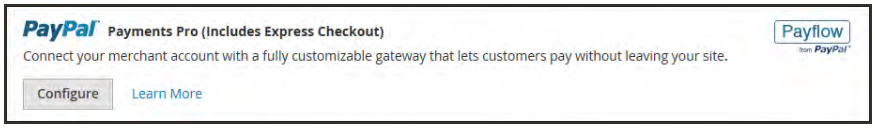
For step-by-step configuration instructions, see PayPal Payments Advanced in the Magento Enterprise Edition 2.0online user guide.



Setting Up PayPal Payments Advanced

PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience. PayPal Express Checkout is automatically enabled with PayPal Payments Pro, so you can tap into more than 110 million active PayPal users.



PayPal Payments Pro

> For merchants outside the US, this method is called “PayPal Website Payments Pro.”

You can have two PayPal solutions active at the same time: PayPal Express Checkout, plus any one of the All-In-One solutions. If you change payment solutions, the one used previously is automatically disabled.

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.

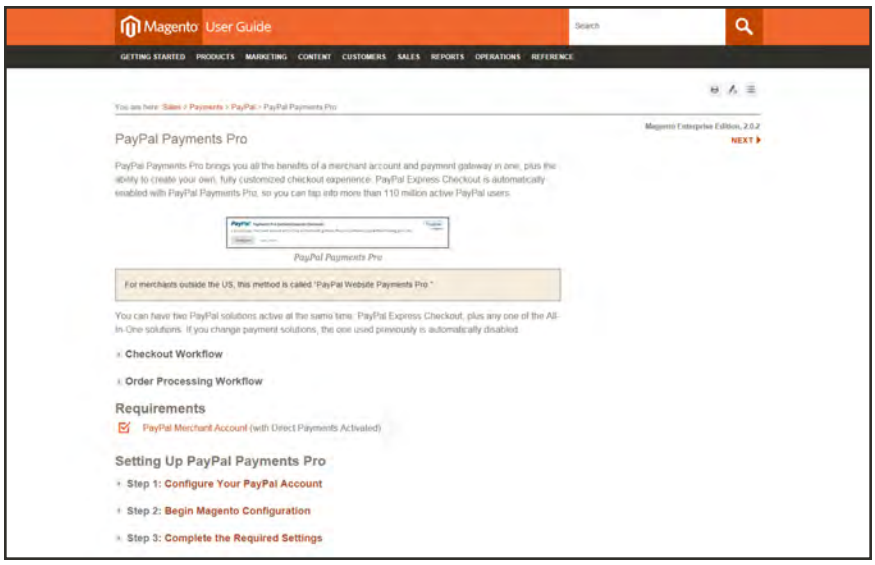
4. **Returns.** If for any reason the customer returns the purchased products and claims a refund, as with order amount capturing and invoice creation, you can create an online refund either from the Admin or from your PayPal merchant account.

Requirements

PayPal Merchant Account (with Direct Payments Activated)

Setting Up PayPal Payments Pro

For step-by-step configuration instructions, see PayPal Payments Pro in the Magento Enterprise Edition 2.0 online user guide.



Setting Up PayPal Payment Pro

PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment both by credit card and PayPal by simply adding a checkout button to your store.

PayPal Payments Standard

For merchants outside the US, this method is called “PayPal Website Payments Standard.”

With PayPal Payments Standard, you can swipe credit cards on mobile devices. There is no monthly fee, and you can get paid on eBay. Supported credit cards include Visa, MasterCard, Discover, and American Express. In addition, customers can pay directly from their personal PayPal accounts. PayPal Payments Standard is available in all countries on the PayPal worldwide reference list.

Checkout Workflow

For customers, PayPal Payments Standard is a one-step process if the credit card information the their personal PayPal accounts is up to date.

1. **Customer Places Order.** The customer taps the “Pay Now” button to complete the purchase.

2. **PayPal Processes the Transaction.** The customer is redirected to the PayPal site to complete the transaction.

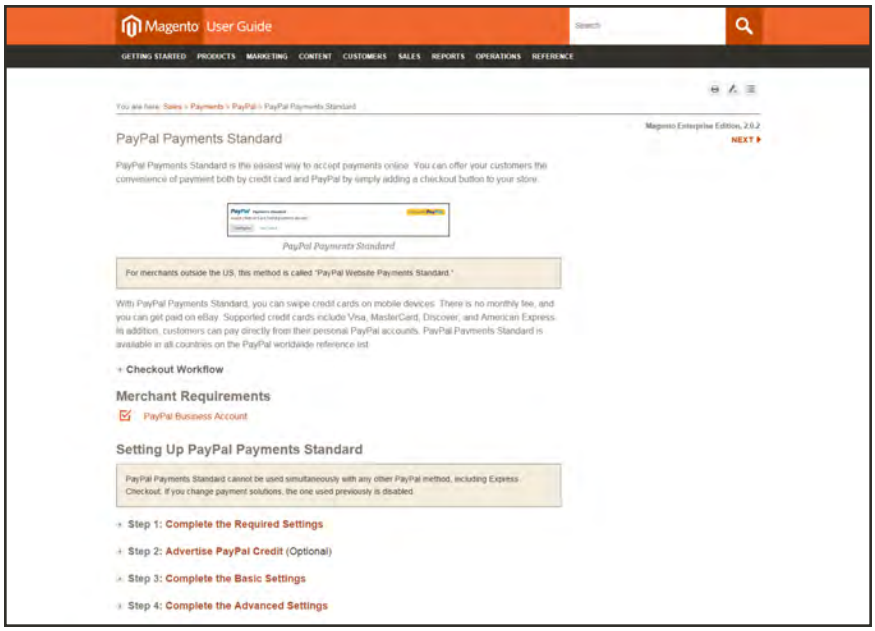
Merchant Requirements

PayPal Business Account

Setting Up PayPal Payments Standard

> PayPal Payments Standard cannot be used simultaneously with any other PayPal method, including Express Checkout. If you change payment solutions, the one used previously is disabled.

For step-by-step configuration instructions, see PayPal Payments Standard in the online user guide.

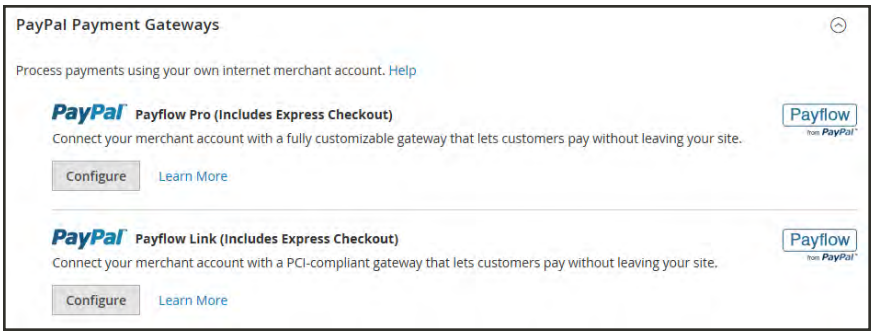


Setting Up PayPal Payments Standard

PayPal Payment Gateways

PayPal offers a choice of two payment gateway solutions for your business. You can have PayPal host your checkout on its secure payment site, or you can take control of the entire payment experience with a completely customizable solution.

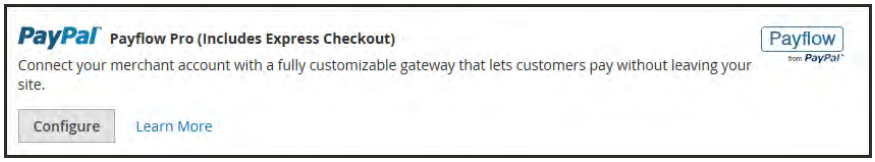
- PayPal Payflow Pro
- PayPal Payflow Link



PayPal Payment Gateways

PayPal Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is available for customers of the United States, Canada, Australia, and New Zealand. Unlike other PayPal payment methods, merchants are charged a fixed monthly fee, plus a fixed fee for each transaction, regardless of their number.



Configure

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 n the configuration, either a sales order or a sales order and an invoice is created.

Online Order Processing Workflow

1. **Admin 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.

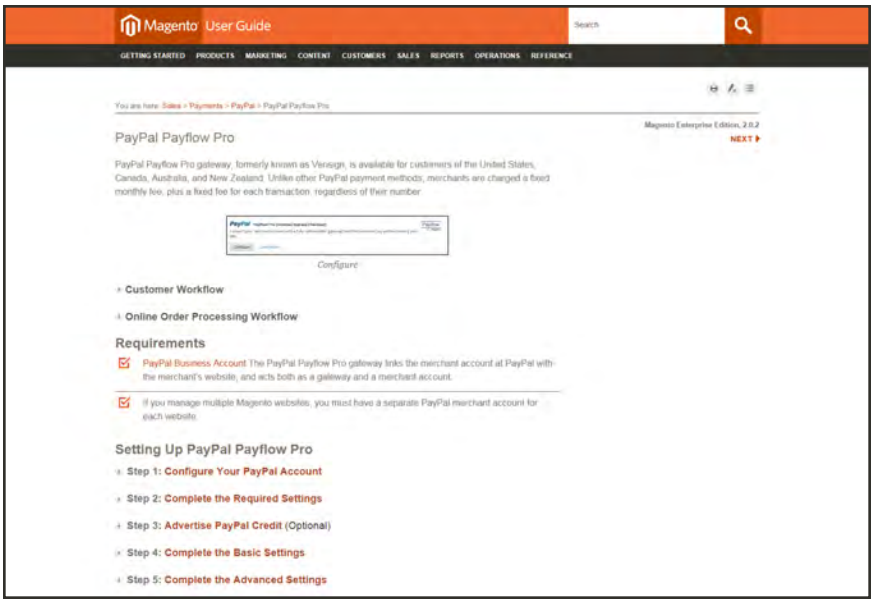
Partial invoices and partial refunds are not supported by PayPal Payflow Pro.

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.

Setting Up PayPal Payflow Pro

For step-by-step configuration instructions, see PayPal Payflow Pro in the Magento Enterprise Edition 2.0online user guide.



PayPal Payflow Pro

PayPal Payflow Link

PayPal PayFlow Link is available for merchants in the United States and Canada only. Customers are not required to have a personal PayPal account, and enter th eir 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.

Customer Workflow

1. **Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow link, and enters the credit card information.

   The customer is not required to have a personal PayPal account.

2. **Customer Chooses Pay Now.** The customer taps the Pay Now button to submit the order.

3. **Customer Enters Credit Card Info.** The customer enters the credit card information on a form that is hosted by PayPal/

   If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to “Canceled.”

4. **Customer Submits the Order.** The credit card information is submitted directly to PayPal, and is not retained anywhere on the Magento site.

Order Workflow

1. **PayPal Receives Request.** PayPal receives the request from the customer to Pay Now.

2. **PayPal Verifies the Payment Information.** PayPal verifies the credit card information, and assigns the appropriate status. If verified, the “Pending Payment” status is initially assigned to the order, until the transaction is settled. Options:

   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.

   If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to “Canceled.”

3. **Customer Is Redirected to Confirmation Page.** If the transaction completes successfully, the customer is redirected to the order confirmation page in your store.

   If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are managed by PayPal.

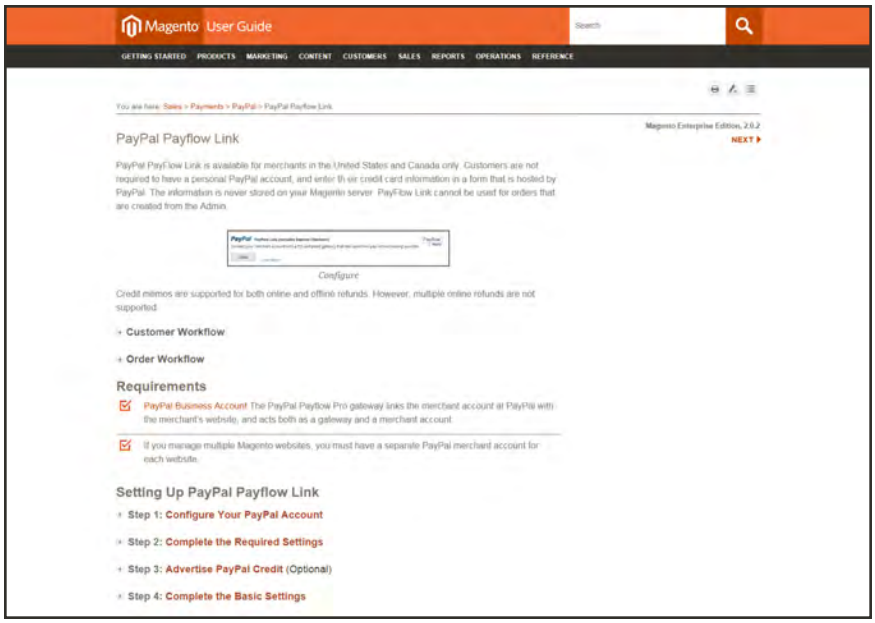
4. **Merchant Fulfills Order.** The merchant invoices, and ships the order as usual.

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.

Setting Up PayPal Payflow Link

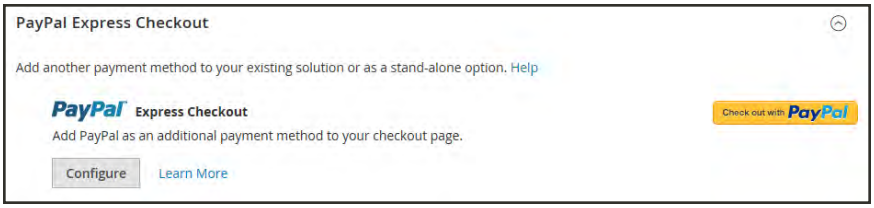
For step-by-step configuration instructions, see PayPal Payflow Link in the Magento Enterprise Edition 2.0online user guide.



PayPal Payflow Link

PayPal Express Checkout

PayPal Express Checkout helps boost sales by giving your customers the ability to pay by credit card or from the security of their personal PayPal accounts. During checkout, the customer is redirected to the secure PayPal site to complete the payment information. The customer is then returned to your store to complete the remainder of the checkout process. Choosing Express Checkout adds the familiar PayPal button to your store, which has been reported to increase sales.*



Customers with current PayPal accounts can make a purchase in a single step by clicking the "Check out with PayPal" button. Express Checkout can be used as a standalone, or in combination with one of PayPal's All-In-One solutions. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal.

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.

Requirements

- Merchant: Personal PayPal Account
- Customer: Personal PayPal Account

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: Complete the Basic Settings

Step 4: Complete the Advanced Settings

Step 1: Configure Your PayPal Account

1. Before you begin, you must configure your PayPal merchant account on the PayPal website.
   a. Log in to your PayPal Advanced account at manager.paypal.com.
   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.
   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 offer financing through PayPal to your customers, see PayPal Credit to learn more.

   You have now completed the Required PayPal Settings. At this point, you can either continue with the Basic and Advanced Settings, or click the **Save Config** button. You can return later fine-tune the configuration.

Step 2: Begin the Configuration

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. Expand the **PayPal Express Checkout** section. Then, tap **Configure**.

Step 3: Complete the Required Settings

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."

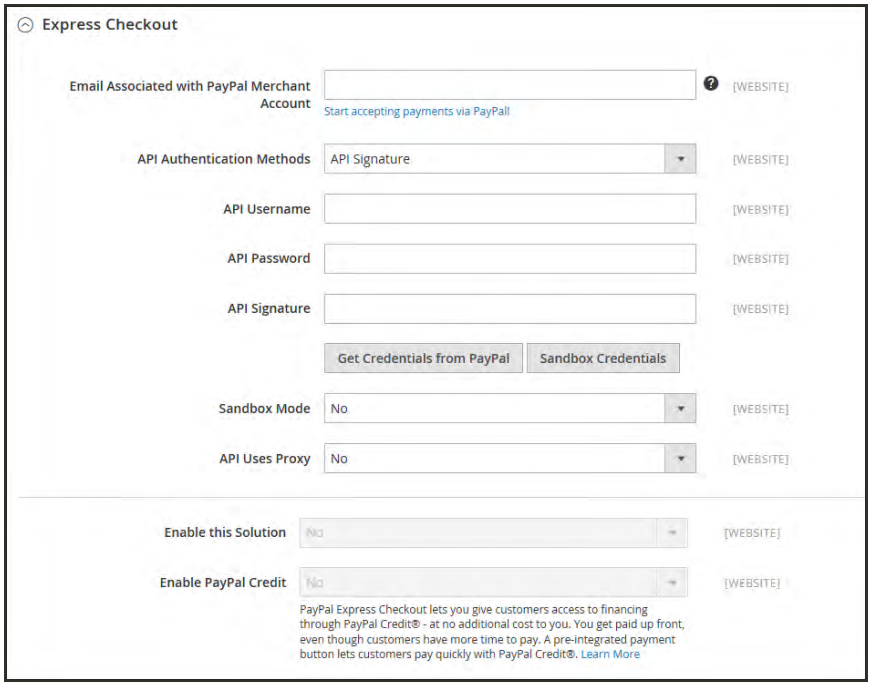
   If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

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.



Required Settings

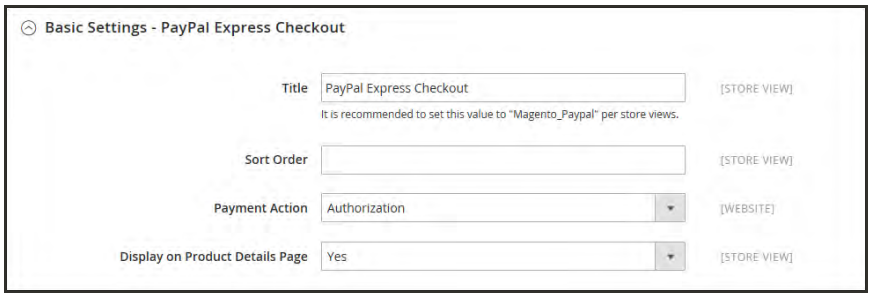
Step 4: Complete the Basic Settings

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 maximum of 29 days. After the funds are "ordered," the merchant can capture them at any time during the following 29 days. Capturing of the order amount can be done only from the Magento backend, 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)	Defines how long the primary authorization stays 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)	Defines 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 need to contact PayPal.
Number of Child Authorizations	Defines the maximum number of authorizations for one order; that is, the maximum number of the online partial invoices you can create for one 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 need to contact PayPal.



Basic Settings

Step 5: Complete the Advanced Settings

1. Expand the **Advanced Settings** section. Then, complete the following:

   a. Set **Display on Shopping Cart** to "Yes."

   b. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.

   c. Set **Debug Mode** to "Yes" to write communications with the payment system into the log file. The log file for PayPal Payments Advanced is payments_payflow_advanced.log.

   > In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

   d. To enable host authenticity verification, set **Enable SSL Verification** to "Yes."

   e. To display a full summary of the customer's order by line item from the PayPal site, set **Transfer Cart Line Items** to "Yes."

   To include up to ten shipping options in the summary, set **Transfer Shipping Options** to "Yes." (This option appears only if line items are set to transfer.)

   f. To determine the type of image used for the PayPal acceptance button, set **Shortcut Buttons Flavor** to one of the following:

Dynamic	(Recommended) Displays an image that can be dynamically changed from the PayPal server.
Static	Displays a specific image that cannot be dynamically changed.

g. To allow customers without PayPal accounts to make a purchases with this method, set **Enable PayPal Guest Checkout** to "Yes."

h. Set **Require Customer's Billing Address** to one of the following:

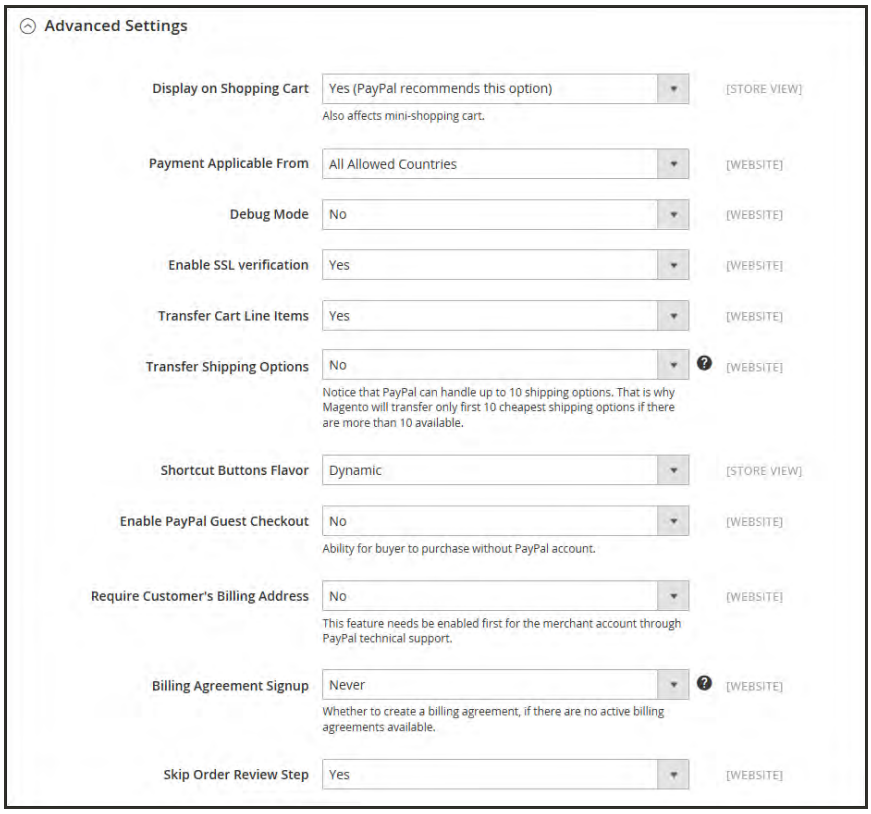
Yes	Requires the customer's billing address for all purchases.
No	Does not require the customer's billing address for any purchases.
For Virtual Quotes Only	Requires the customer's billing address for virtual quotes only.

i. To specify whether the customer can sign a billing agreement with your store in the PayPal payment system when there are no active billing agreements available in the customer account, set **Billing Agreement Signup** to one of the following:

Auto	The customer can either sign a billing agreement during the Express Checkout flow or use another method of payment.
Ask Customer	The customer can decide whether to sign a billing agreement during the Express Checkout flow.
Never	The customer cannot sign a billing agreement during the Express Checkout flow.

Merchants must ask PayPal Merchant Technical Support to enable billing agreements in their accounts. The Billing Agreement Signup parameter is enabled only after PayPal confirms that billing agreements are enabled for your merchant account.

j. To allow the customer to complete the transaction from the PayPal site without returning to your Magento store for Order Review, set **Skip Order Review Step** to "Yes."



Advanced Settings

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.

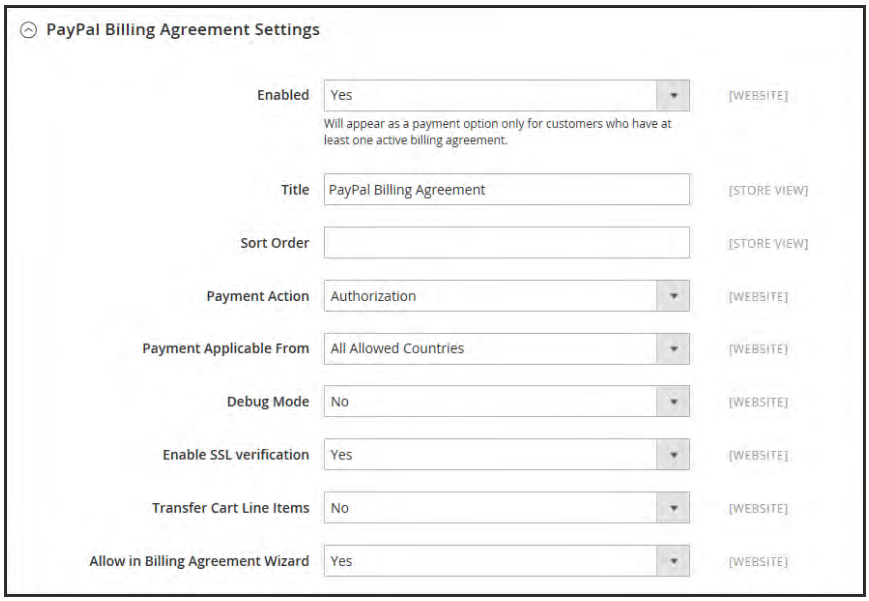
e. To record communications with the payment system in the log file, set **Debug Mode** to "Yes."

> 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."



Billing Agreement Settings

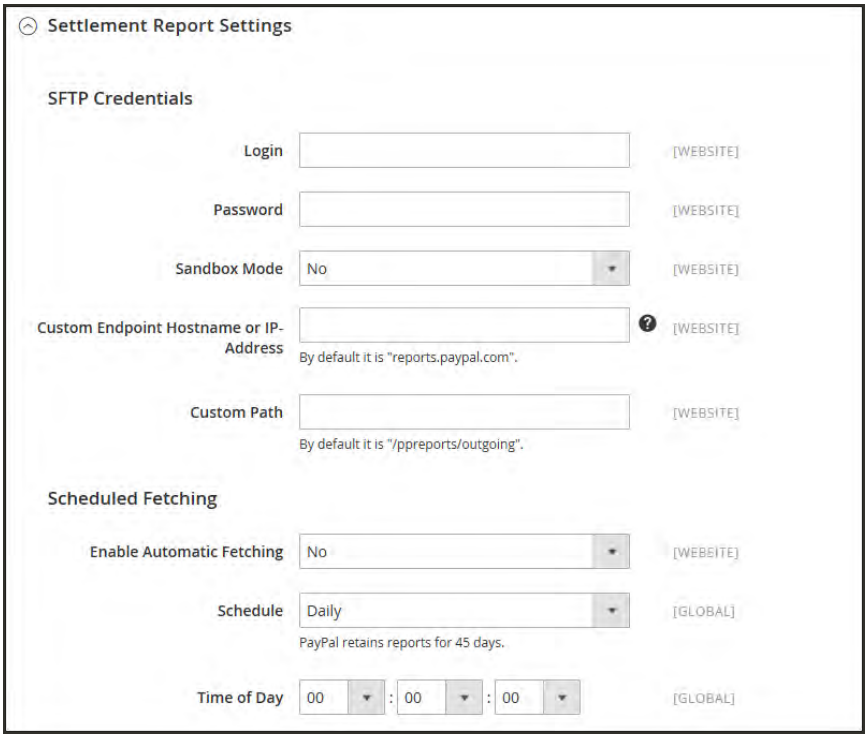
Settlement Report Settings

1. Click to expand the **Settlement Report Settings** section.
2. If you have signed up for PayPal's Secure FTP Server, enter the following SFTP login credentials:
   - Login
   - Password
3. To run test reports before "going live" with Express Checkout on your site, set **Sandbox Mode** to "Yes."
4. Enter the **Custom Endpoint Hostname or IP Address**. By default, the value is: reports.paypal.com
5. Enter the **Custom Path** where reports are saved. By default, the value is: /ppreports/outgoing
6. To generate reports according to a schedule, under Scheduled Fetching, make the following settings:
   a. Set **Enable Automatic Fetching** to "Yes."
   b. Set **Schedule** to one of the following:

- Daily
- Every 3 Days
- Every 7 Days
- Every 10 Days
- Every 14 Days
- Every 30 Days
- Every 40 Days

PayPal retains each report for forty-five days.

c. Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.



Settlement Report Settings

Frontend Experience Settings

The frontend experience settings give you the opportunity to choose which PayPal logos appear on your site, and to customize the appearance of your PayPal merchant pages.

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:

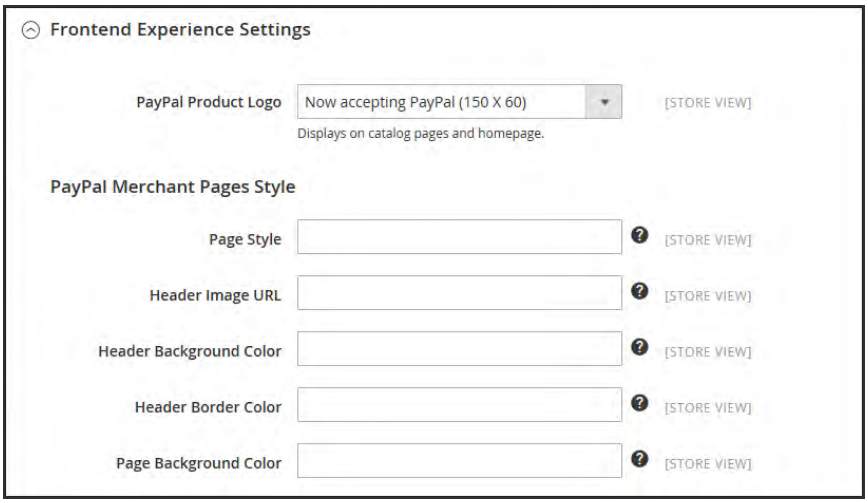
`paypal`	Uses the PayPal page style.
`primary`	Uses the page style that you identified as the "primary" style in your account profile.
`your_custom_value`	Uses a custom payment page style, which is specified in your account profile.

   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

3. 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. A list of the billing agreements established with customers can be viewed in the Billing Agreements grid.

Billing Agreement Workflow

1. **Customer signs up for a billing agreement.** From your store, customers can sign up for a billing agreement from their customer accounts, or while checking out with PayPal Express Checkout. 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.

   a. **Customer pays with billing agreement.**During checkout, the customer chooses the billing agreement as the payment method. . When the customer places the order, the billing agreement reference ID and sales order payment details are transferred to PayPal.

   b. **Through PayPal Express Checkout.**Customers who pay for a purchase with PayPal Express Checkout can mark a checkbox to create a billing agreement. The billing agreement is not used for the current order, but becomes available as a payment method the next time the customer places an order. The billing agreement reference ID is sent to the customer and to the store

      After a billing agreement is signed, the customer returns to Magento checkout, and places the order. PayPal processes the transaction using PayPal Express Checkout, and a sales order is created in Magento. .

   c. **When order is created from Admin.**On a customer’s request, the store administrator can create a sales order using the customer’s billing agreement.

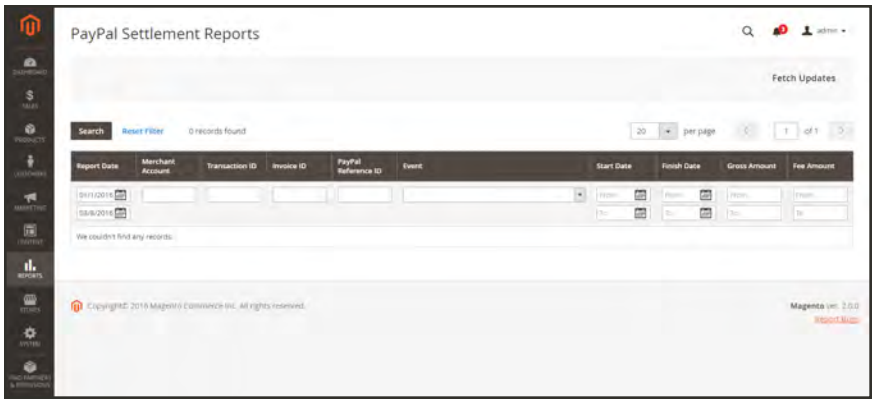
2. **PayPal Verifies and Records Agreement.** When a billing agreement is created, it is submitted to the PayPal payment system and recorded in the customer account, along with reference information. If the payment is authorized, an order is created in Magento.

PayPal Settlement Reports

The PayPal Settlement report provides the store administrator with the information about each transaction that affects the settlement of funds.

> Before generating settlement reports, the store administrator must request PayPal Merchant Technical Services to create an SFTP user account, enable settlement reports generation, and enable SFTP in their PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports during the following twenty-four hours. The list of available settlement reports can be viewed from the Admin.



To view settlement reports:

1. On the Admin sidebar, tap **Reports**. Then under **Sales**, choose select **PayPal Settlement.**
2. For the most recent updates, tap **Fetch Updates** in the upper-right corner.

   The system connects to the PayPal SFTP server to fetch the reports. When the process is complete, a message appears with the number of reports fetched. The report includes the following information for each transaction:

Field Descriptions

FIELD	DESCRIPTION	
PayPal Reference ID Type	One of the following reference codes: Order ID Transaction ID Subscription ID	
Preapproved Payment ID	Options include:	
	Custom	The text entered by the merchant on the transaction in PayPal.
	Transaction Debit or Credit	The direction of money movement of gross amount.
	Fee Debit or Credit	The direction of money movement for fee.

PayPal Fraud Management Filter

PayPal fraud management filters make it easier to detect and respond to fraudulent transactions, and can be configured to flag, hold for review, or deny riskier payments. Magento order status values changed according to the fraud filter settings.

Filter Actions

ACTION	DESCRIPTION
Review	If you set the filter action to “Review,” the suspected order receives the status ”Payment Review” when the order is placed. You can review the order and approve, or cancel the payment in the Admin, or on the PayPal side. When you click the Accept Payment or the Deny Payment buttons, no new transactions for the order are created. 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.
Deny	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.
Flag	If you set the filter action to “Flag”, the suspected order gets the status ”Processing” when it is placed. The corresponding transaction is marked with a “flag” in the list of the merchant account transactions.

PayPal Solutions by Country

PayPal Payment Solutions

COUNTRY	PAYPAL PAYMENT SOLUTION
Australia	PayPal Website Payments Standard PayPal Payflow Pro PayPal Website Payments Pro Hosted Solution PayPal Express Checkout
Canada	PayPal Website Payments Standard PayPal Website Payments Pro PayPal Payflow Pro PayPal Payflow Link (includes Express Checkout) PayPal Express Checkout
France	PayPal Integral Evolution PayPal Website Payments Standard PayPal Express Checkout
Germany	PayPal Express Checkout
Hong Kong SAR China	PayPal Website Payments Pro Hosted Solution PayPal Website Payments Standard PayPal Express Checkout
Italy	PayPal Pro PayPal Payments Standard PayPal Express Checkout
Japan	PayPal Website Payments Plus PayPal Website Payments Standard PayPal Express Checkout
New Zealand	PayPal Payflow Pro PayPal Website Payments Standard

PayPal Payment Solutions (cont.)

COUNTRY	PAYPAL PAYMENT SOLUTION
	PayPal Express Checkout
Spain	PayPal Pasarela Integral PayPal Website Payments Standard PayPal Express Checkout
United Kingdom	PayPal Payments Pro Hosted Solution (includes Express Checkout) PayPal Payments Standard PayPal Express Checkout
United States	PayPal Payments Advanced (Includes Express Checkout) PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard+ PayPal Payflow Pro (Includes Express Checkout) PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout

OTHER COUNTRIES
PayPal Express Checkout and PayPal Website Payments Standard are available in the following countries:
Argentina, Austria, Belgium, Brazil, Bulgaria, Chile, Costa Rica, Cyprus, Czech Republic, Denmark. Dominican Republlic, Ecuador. Estonia, Finland. French Guiana. Gibraltar. Greece. Guadeloupe, Hungary, Iceland. India. Indonesia. Ireland. Israel, Jamaica, Latvia. Leichtenstein. 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

Notes

CHAPTER 66:

Other Payment Solutions

Magento Enterprise Edition 2.0 supports a wide range of third-party payment gateways and 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.

Testing Credentials

When testing the configuration of a payment gateway, use the following credentials for test transactions.

Visa	4111111111111111
MasterCard:	5555555555554444
American Express:	378282246310005
Expiration Date:	Any future date
CVV/CVC:	123 or 000

Authorize.Net Direct Post

Authorize.Net handles all steps in the transaction process— such as payment data collection, data submission, and response to the customer—while the customer remains in your store. Authorize.Net Direct Post can be used with orders created from the Admin as well as from the store.

Customer Workflow

1. **Customer chooses payment method.** During checkout, the customer chooses Authorize.Net Direct Post as the payment method.

2. **Customer submits the order.** The customer enters the credit card information, reviews the order, and taps the Place Order button.

3. **Authorize.Net completes the transaction.** Authorize.Net validates the card information, and processes the transaction.
   - If successful, the customer is redirected to the order confirmation page.
   - If the transaction fails, an error message appears, and the customer can try a different card, or choose a different payment method.

Step 1: Enable Direct Post

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose , select **Configuration**. Then in the panel on the left under **Sales**, choose **Payment Methods**.
2. Expand the **Authorize.Net Direct Post** section. Then, do the following:
   a. Set **Enabled** to "Yes."
   b. Set **Payment Action** to one of the following:

Authorize Only	Funds on the customer's card are authorized by Authorize.Net, and an order is created in your store's Admin. You can later create an invoice and capture the funds.
Authorize and Capture	Funds on the customer's card are authorized and captured by Authorize.Net, and an order and invoice are created in your store's Admin.

   c. Enter a **Title** to identify Authorize.Net Direct Post as a payment option during checkout.

Step 2: Enter Your Credentials

1. Enter the following credentials from your Authorize.Net account:
   - API Login ID
   - Transaction Key
2. In the Merchant MD5 field, enter the hash value from your Authorize.Net merchant Account. The value is located on the Authorize.Net website at **Account > Settings > Security Settings > MD5-Hash**.
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."
5. Enter the **Gateway URL** that establishes the connect to the Authorize.Net server. The default value is:

   ```
   https://secure.authorize.net/gateway/transact.dll
   ```

   If you have received a temporary URL for test transactions, don't forget to restore the original URL when you are ready to process live transactions.

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."

c. Set **Payment from Applicable Countries** to one fo the following:

(missing or bad snippet)

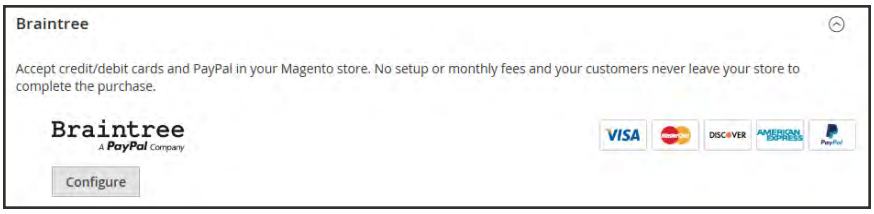
d. Enter the **Minimum Order Total** and **Maximum Order Total** for Directd Post transactions. To qualify, the order total must exactly match the minimum or maximum threshold, or fall somewhere in between.

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**.

Braintree

Braintree offers a fully customizable checkout experience with fraud detection and PayPal integration. Braintree reduces the PCI compliance burden for merchants because the transaction takes place on the Braintree systerm.



Configure

Process Overview:

Step 1: Get 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 Braintree Credentials

Visit Braintree Payments and sign up for an account.

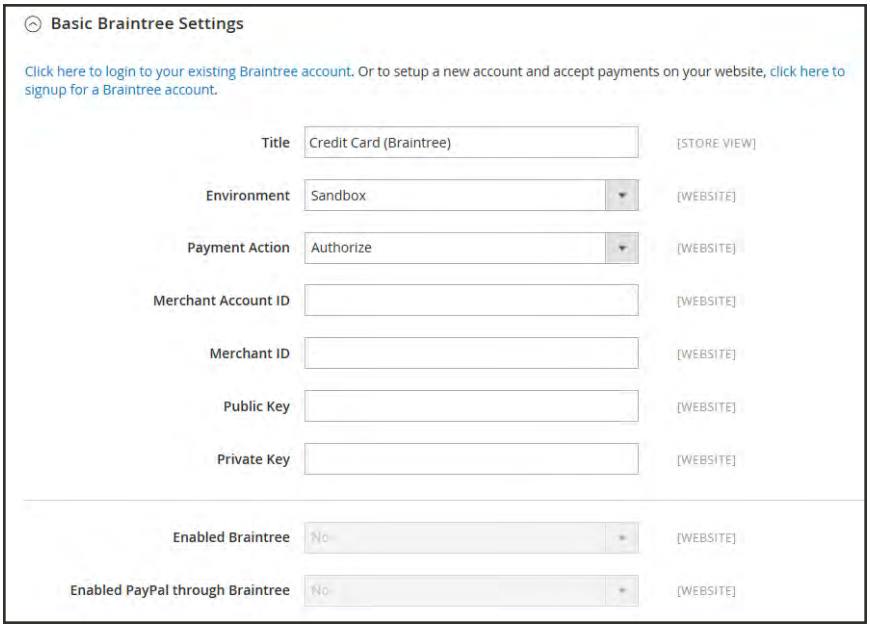
Step 2: Complete the Basic Settings

1. Enter a **Title** to identify Braintree as a payment option during checkout.
2. Set the current operating **Environment** for Braintree transactions to one of the following:
   - Sandbox
   - Production

   When you are ready to go live with Braintree, set **Environment** to “Production.”
3. 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.

4. Enter the following credentials from your Braintree account:
   - Merchant Account ID
   - Public Key
   - Private Key
5. Set **Enable this Solution** to "Yes."
6. To include PayPal as a payment option with Braintree, set **Enable PayPal through Braintree** to "Yes."



Basic Settings

Step 3: Complete the Advanced Settings

1. If you want the system to save a log file of interactions between your store and Braintree, set **Debug** to "Yes."
2. Set **Capture action** to one of the following:

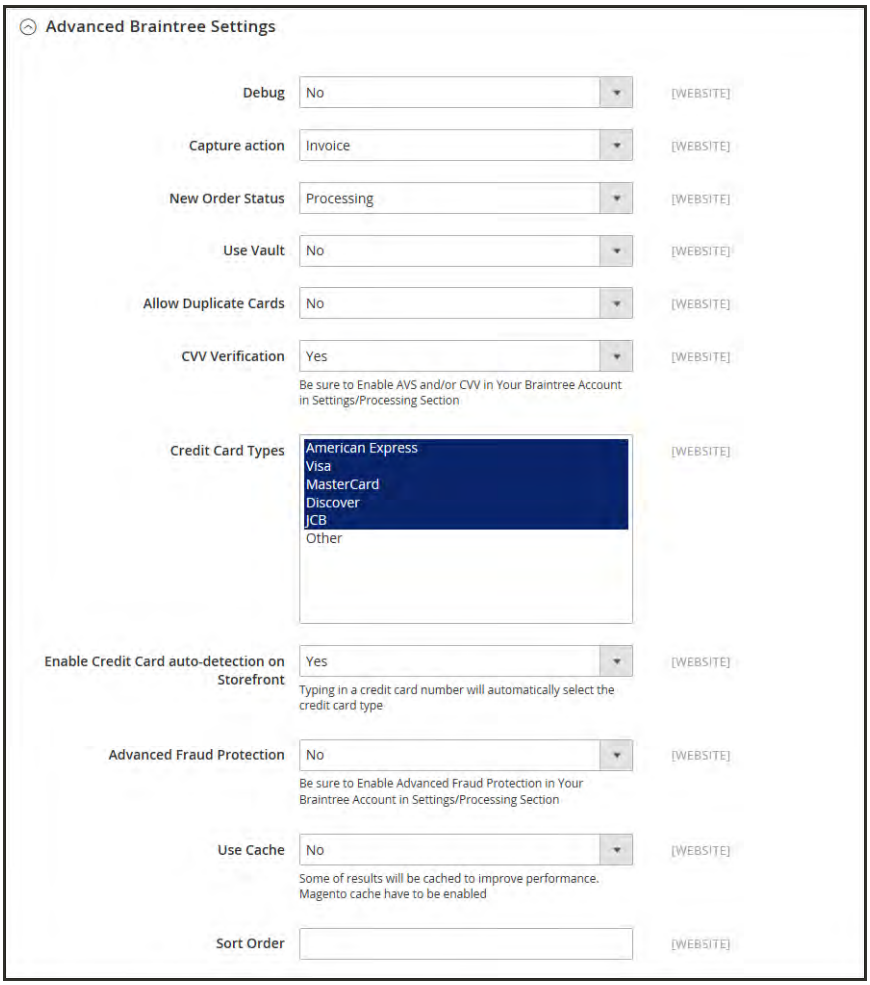
Invoice	When payment is captured, an invoice is created.
Shipment	When payment is captured, both an invoice and shipment record are created. The status of the order changes to "Authorized."

3. Set **New Order Status** to one of the following:
   - Processing
   - Suspected Fraud
4. If you want to store customer credit card information in the Braintree vault, set **Use Vault** to "Yes."
5. By default, **Allow Duplicate Cards** is set to "No." You can change this setting at your discretion.
6. To require customers to provide the 3-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. To configure credit card payments, do the following:
   a. 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.
   b. If you want the system to detect the credit card type when the customer enters the number, set **Enable Credit Card auto-detection on Storefront** to "Yes."
   c. To apply Braintree fraud protection to transactions, set **Advanced Fraud Protection** to "Yes."

      Make sure that Advanced Fraud Protection is enabled in the Settings/Protection section of your account.
8. To improve performance by caching some results, set **Use Cache** to "Yes."

   The Magento cache must be is enabled to use the cache with Braintree.
9. In the **Sort Order** field, enter a number to determine the sequence in which Braintree appears when listed with other payment methods during checkout.

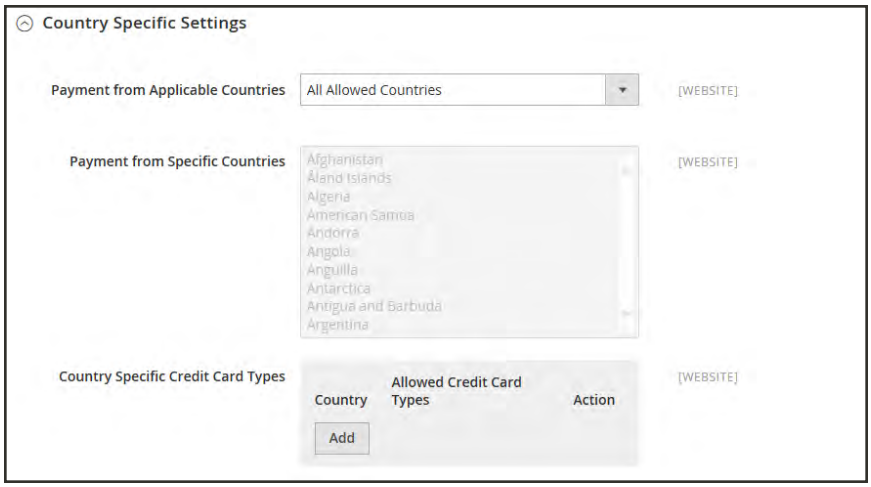


Advanced Settings

Step 4: Complete the Country Specific Settings

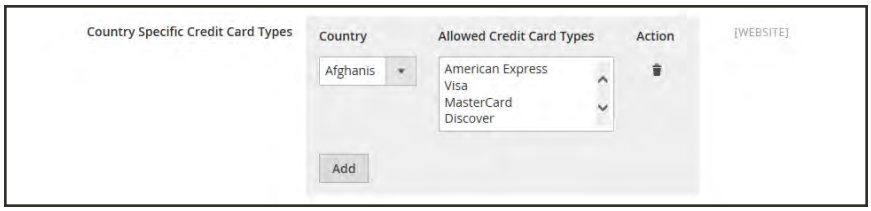
1. Set **Payment from Applicable Countries** to one of the following:
   - All Allowed Countries
   - Specific Countries

   For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.



Country-Specific Settings

2. To set up **Country Specific Credit Card Types**, do the following:
   a. Tap **Add**.
   b. Set the **Country**, and choose each **Allowed Credit Card Type**.
   c. Repeat to identify the credit cards that are accepted from each country.



Country-Specific Credit Card

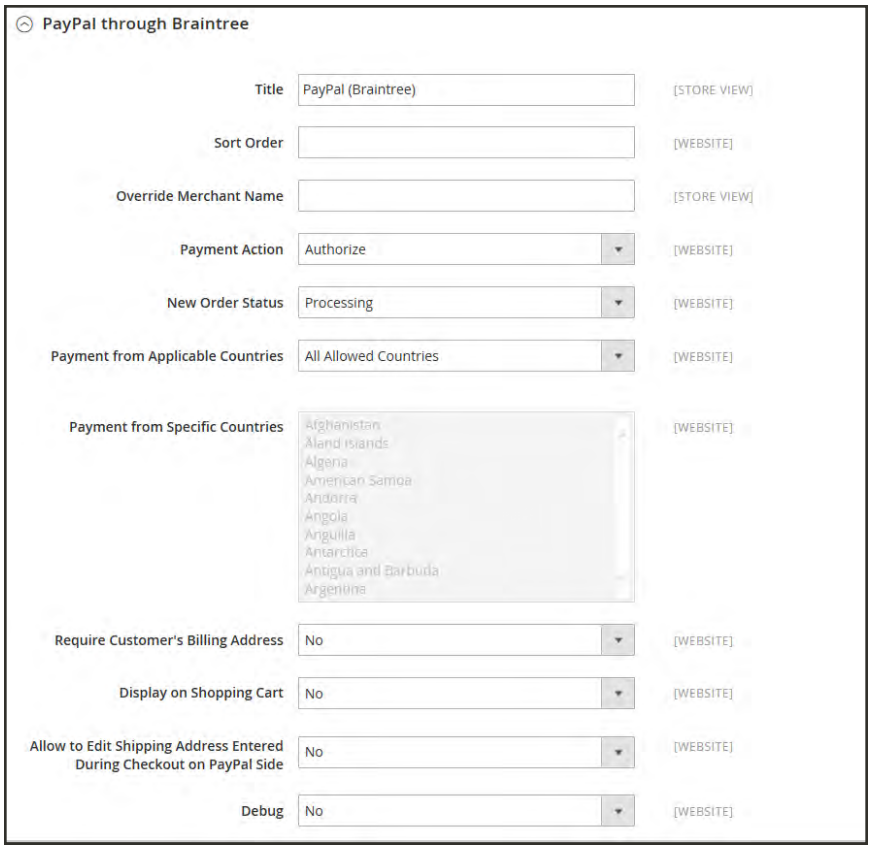
Step 5: Complete the PayPal through Braintree Settings

1. Enter a **Title** to identify Braintree's payment by PayPal option during checkout.
2. 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.
3. 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.
4. 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.

5. Set **New Order Status** to one of the following order status settings:
   - Processing
   - Suspected Fraud
6. 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.
7. If you want require that customers to provide a billing address, set **Require Customer's Billing Address** to "Yes."
8. If you want the PayPal button to appear in the mini shopping cart and on the shopping cart page, set **Display on Shopping Cart** to "Yes."
9. 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."
10. If you want the system to save a log file of interactions between your store and PayPal through Braintree, set **Debug** to "Yes."



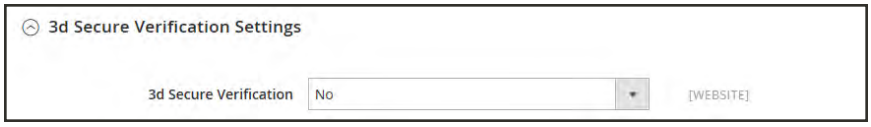
PayPal through Braintree Settings

Step 6: Complete the 3D Verification Settings

1. If you want to add a verification step for customers using credit cards that are enrolled in a verification program such as "Verified by VISA," set **3d Secure Verification** to "Yes."

   During the process, the transaction amount that is submitted for verification is checked against the amount that is sent for authorization,

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



3D Verification Settings

CyberSource

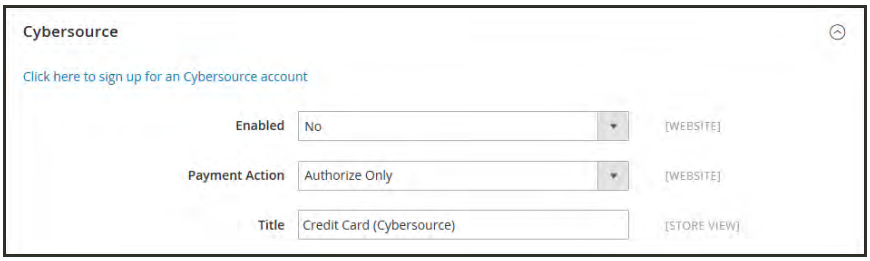
CyberSource was one of the pioneers in the early online payment industry, and later acquired Authorize.Net. Today, Cybersoure is a wholly-owned subsidiary of Visa Inc. Over 400,000 businesses worldwide use CyberSource to process online payments, streamline fraud management, and to simplify payment security. The company is based in Foster City, California, and has offices throughout Asia, Europe, Latin America, the MIddle East, Africa, and the United States.

Step 1: Get Your CyberSource Credentials

Sign up for a CyberSource merchant account, and get your credentials.

Step 2: Enable CyberSource

1. Set **Enabled** to "Yes."
2. Accept the **Default Payment** action of "Authorized Only," which approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
3. Enter a **Title** to identify CyberSource during checkout.

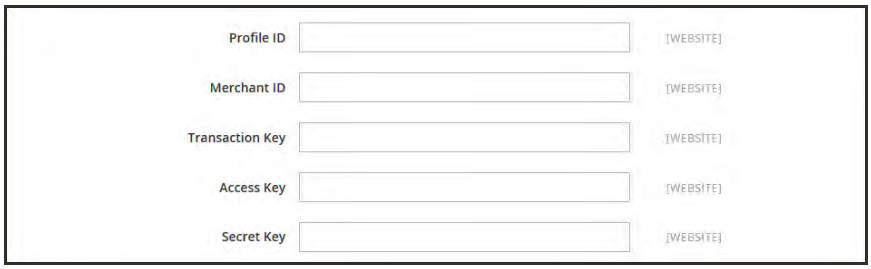


Enable CyberSource

Step 3: Enter Your CyberSource Credentials

Enter the following credentials from your CyberSource account:

- Profile ID
- Merchant ID
- Transaction Key
- Access Key
- Secret Key

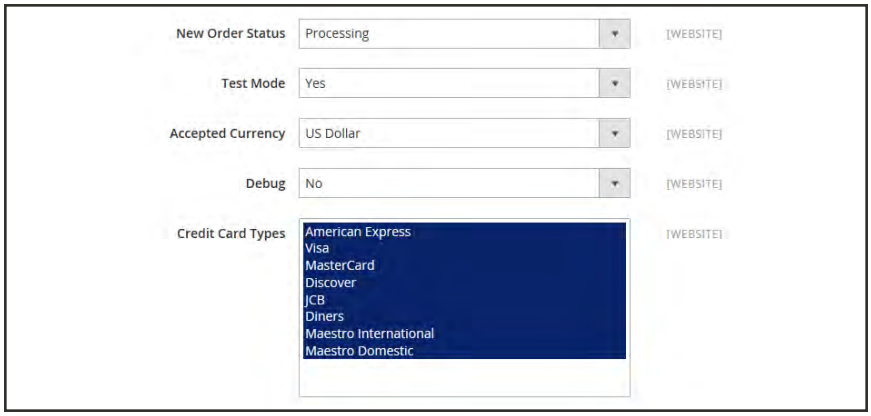


Your CyberSource Credentials

Step 4: Complete the Payment Information

1. Set **New Order Status** to one of the following order status settings:
   - Processing
   - Suspected Fraud
2. To run CyberSource in a test environment before going live, set **Test Mode** to "Yes."

   When you are ready to go live with CyberSource, set Test Mode to "No."
3. If you want the system to save a log file of interactions between your store and CyberSource, set **Debug** to "Yes."
4. Set **Credit Card Types** to each card that you accept as payment. To choose multiple credit cards, hold down the Ctrl key and click each option.

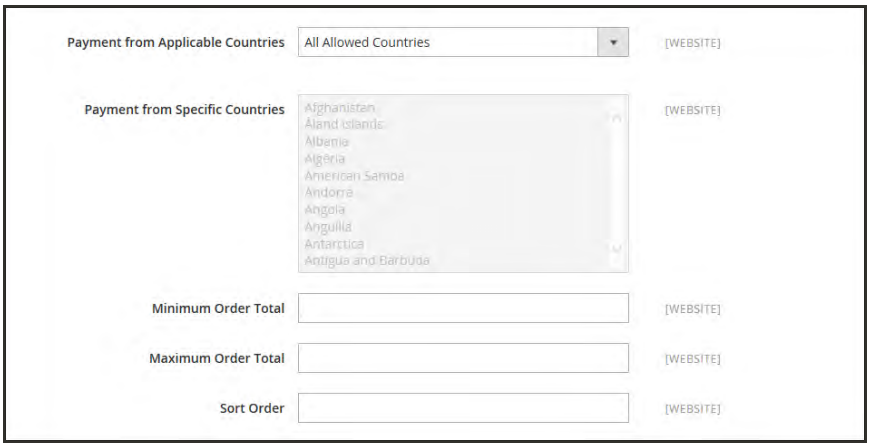


Credit Card Types

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**.



Remaining Information

eWAY

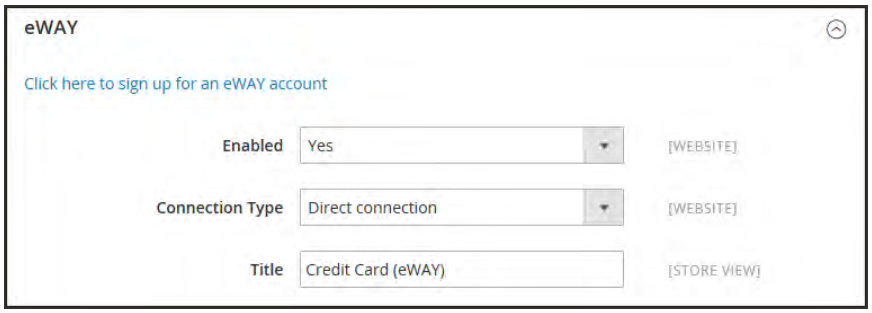
eWAY is based in Australia, and provides secure payment processing services to merchants throughout Australia, New Zealand, the United Kingdom, Singapore, Malaysia, and Hong Kong. Their latest Rapid 3.1 API enables real-time fraud protection.

Step 1: Get Your eWAY Credentials

Sign up for an eWAY merchant account, and get your credentials.

Step 2: Enable eWAY

1. Log in to the Admin of your store. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configure**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand the **eWAY** section. Then, do the following:



Enable eWAY

   a. Set **Enabled** to "Yes."
   b. Set **Connection Type** to one of the following:

Direct connection	Completes the transaction without leaving your website.
Responsive shared page	Redirects to a page for your store that is hosted on the eWAY server to complete the transaction.

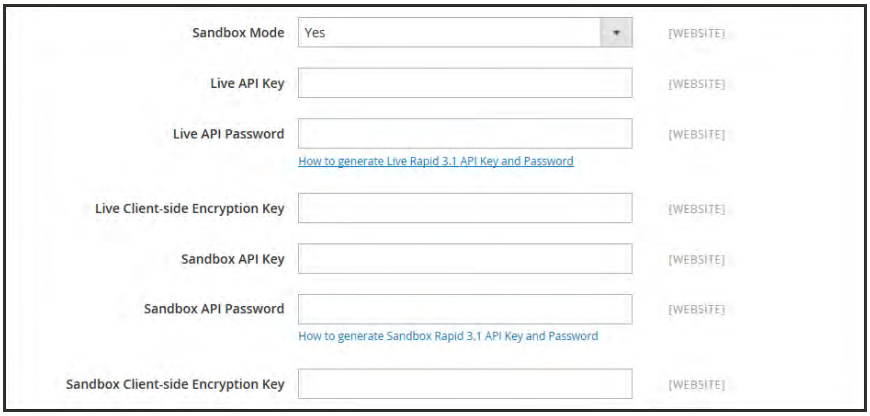
   c. Enter a **Title** to identify eWAY as a payment option during checkout.

Step 3: Enter Your eWAY Credentials

1. To run test transactions in a test environment, set **Sandbox Mode** to "Yes." To learn more, see: Sandbox/Testing on the eWAY website.

   When you are ready to go live with eWAY, set **Sandbox Mode** to "No."

2. Follow the instructions on the eWAY website to set up your Live API key and password. Then, enter the following:
   - Live API Key
   - Live API Password
   - Live Client-side Encryption Key
3. Follow the instructions on the eWAY website to set up your sandbox credentials. Then, enter the following:
   - Sandbox API Key
   - Sandbox API Password
   - Sandbox Client-side Encryption Key



eWAY Credentials

Step 4: Configure Payments

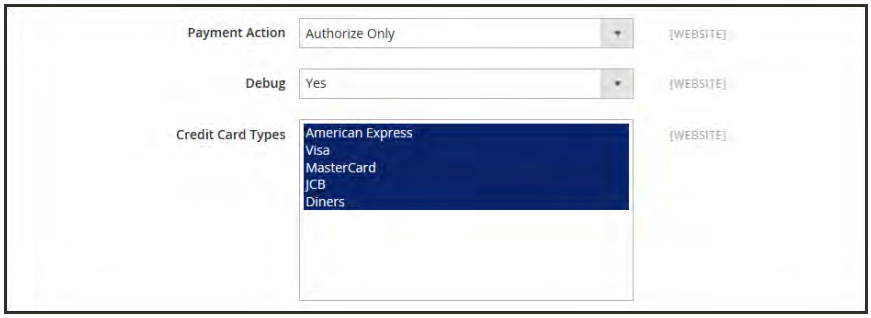
1. Set **Payment Action** to one of the following

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.

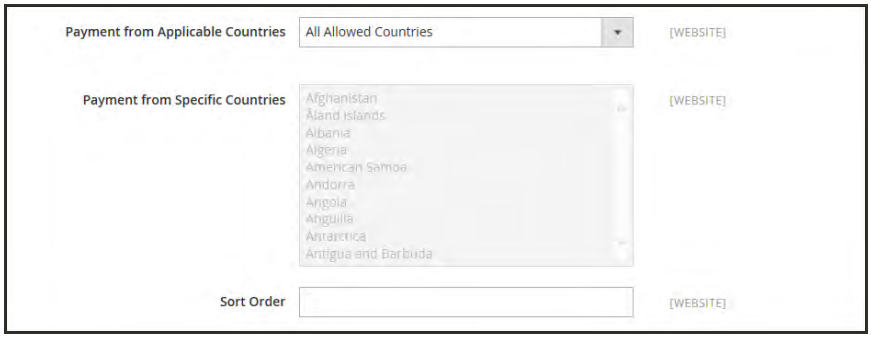


Configure Payments

4. Set **Payment from Applicable Countries** to one of the following:

   - All Allowed Countries
   - Specific Countries

   For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.



Configure Countries

5. In the **Sort Order** field, enter a number to determine the order in which eWAY appears when listed with other payment methods during checkout.

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

Worldpay

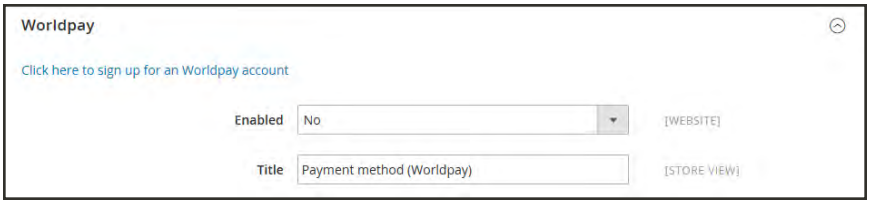
London-based Worldpay has twenty-five offices in eleven countries around the world. The company is a global leader in card payments, multi-currency processing, and provides local in-store and mobile payment acceptance solutions for companies large and small.

Step 1: Get Your Worldpay Credentials

Sign up for a Worldpay online merchant account.

Step 2: Enable Worldpay

1. Set **Enabled** to "Yes."
2. Enter a **Title** to identify Worldpay as a payment option during checkout.



Enable Worldpay

Step 3: Enter Your Worldpay Credentials

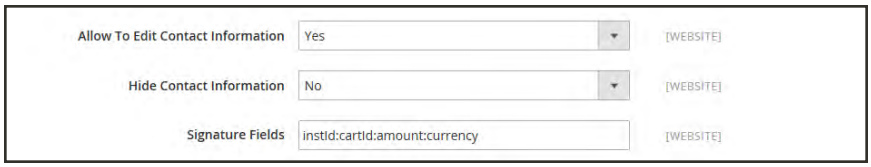
Enter the following credentials from your Worldpay account:

- Installation ID
- Payment Response Password
- Remote Admin Installation ID
- Remote Admin Authorization Password
- MDS Secret for Transactions

Worldpay Credentials

Step 4: Configure Contact Information

1. If you want customers to be able to edit their contact information, set **Allow to Edit Contact Information** to "Yes."
2. If you don't want to show customers their contact information, set **Hide Contact Information** to "Yes."
3. Accept the default **Signature Fields** value.

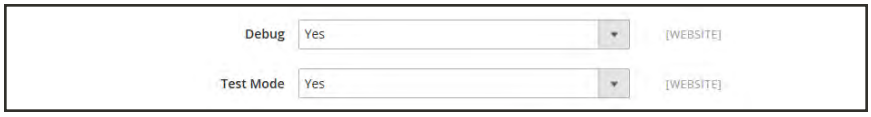


Contact Information

Step 5: Configure Test Mode

1. If you want the system to save a log file of interactions between your store and Worldpay, set **Debug** to "Yes."
2. To run Worldpay in a test environment before going live, set **Test Mode** to "Yes."

   When you are ready to go live with Worldpay, set **Test Mode** to "No."



Test Mode

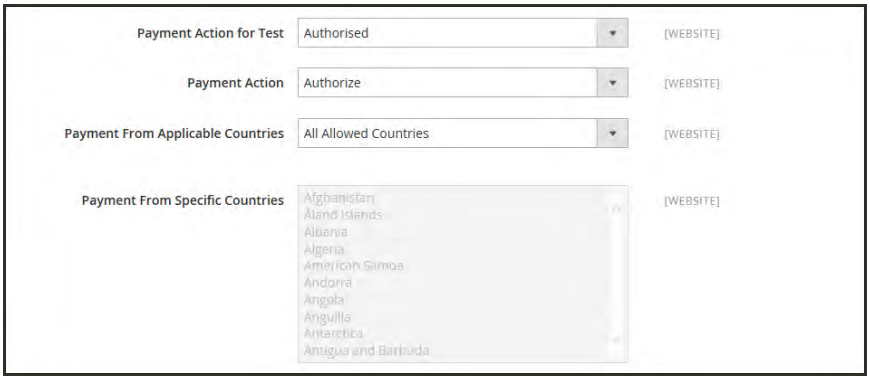
Step 6: Configure Payments

1. To determine the payment action used for test transactions, set **Payment Action for Test** to one of the following:
   - Authorised
   - Error
   - Captured
2. To determine the payment action used for live transactions, set **Payment Action** to one of the following:

Authorize Only	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

3. Set **Payment from Applicable Countries** to one of the following:
   - All Allowed Countries
   - Specific Countries

   For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.



Configure Payments

Step 7: Configure Fraud Prevention Settings

Set both **Order Status to Suspected Fraud for CVV** and **Order Status to Suspected Fraud tor 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.

Sort Order

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

Shipping

Studies show that stores that offer a choice of several shipping methods have higher conversion rates than those that use a single method for all shipments. In this section, you will learn how to set up a variety of shipping methods and carriers, and print shipping labels.

Contents

CHAPTER 67:

Shipping Settings

The Shipping Settings establish the point of origin for all shipments made from your store or warehouse, and manages orders that are shipped to multiple addresses. Topics include:

- Point of Origin
- Multiaddress Shipping

Point of Origin

The point of origin is used to calculate the charge for shipments made from your store or warehouse, and determines the tax rate for products sold.

Origin

To establish the point of origin:

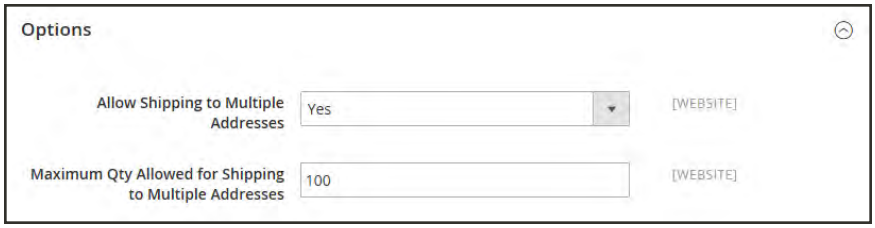
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand the **Origin** section, and complete the following:
   - Country
   - Region / State
   - ZIP / Postal Code
   - City
   - Street Address (and line 2, if needed)
4. When complete, tap **Save Config**.

Shipping to 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

Notes

CHAPTER 68:

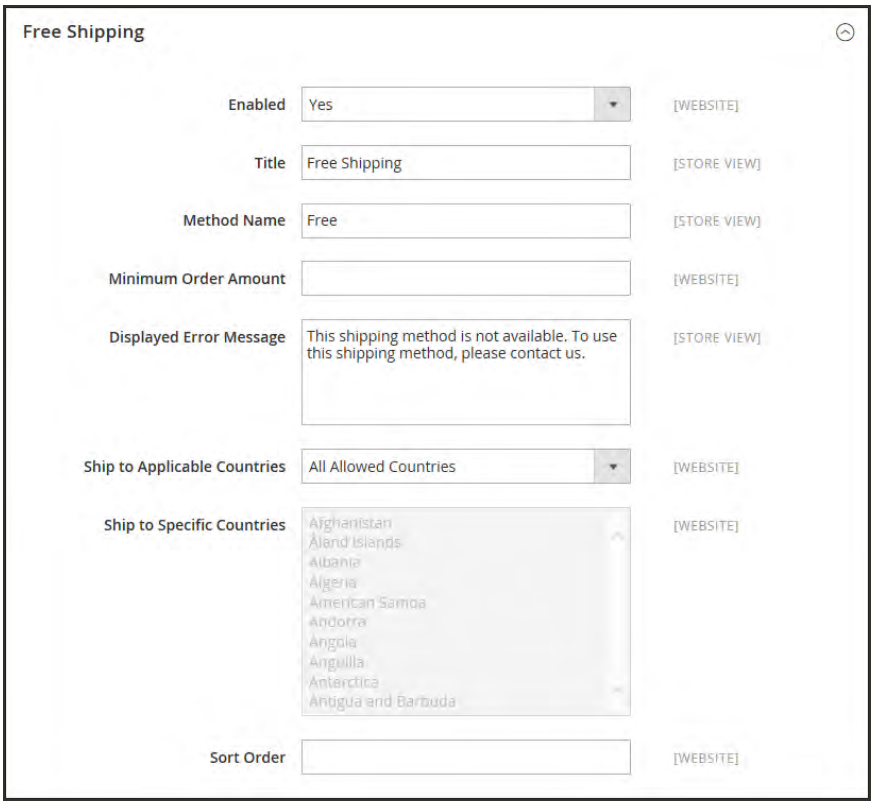
Basic Shipping Methods

Magento Enterprise Edition 2.0 supports a wide range of shipping methods and carriers. In this chapter you will learn how to set up and use your store's basic shipping methods.

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 shopping 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 shopping cart rule.

> Check your shipping carrier configuration for any additional settings that may be required for free shipping.



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**.

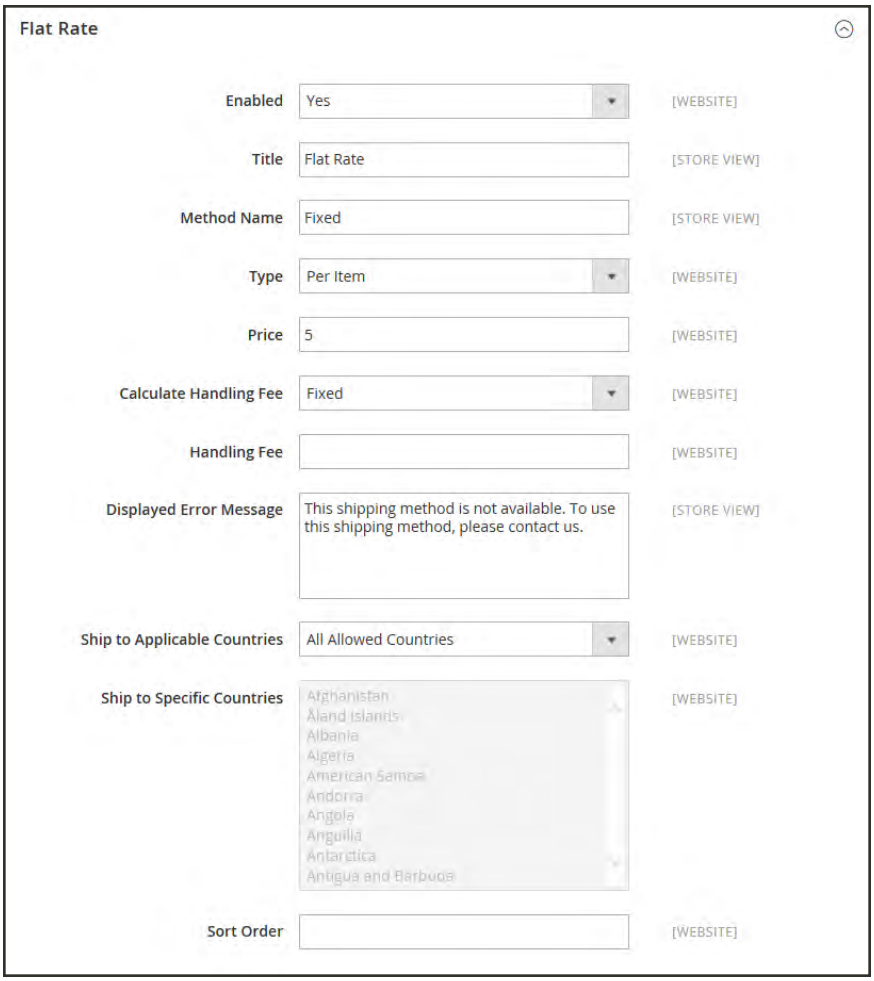
Step 2: Enable Free Shipping in the Carrier Configuration

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 Shipping

Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple shipping solution, especially when used with the flat-rate packaging that is available from some carriers.



Flat Rate

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."
   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**.

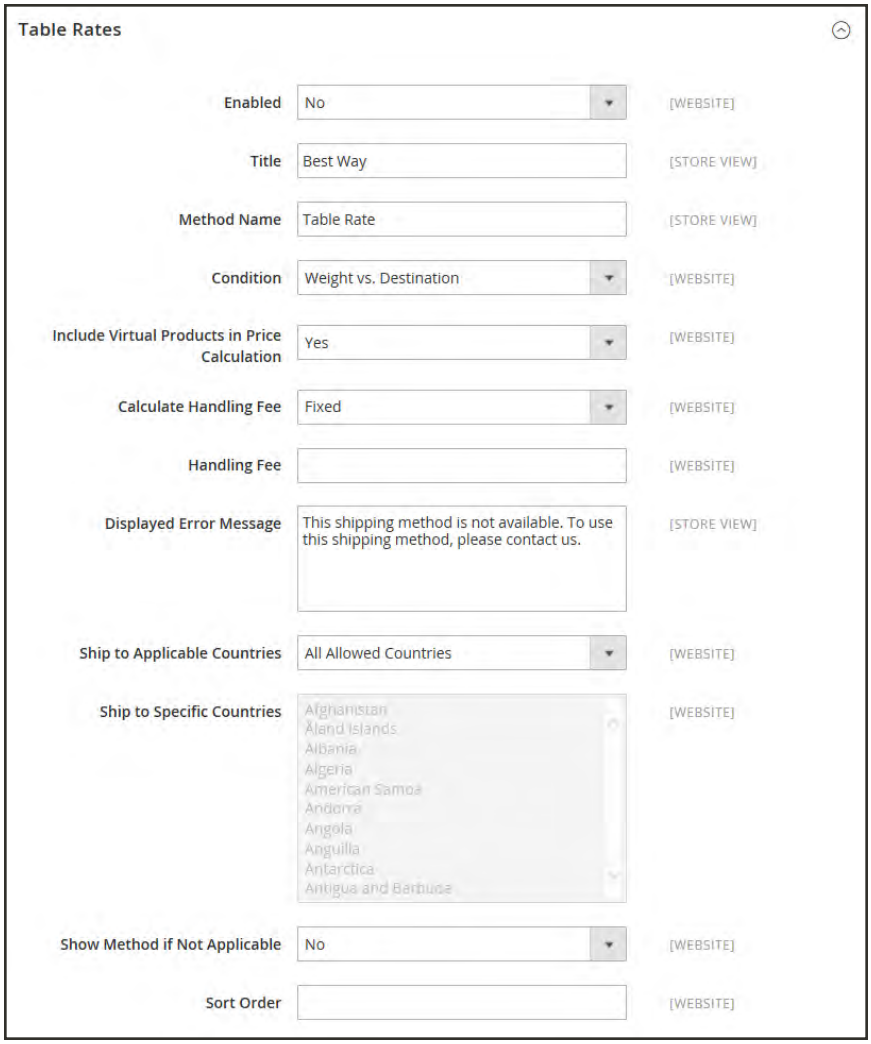


Table Rates

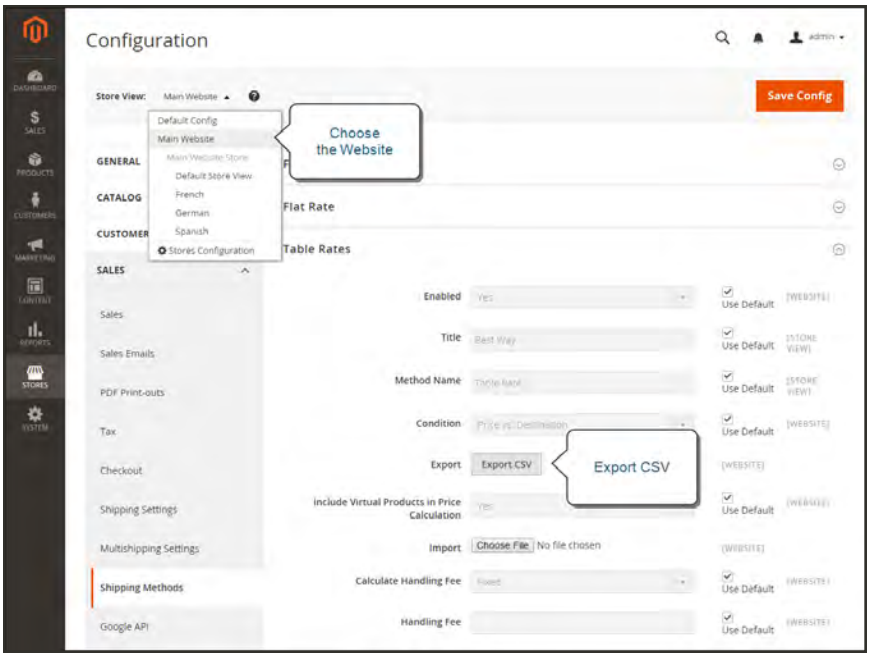
Step 2: Prepare the Table Rate Data

1. In the upper-left corner, set **Store View** to "Main Website," or to any other website where the configuration applies. Then when prompted to confirm, tap **OK**.

   The Export and Import options appear in the Table Rates section, with "Use Default" checkboxes to the right of each option.

   > To change any of the current settings, you must first clear the "Use Default" checkbox next to the field.

2. To change the **Condition**, clear the **Use Default** checkbox. Then, choose another option.
3. Tap **Export CSV**. Then, save the **tablerates.csv** file to your computer.



Export CS

4. Open the file in a spreadsheet. Then, complete the table with appropriate values for the shipping calculation condition.
   - Use an asterisk (*) as a wildcard to represent all possible values in any category.
   - The Country column must contain a valid three-character code for each row.

	A	B	C	D	E	F
1	Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price	
2	USA	*	*	0	5	
3	USA	*	*	10	10	
4	USA	*	*	20	15	
5						
6						

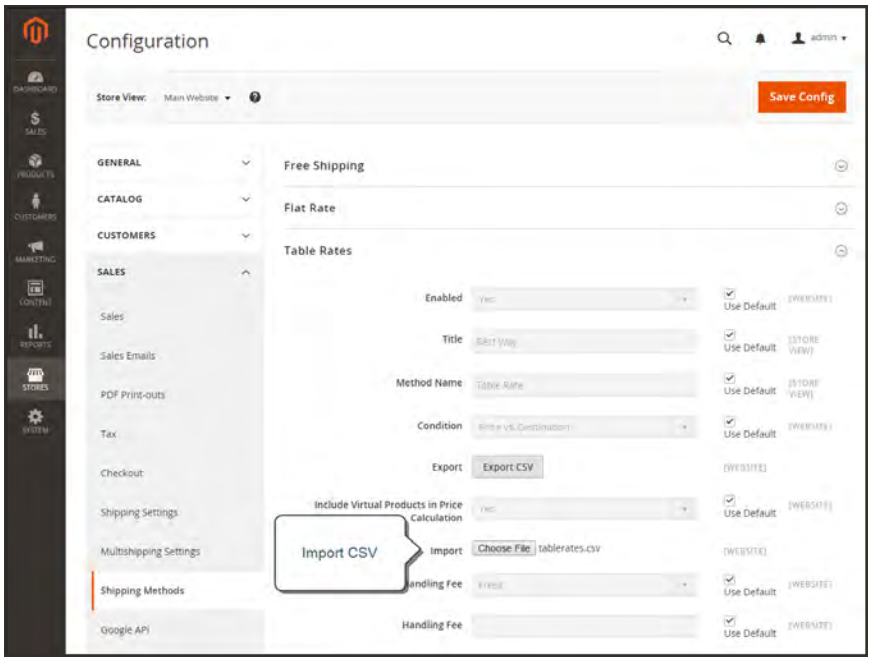
Sheet1 Sheet2 Sheet3

Weight vs. Destination

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.



Import Table 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.

Table Rate Examples

Example 1: Price v. Destination

This example uses the Price v. Destination condition to create a set of three different shipping rates based on the amount of the order subtotal for the continental United States, Alaska, and Hawaii. The asterisk (*) is a wildcard that represents all values.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	ORDER SUBTOTAL (and above)	SHIPPING PRICE
USA	*	*	0	15
USA	*	*	50	10
USA	*	*	100	5
USA	AK	*	0	20
USA	AK	*	50	15
USA	AK	*	100	10
USA	HI	*	0	20
USA	HI	*	50	15
USA	HI	*	100	10

Example 2: Weight v. Destination

This example uses the Weight v. Destination condition to create a set of three different shipping rates based on the weight of the order..

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	WEIGHT (AND ABOVE)	SHIPPING PRICE
USA	*	*	0	5
USA	*	*	10	10
USA	*	*	20	15

Example 3: Restrict Free Shipping to the Continental U.S.

You can use table rates to limit free shipping to only the continental United States, while excluding Alaska and Hawaii.

1. Create a `tablerates.csv` file that includes all the state destinations to which you are willing to provide free shipping.
2. Complete the table rate configuration with the following settings:

SETTING	VALUE
Condition	Price v. Destination
Method Name	Free Shipping
Ship to Applicable Countries	Specific Countries
Ship to Specific Countries	Select only United States
Show method if not applicable	No

3. Set **Store View** to the main website. Then, tap **Import** to import the `tablerates.csv` file.

Online Rates

Magento offers dynamic retrieval of rates from various shipping providers. See the carrier configuration to set up online rates.

- UPS
- USPS
- FedEx
- DHL

Setting up online rates is similar to setting up Flat Rates. Because the options differ for each service, contact the carrier for more information.

> Most shipping providers require that you open an account with them. Consult your shipping provider for details on how to obtain API credentials.

Notes

CHAPTER 69:

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 Enterprise Edition 2.0 installation.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

USPS

The United States Postal Service is the independent postal service of United States government. USPS offers domestic and international shipping services by land and air.

FedEx

Offers domestic and international shipping services by land and air to more than 220 countries.

DHL

Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

UPS now uses dimensional weight to determine some shipping rates.

Process Overview:

Step 1: Open a UPS Shipping Account

Step 2: Enable UPS for Your Store

Step 3: Complete the Container Description

Step 4: Set Up Handling Fees

Step 5: Specify Allowed Methods and Applicable Countries

Step 1: Open a UPS Shipping Account

To offer this shipping method to your customers, you must first open an account with UPS.

Step 2: Enable UPS for Your Store

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, do the following:
4. Set **Enabled for Checkout** to "Yes."
5. For a standard UPS account, set **UPS Type** to "United Parcel Service." Then in the **Gateway URL** field, enter the URL that is used to calculate UPS shipping rates. This field is preset by default, and normally does not need to be changed.

   To generate shipping labels, UPS Type must be set to "United Parcel XML."

6. For a UPS XML account, do the following:
   a. Set **UPS Type** to "United Parcel Service XML."
   b. Enter the following UPS credentials:
      - User ID
      - Access License Number
      - Password

c. Set **Mode** to "Live" to send data to the UPS shipping system over a secure connection. (Development mode does not send data over a secure connection.)

d. Verify the **Gateway XML URL** that is required to send requests by XML file.

e. Set **Order of Shipment** to the region where the shipment originates.

f. If you have special rates with UPS, set **Enable Negotiated Rates** to "Yes." Then, enter the six-digit **Shipper Number** assigned to you by UPS.

Step 3: Complete the Container Description

1. In the **Title** field, type the name of this shipping option that appears during checkout. By default, this field is set to "United Parcel Service."
2. Set **Packages Request Type** to one of the following:
   - Use origin weight (few requests)
   - Divide to equal weight (one request)
3. In the **Container** field, specify the typical packaging type that is used for shipment.
4. Set **Destination Type** to one of the following:

Residential	Most of your shipments are business to consumer (**B2C**[1]).
Commercial	Most of your shipments are business to business (**B2B**[2]).
Define Automatically	UPS determines the destination \as either residential or commercial, and uses the appropriate rate from the merchant's UPS account.

5. Set **Weight Unit** to the system you use to measure product weight. The weight system supported by UPS varies by country. If in doubt, ask UPS which weight system you should use. Options include:
   - LBS
   - KGS
6. Set **Pickup Method** to one of the following:
   - Regular Daily Pickup
   - On Call Air

[1]Business to Consumer: Business transactions between a business entity and a consumer.

[2]Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

- One Time Pickup
- Letter Center
- Customer Counter

7. Enter the **Maximum Package Weight** allowed by the carrier.
8. Enter the **Minimum Package Weight** allowed by the carrier.

Step 4: Set Up Handling Fees

1. Set **Calculate Handling Fee** to one of the following methods:
   - Fixed
   - Percent
2. To determine how the handling fee is applied, set **Handling Applied** to one of the following:
   - Per Order
   - Per Package
3. Enter the amount of the **Handling Fee** to be charged. To enter a percentage, use the decimal format. For example, enter 0.25 for 25%.

Step 5: Specify Allowed Methods and Applicable Countries

1. In the **Allowed Methods** list, select each UPS method offered to your customers. The methods appear under UPS during checkout. (Hold the Ctrl key down to select multiple options).
2. Set **Free Method** to the UPS service you want to use for offers of free shipping. Then, do one of the following:
   - Set **Free Shipping with Minimum Order Amount** to "Enable." Then, enter the **Minimum Order Amount for Free Shipping.**
   - Set **Free Shipping with Minimum Order Amount** to "Disable."
3. In the **Displayed Error Message box**, type the message customers see if UPS shipping becomes unavailable.
4. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

5. To create a log file with the details of UPS shipments made from your store, set **Debug** to "Yes."

6. Set **Show Method if Not Applicable** to one of the following:

Yes	To list all UPS shipping methods to customers, regardless of their availability.
No	To list only the methods which are available to customers.

7. In the **Sort Order** field, type a numeric value to determine the order in which UPS appears when listed with other shipping methods during checkout. The number with the highest priority is 0, which puts it at the top of the list.

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

USPS

The United States Postal Service is the independent postal service of United States government, offering domestic and international shipping services by land and air.

On January 17, 2016, USPS made changes to their services, rates, and package names. The updates are included in the Magento Enterprise Edition 2.0.1 release.

Process Overview:

Step 1: Open a USPS Shipping Account

Step 2: Enable USPS for Your Store

Step 3: Complete the Container Description

Step 4: Specify Allowed Methods and Applicable Countries

Step 1: Open a USPS Shipping Account

1. Open a USPS Web Tools account. After you complete the registration process, you will receive your User ID and a URL to the USPS test server.
2. You can also open a USPS Web Tools account. After you complete the registration process, you will receive your User ID and a URL to the USPS test server. To learn more about USPS Web Tools, see their Technical Documentation.

Step 2: Enable USPS for Your Store

1. On the Admin menu, select **System > Configuration.**
2. In the Configuration panel on the left, under Sales, click **Shipping Methods.**
3. Click to expand the **USPS** section. Then, do the following:
   a. Set **Enabled for Checkout** to "Yes."
   b. The **Gateway URL** is needed to access USPS shipping rates. The field is preset by default, and normally does not need to be changed.
   c. Enter a **Title** for this shipping method that will appear during checkout.
   d. Enter the **User ID** for your USPS account.

Step 3: Complete the Container Description

1. Set **Container** to the type of packaging usually used to ship products ordered for your store. Options include:
   - Variable
   - Flat-Rate Box
   - Flat-Rate Envelope
   - Rectangular
   - Non-Rectangular
2. Set the **Size** of the typical package shipped from your store. Options include:
   - Regular
   - Large
   - Oversize
3. Set **Machinable** to one of the following:

Yes	If your typical package can be processed by a machine.
No	If your typical package must be processed manually.

Step 4: Specify Allowed Methods and Applicable Countries

1. In the **Allowed Methods** list, select each USPS offered to your customers. The methods will appear under USPS during checkout. (Hold the Ctrl key down to select multiple options). Then, do the following:
   a. Set the **Free Method** list to the method you want to use for free shipping. You may also select **None.**
   b. Set the **Free Shipping with Minimum Order Amount** to one of the following:

Enable	Provides free shipping for orders that meet the minimum monetary amount specified. Then in the field below, enter the Minimum Order Amount for Free Shipping.
Disable	Does not provide free shipping based on minimum order amount.

2. The **Displayed Error Message** text box is preset with a default message. You can either leave this message or you can type the message you want your customers to see if USPS shipping becomes unavailable.
3. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

4. Set **Show Method if Not Applicable** to one of the following:

Yes	Lists all available USPS shipping methods during checkout, including those that don't apply to the shipment.
No	Lists only the USPS shipping methods that are applicable to the shipment.

5. Set **Debug** to "Yes" to create a log file with the details of all USPS activity related to your store.
6. In the **Sort Order** field, enter a numeric value to determine the order in which USPS shipping method appears in the list with other shipping methods during checkout. The highest value is zero, which puts it at the top of the list.
7. When complete, click the **Save Config** button.

FedEx

FedEx is one of the world's largest shipping service companies, providing air, freight, and ground shipping services with several levels of priorities.

FedEx now uses dimensional weight to determine some shipping rates.

Process Overview:

Step 1: Register for FedEx Web Services Production

Step 2: Enable FedEx for Your Store

Step 3: Package Description and Handling Fee

Step 4: Allowed Methods and Applicable Countries

Step 1: Register for FedEx Web Services Production

You must create a FedEx merchant account and register for FedEx Web Services Production Access. After creating a FedEx account, read through the production account information page, then click the Obtain Production Key link at the bottom of the page to register and obtain a key.

Make sure to copy or write down the authentication key. You will need it to set up FedEx in your Magento shipping settings.

Step 2: Enable FedEx for Your Store

1. On the Admin menu, select **System > Configurations**. Then in the panel on the left, under Sales, select **Shipping Methods.**
2. Click to expand the **FedEx** section, and do the following:
   a. To activate the FedEx shipping method, set **Enabled for Checkout** to "Yes."
   b. Enter an appropriate **Title** to identify this shipping method during checkout.
   c. Enter the following information from your FedEx account:
      - Account ID
      - Meter Number
      - Key
      - Password

d. If you have set up a FedEx sandbox and want to work in the testing environment, set **Sandbox Mode** to "Yes."

> Remember to set Sandbox Mode to "No" when you are ready to offer FedEx as a shipping method to your customers.

Step 3: Package Description and Handle Fee

1. Select the **Packages Request Type** to the option that best describes your preference when splitting an order into multiple shipments:
   - Divide to equal weight (one request)
   - Use origin weight (few requests)
2. Select the type of **Packaging** typically used to ship products from your store. Options include:
   - FedEx Envelope
   - FedEx Pak
   - FedEx Box
   - FedEx Tube
   - FedEx 10kg Box
   - FedEx 25kg Box
   - Your Packaging
3. Set **Dropoff** to the pick-up method that will be used for delivery. Options include:

Regular Pickup	If you have a high volume of shipments, it can be cost effective to make arrangements with FedEx for regular pickups.
Request Courier	You must call and request a FedEx courier to pick-up shipments.
Drop Box	You must drop off shipments at your nearby FedEx drop box.
Business Service Center	You must drop off shipments at your local FedEx business service center.
Station	You must drop off shipments at your local FedEx station.

4. Set **Weight Unit** to the unit of measurement that is used in your locale. Options include:
   - Pounds
   - Kilograms
5. Enter the **Maximum Package Weight** allowed for FedEx shipments. The default FedEx maximum weight is 150 lbs. Please consult your shipping carrier for more information. We recommend using the default value, unless you have made special arrangements with FedEx. See also: Dimensional Weight.

6. An optional handling fee can be added to the amount charged by FedEx, which is not visible during checkout. If you want to charge a handling fee, do the following:
   a. Set **Calculate Handling Fee** to one of the following:
      - Fixed Fee
      - Percentage
   b. In the **Handling Applied** list, choose one of the following methods for managing handling fees:
      - Per Order
      - Per Package
   c. Enter the **Handling Fee** as either a fixed amount or percentage, depending on the method of calculation.
7. Set **Residential Delivery** to one of the following, depending on whether you sell Business-to-Consumer (**B2C**[1]) or Business-to-Business (**B2B**[2]).

Yes	For B2C residential deliveries.
No	For B2B residential deliveries.

Step 4: Allowed Methods and Applicable Countries

1. Set **Allowed Methods** to each method of shipment that you want to offer. When choosing methods, take into consideration your FedEx account, the frequency and size of your shipments, and if you allow international shipments. You can offer as many or as few methods as you want. Options include:

Europe First Priority	Ground	International Priority
1 Day Freight	First Overnight	Intl Priority Freight
2 Day Freight	Home Delivery	Priority Overnight
2 Day	International Economy	Smart Post*
2 Day AM	Intl Economy Freight	Standard Overnight
3 Day Freight	International First	Freight
Express Saver	International Ground	National Freight

   * If offering the Smart Post method, enter the **Hub ID**.
2. To set up free shipping through FedEx, do the following:

[1]Business to Consumer: Business transactions between a business entity and a consumer.

[2]Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

a. Set **Free Method** to any shipping method that you want to offer your customers at no charge. You may also select **None**. This is similar to Free Shipping, however it is listed in the FedEx section, so customers will know exactly which method is being used for their order.

b. The **Free Shipping with Minimum Order Amount** option allows you to offer free FedEx shipping for orders that meet a minimum amount.

Enable	Lets you set the minimum amount for orders to qualify for free shipping. If an order does not meet the minimum amount, FedEx Free Shipping will still appear as an option,however it will be set to an amount determined by FedEx.
Disable	Does not let you set a minimum amount for orders to qualify for free shipping.

c. If you choose "Enable," enter the minimum order amount in the **Minimum Order Amount for Free Shipping**.

d. The **Displayed Error Message** text box is preset with a default message. You can leave this as is or edit as needed.

e. Set **Ship to Applicable Countries** to one of the following:

- All Allowed Countries
- Specific Countries

If applicable, set **Ship to Specific Countries** to each country where your customers are allowed to ship by UPS. (Hold the Ctrl key down to select multiple options.)

f. Set **Debug** to "Yes" or "No."

g. Set **Show Method if Not Applicable** to one of the following:

Yes	To list all FedEx shipping methods to customers, regardless of their availability.
No	To list only the methods which are available to customers.

h. Enter a **Sort Order** numeric value to determine the sequence in which UPS appears when listed with other shipping methods during checkout. The number with the highest priority is 0, which puts it at the top of the list.

3. When the configuration is complete, click the **Save Config** button.

DHL

DHL offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

Process Overview:

Step 1: Enable DHL

Step 2: Enter Package Description and Handling Fee

Step 3: Specify Allowed Shipping Methods

Step 4: Specify Applicable Countries

Step 1: Enable DHL

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Shipping Methods**.
2. Click to expand the **DHL** section. Then, do the following:
   a. Set **Enabled for Checkout** to "Yes."
   b. In the **Title** field, type a name that will be used to refer to this shipping method during checkout.
   c. In most cases, you can accept the default **Gateway URL**. However, if DHL has given you an alternate URL, enter the value in this field.
   d. Use the credentials provided by DHL to complete the following fields:
      - Access ID
      - Password
      - Account Number

Step 2: Enter Package Description and Handling Fee

1. In the **Content Type** list, select the option that best describes the type of package you ship:
   - Documents
   - Non documents
2. The handling fee is optional, and appears as an additional charge that is added to the DHL shipping cost. If you want to include a handling fee, do the following:

a. In the **Calculate Handling Fee** list, select the method you want to use to calculate handling fees:

- Fixed
- Percentage

b. In the **Handling Applied** list, select how you want the handling fees applied:

- Per Order
- Per Package

c. In the **Handling Fee** field, enter the amount to be charged, based on the method you have chosen to calculate the amount. For example, if the charge is based on a fixed fee, enter the amount as a decimal, such as: 4.90. However, if the handling fee is based on a percentage of the order, enter the amount as a percentage. For example, if you are charging six percent of the order, enter the value as: .06.

d. You can allow the total order weight to be broken up to ensure an accurate calculation of shipping charges. To permit this, set **Divide Order Weight** to "Yes."

e. Set the **Weight Unit** of the package to one of the following:

- Pounds
- Kilograms

f. Set the **Size** of the package to one of the following:

- Regular
- Specific

If you are using **Specific**, enter the **Height**, **Depth**, and **Width** of the package. Specify these numbers in centimeters.

Step 3: Specify Allowed Shipping Methods

1. In the **Allowed Methods list**, select each shipment method that you support. (Hold the Ctrl key down to select multiple options.)

   To display the correct list of shipping methods, you must first specify the Country of Origin in Shipping Settings.

2. Enter the **Ready Time** in hours after submission, that it takes for a package to be ready to ship.

3. Edit the **Displayed Error Message** as needed. This message appears when a selected method is unavailable.

4. In the **Free Method** list, select the shipping method you prefer to use for offers of free shipping. Then, set the **Free Shipping with Minimum Order Amount** to one of the following:

Enable	If offering Free Shipping with Minimum Order, enter the **Minimum Order Amount for Free Shipping**.
Disable	Does not apply free DHL shipping to any orders.

This is similar to the standard Free Shipping method, but appears in the DHL section so customers know which method is used for their order.

5. Enter the **Minimum Order Amount for Free Shipping** that must be met for a package to qualify.

Step 4: Specify Applicable Countries

1. Set **Ship to Applicable Countries** to one of the following:
   - All Allowed Countries
   - Specific Countries

   If shipping to specific countries, select each country from the **Ship to Specific Countries** list.
2. Set **Show Method if Not Applicable** to one of the following:

Yes	Displays all options,even if not applicable to the order.
No	Displays only applicable options.

3. In the **Sort Order** field, type a numeric value to determine the sequence in which DHL appears when listed with other shipping methods during checkout.
4. To create a log file with the details of DHL shipments made from your store, set **Debug** to "Yes."
5. When complete, click the **Save Config** button to save your changes.

Notes

CHAPTER 70:

Shipping Labels

Magento Enterprise Edition 2.0 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.

Shipping Labels

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.

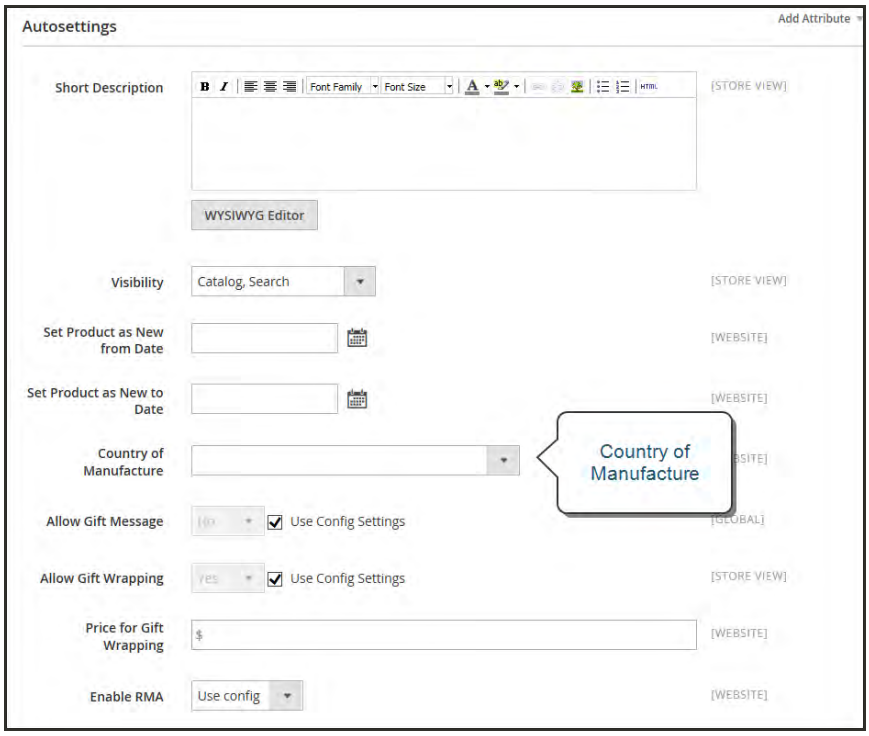
Step 1:Verify the Country of Manufacture

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**.
2. Use one of the following methods to verify the Country of Manufacture:

Method 1: Update a Single Record

1. In the grid, find the product to be updated, and open in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Autosettings**.
3. Update the **Country of Manufacture** field.
4. When complete, tap **Save**.



Country of Manufacture

Method 2: Update Multiple Records

1. In the grid, mark the checkbox of each product to be updated. For example, all products that are manufactured in China.
2. Set the **Actions** control to "Update Attributes." Then, tap **Submit**.
3. In the **Update Attributes** form, find the **Country of Manufacture** field and mark the **Change** checkbox. Then, choose the the country.
4. 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

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	You do not need to configure this field, it is pre-populated by Magento.
Password	The password is provided by USPS, and gives you access to their system through Web Services.
Length, Width Height, Girth	The default dimensions of the package. To make these fields appear, set Size to “Large.”

c. Expand the **FedEx** section, and verify that the following fields are complete:

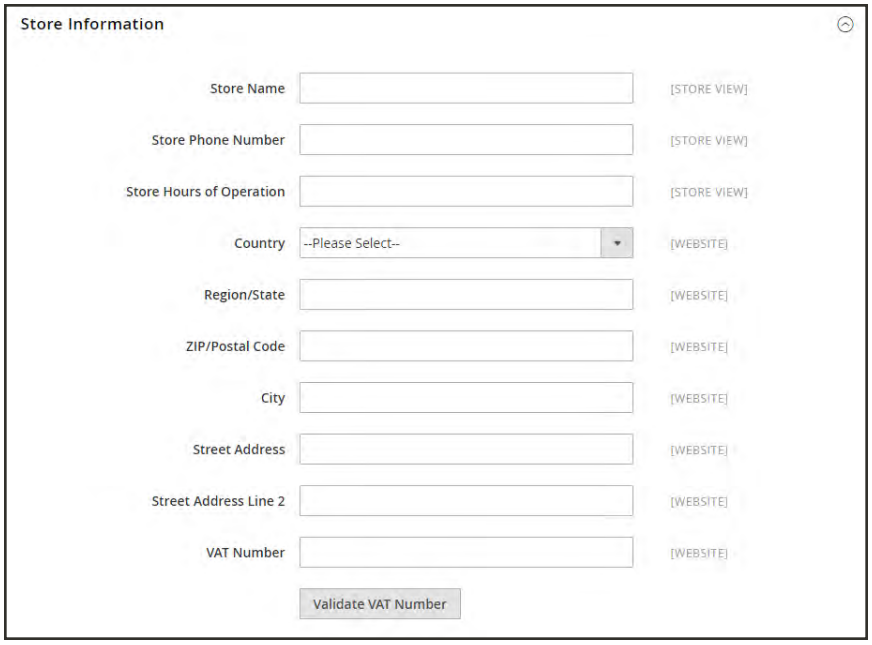
- Meter Number
- Key
- Password

This information is provided by the carrier, and is required to gain access to their system through Web Services.

d. In the panel on the left under **General**, choose **General**. Expand the **Store Information** section, and verify that the following fields are complete:

Store Name	The name of the store or store view.
Store Contact Telephone	The telephone number of the primary contact for the store or store view.
Country	The country where your store is based.
VAT Number	If applicable the Value Added Tax number of your store. (Not required for stores based in the U.S.)
Store Contact Address	The street address of the primary contact for the store or store view.

e. If you have multiple stores, and the contact information differs from the default, set **Store View** for each, and verify that the information is complete. If the information is missing, you'll get an error when you try to print the labels.



Store Information

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

Carrier Requirements

CARRIER	REQUIREMENTS
USPS	Requires a USPS account.
UPS	Requires a UPS account. Shipping labels are available only for shipments that originate in the U.S. Specific credentials are required for stores outside the US.
FedEx	Requires a FedEx account. For stores outside of the U.S., shipping labels are supported for international shipments only. FedEx does not allow domestic shipments that originate outside of the U.S
DHL	Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.

Creating Shipping Labels

To create shipping labels, you must first set up your shipping carrier account to support labels. Then, follow the prompts to enter a description of the package and its contents.

Process Overview:

Step 1: Contact Your Shipping Carriers

Step 2: Update the Configuration for Each Carrier

Step 3: Create Shipping Labels

Step 4: Print Shipping 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 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**.

   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 Shipping Labels

Shipping labels are generated in PDF format, and can be printed from the Admin. Each label includes the order number and package number.

Because an individual shipment order for each package is created, multiple shipping labels might be received for a single shipment.

Process Overview:

Method 1: Print Label from Shipment Form

Method 2: Print Labels for Multiple Orders

Method 1: Print Label from Shipment Form

1. On the Admin sidebar, tap Sales. Then, do one of the following:
   - Choose **Orders**. Find the order in the grid, and open the record. In the panel on the left, choose **Shipments**. Then, open the shipment record.
   - Choose **Shipments**. Find the order in the grid, and open the record.
2. To download the PDF file, go to the Shipping and Tracking section of the form, and tap **Print Shipping Label**. Depending on your browser settings, the shipping labels can be viewed and printed directly from the PDF file.

The Print Shipping Label button appears only after the carrier generates labels for the shipment. If the button is missing, click **Create Shipping Label**. The button appears after Magento receives the label from the carrier.

Method 2: Print Labels for Multiple Orders

1. On the Admin sidebar, tap **Sales**. Then, choose one of the following:
   - Orders
   - Shipments
2. In the grid, mark the checkbox of each order with shipping labels to be printed.
3. Set the **Actions** control to "Print Shipping Labels."
4. Tap **Submit**.

A complete set of shipping labels is printed for each shipment that is related to the selected orders.

Required Carrier Configuration Settings

SETTING	DESCRIPTION
Type	Package types differ by carrier and method. The default package type for each carrier is initially selected. USPS does not require the package type for domestic shipments.
Customs Value	(International shipments only) The declared value or sales price of the contents of an international shipment.
Total Weight	The total weight of all products added to the package is calculated automatically. The value can also be changed manually, and entered as pounds or kilograms.

Required Carrier Configuration Settings (cont.)

SETTING	DESCRIPTION	
Length, Width, Height	(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.	
	Not Required	No confirmation of delivery is sent to the store by the shipping carrier.
	No Signature	A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.
	Signature Required	The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.
	Direct	(FedEx Only) FedEx obtains a signature from someone at the delivery address. If no one is available to sign for the package, the carrier tries to deliver the package at another time.
	Indirect	(FedEx Residential Deliveries Only) FedEx obtains the signature of someone, possibly a neighbor or building manager, at the delivery address. The recipient can leave a signed FedEx door tag to authorize the package to be left without anyone present to sign for it.
	Contents	(USPS Only) Select one of the following descriptions of the package: Gift Documents Commercial Sample Returned Goods Merchandise Other

Required Carrier Configuration Settings (cont.)

SETTING	DESCRIPTION	
	Explanation	(USPS Only) A detailed description of the package contents.
	Adult Required	The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.

Creating Label Packages

The Create Packages window appears when you choose to create a shipping label. You can start configuring the first package immediately.

To configure a package:

1. Complete the fields as described below.

   > If you select the non-default value in the Type field or choose to require a signature confirmation, the price of a shipment may differ from the one you charged to the customer.

2. To view a list of shipped products and add them to the package, tap **Add Products**.

   The Qty column shows the maximum quantity that is available to add. For the first package, the number is the total quantity of the product to be shipped.

3. Specify the products and quantities. To add the products to the package, tap **Add Selected Product(s) to Package** .

   - To add a new package, tap **Add Package**. You can add several packages, and edit them at the same time.
   - To delete a package, tap **Delete Package**.

   After products are added to the package, the quantity cannot be edited directly.

To increase the quantity:

1. Tap **Add Selection** .
2. Enter the additional quantity.

The number is added to the previous quantity of the product in the package.

To decrease the quantity:

1. Delete the product from the package.
2. Tap **Add Selection**.
3. Enter the new, smaller value.

After you distribute all products, the total number of the packages you are going to use equals the number of the last package in the list. The OK button is disabled until all shipped items are distributed to packages, and all necessary information is complete.

4. When complete, tap **OK** to generate the labels.

If you need to stop the process, tap **Cancel**. The packages are not saved, and the shipping label process is canceled.

Field Descriptions

FIELD	DESCRIPTION
Type	Specifies the type of a package. Select one of the predefined values. Available package types are different for each shipping carrier. 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. 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.
Total Weight	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.
Length	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.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Width	The width of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.
Height	The height of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.
Signature	Confirmation Defines delivery confirmation. Options include: Not Required — No delivery confirmation letter is sent to you. No Signature — A delivery confirmation letter without a recipient's signature is sent to you. Signature Required — The shipping carrier obtains the recipient's signature and provides you with its printed copy. Adult Required — The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.

Field Descriptions (cont.)

FIELD	DESCRIPTION	
	Direct (FedEx only)	FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.
	Indirect (FedEx only)	FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only. The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Contents	(Available for USPS shipments only) Description of the package contents. Options include: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS shipments only) Detailed description of the package content.

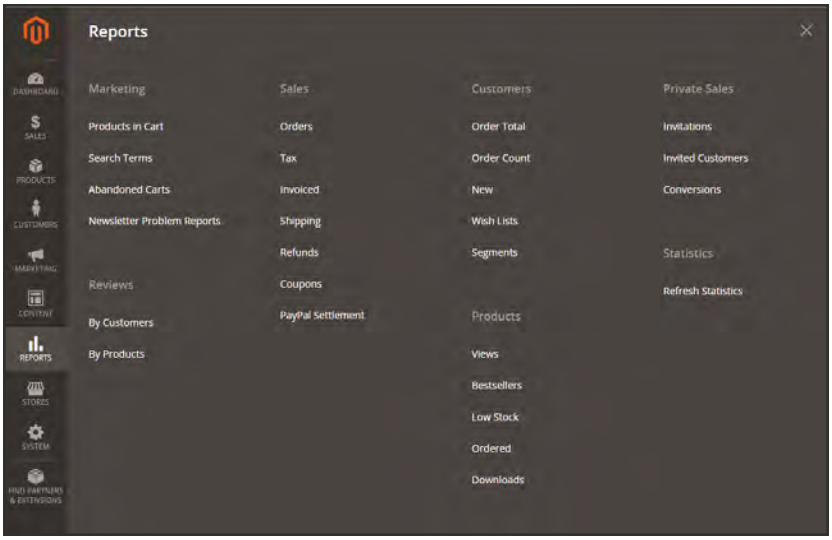
REPORTS

Contents

CHAPTER 71:

Reports Menu

The Reports menu provides easy access to current information about your sales, products, customers, and promotions.



Reports Menu

Marketing

A selection of marketing reports, that includes Products in Cart, Abandoned Carts, Search Terms, and Newsletter transmission problems.

Reviews

Reports on product reviews by customer and product.

Sales

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.

Customers

The selection of customer reports includes Order Total, Order Count, New customers, Wish Lists, and Customer Segments.

Products

The selection of product reports includes product Views, Ordered, Downloaded, Bestsellers, and Low Stock,

Private Sales

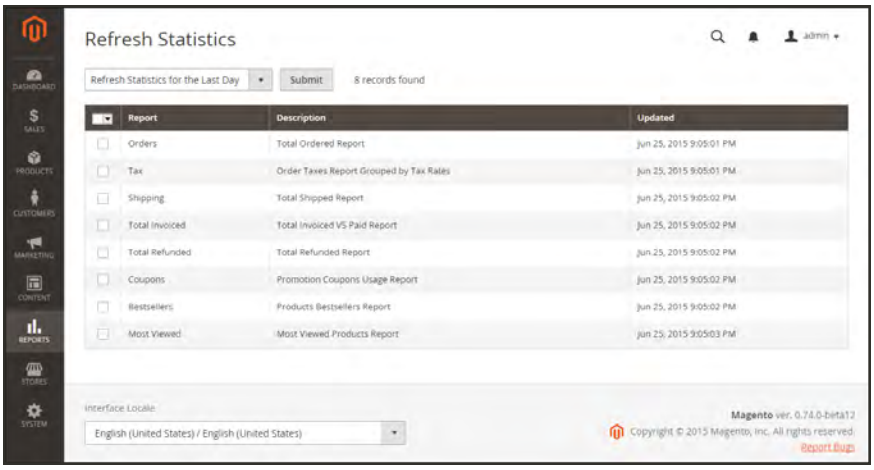
Reports on private sales and events include Invitations, Invited Customers, and Conversions.

Statistics

Statistics is a tool that reduces the performance impact of generating reports by calculating and storing statistical data. Rather than recalculate the statistics every time a report is generated, the stored statistics are used until you refresh the statistics.

Refresh Statistics

To reduce the performance impact of generating sales reports, Magento calculates and stores the required statistics for each report. Rather than recalculate the statistics every time a report is generated, the stored statistics are used, unless you refresh the statistics. To include the most recent data, the report statistics must be refreshed before a sales report is generated.



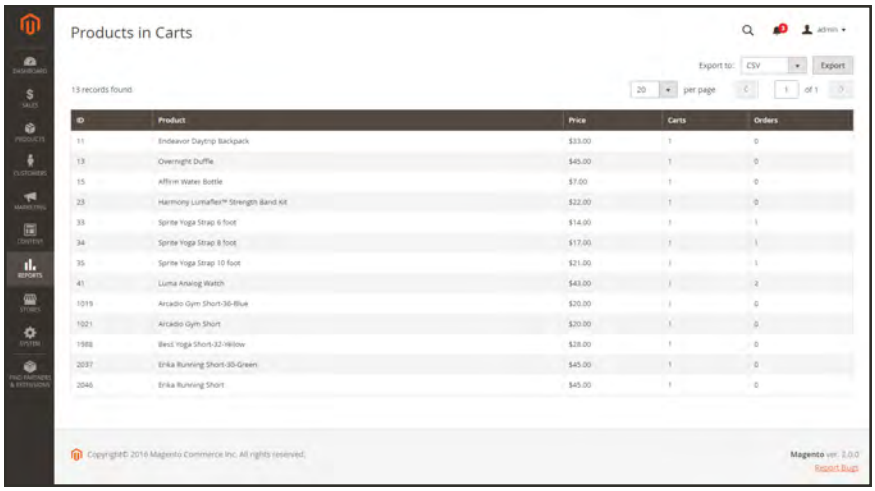
Refresh Statistics

To refresh report statistics:

1. On the Admin sidebar, tap **Reports**. Then under Statistics, choose **Refresh Statistics.**
2. In the list, mark the checkbox of each report to be refreshed.
3. Set the **Actions** control to one of the following:
   - Refresh Lifetime Statistics
   - Refresh Statistics for the Last Day
4. When complete, tap **Submit**.

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

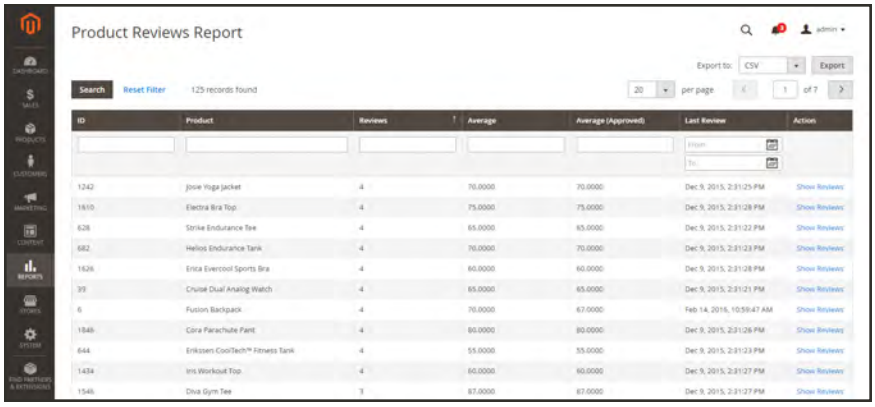
The Abandoned Carts Report lists all registered customers whoseabandoned carts have not yet expired. The report includes the customer name and email address, the number of products in the cart and subtotal, the date created, and date last updated.

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.

Review Reports

The Review Reports provide information about product reviews by customer and by product.



Review Report by Product

Reports

By Customers

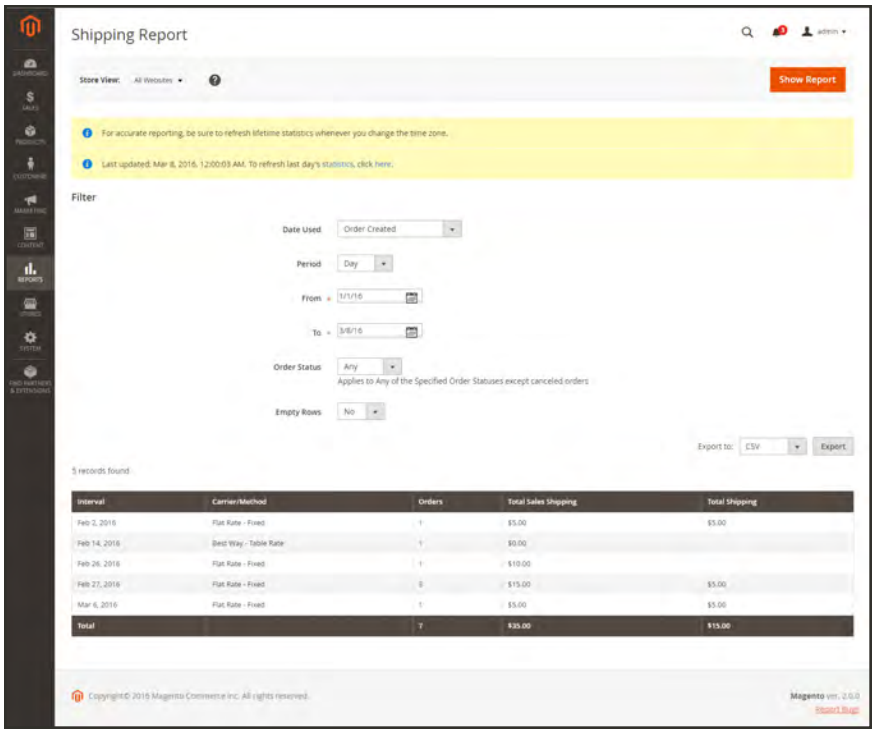
The Customer Reviews Report lists all customer who have submitted product reviews. The report includes the number of reviews submitted by each customer, and a link to the list of reviews.

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.

Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.



Shipping Report

Reports

Orders

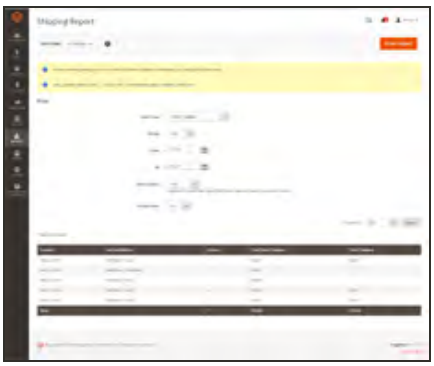
The Orders Report can be filtered by time interval, date and status. The report includes the number of orders placed and canceled, with totals for sales, amounts invoiced, refunded, tax collected, shipping charged, and discounts.

Tax

The Tax Report can be filtered by time interval, date, and status. The report includes the tax rule applied, tax rate, number of orders, and amount of tax charged.

Invoiced

The Invoice Report can be filtered by time interval, date, and status. The report includes the number of orderss 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

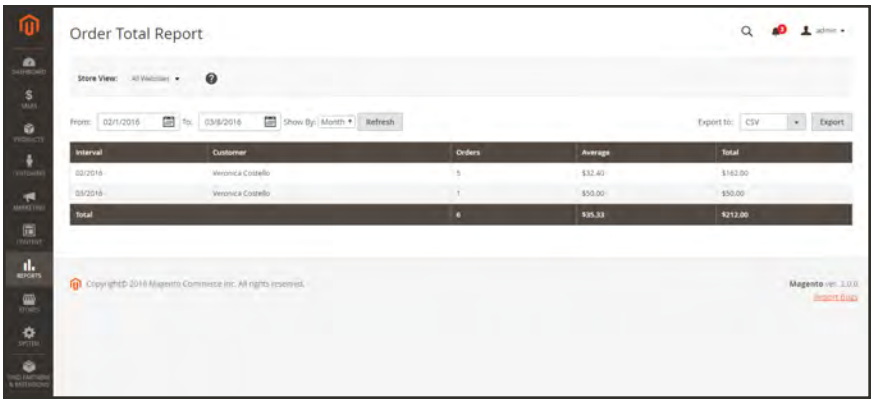
The Coupons Report can be filtered by time interval, date, and status. The report includes each coupon code used during the specified time interval, related price rule, and number of times used with totals and subtotals for sales and discounts.

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.

Customer Reports

Customer reports provide insight into customer activity during a specified period of time or date range.



Order Total Report

Reports

Order Total

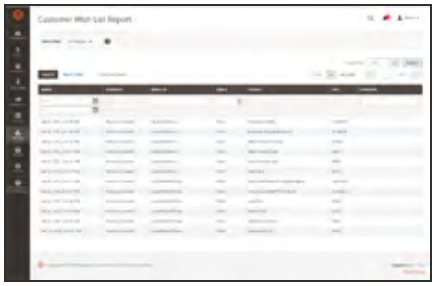
The Order Total Report shows customer orders for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.

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.



Wish Lists

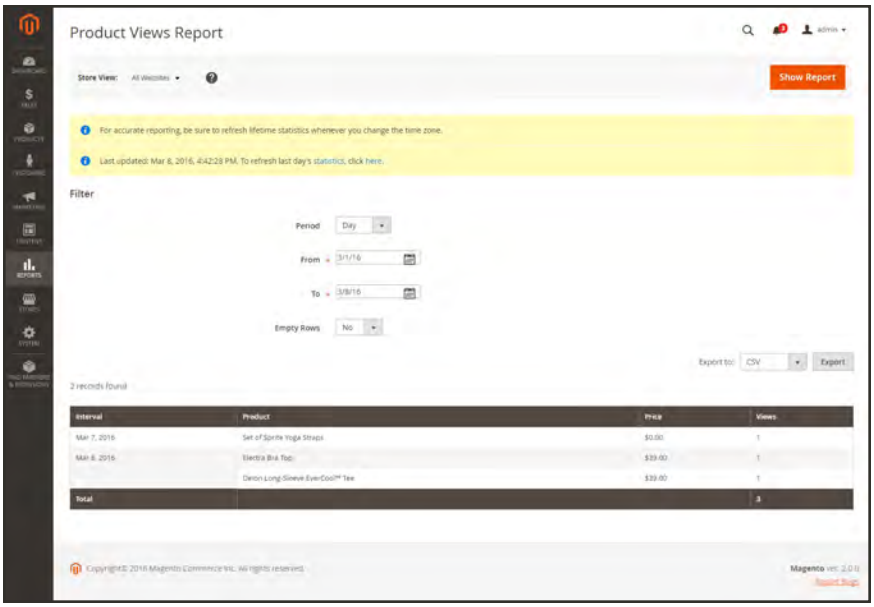
The Wish Lists report includes all wish lists created during a specified date range. The report can be filtered by wish list name, status. or comments.

Segments

The Segments report generates a list of all customer segments The list can be filtered by all columns.

Product Reports

The product reports give you insight regarding products viewed and ordered, bestsellers, stock levels, and downloads.



Product Views Report

Reports

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

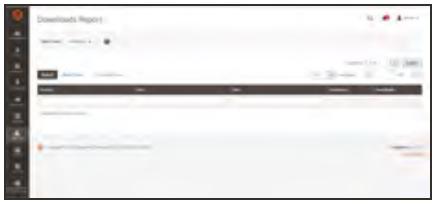
The Bestsellers Report Report shows the five top-selling five during an interval of time or date range. The report includes the product name, price, and quantity ordered.

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.

Private Sales Reports

The Private Sale 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.

Notes

OPERATIONS

Stores

Learn to manage the store hierarchy of websites, stores, and views. Manage taxes, and currency rates, and learn about the attributes that are used throughout the system. This section also includes a comprehensive configuration reference.

System

Learn how to import and export data, manage integrations and extensions, set up permissions, and protect your store with security best practices.

Tools

Learn how to perform routine index and cache management operations and back up the system. Additional tools gather data about your system that helps our Support team troubleshoot and resolve issues.

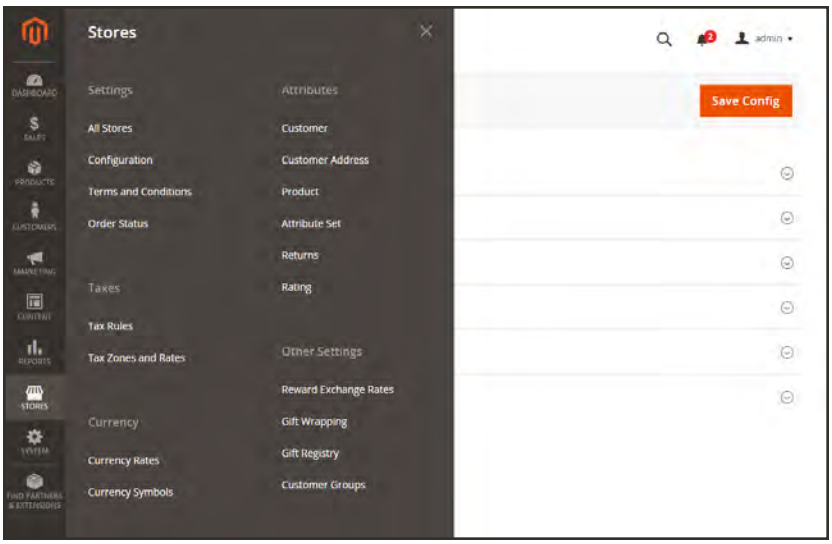
Stores

Contents

CHAPTER 72:

Stores Menu

The Stores menu manages settings that are used less frequently, but referenced throughout your Magento installation, including setting up the store hierarchy, configuration, sales and order settings, tax and currency, product attributes, product review ratings, and customer groups.

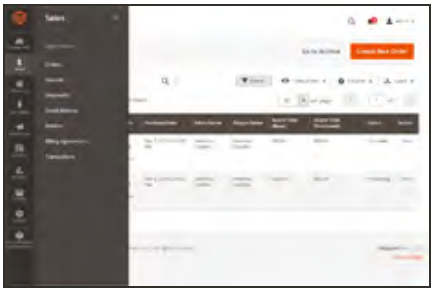


Stores Menu

Menu Options

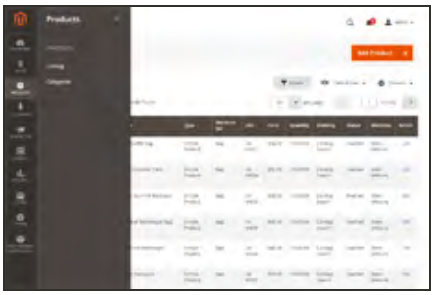
Settings

Manage settings for your websites, stores and store views. Includes All Stores, Configuration, Terms and Conditions, and Order Status.



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 all attributes used throughout the store for products, product ratings, customers, and returns. .You can create new attributes, edit existing attributes, and manage product templates.

Other Settings

Reward Exchange Rates

Reward Exchange Rates determine the number of points the customer earns, based on the order amount, as well as the value of the points earned.

Gift Wrapping

Gift wrapping 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 during checkout.

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. When you create a new registry, it becomes an option in the list of gift registry types in the customer account.

Customer Groups

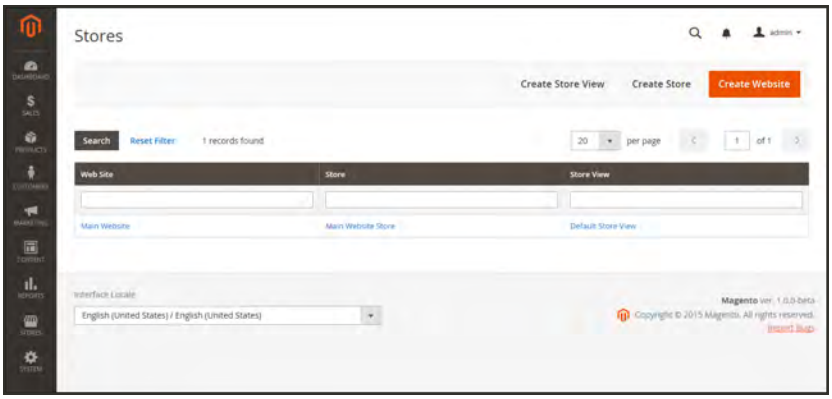
Customer groups determine which discounts are available, and the tax class that is associated with the group.

Notes

CHAPTER 73:

All Stores

When Magento Enterprise Edition 2.0 is installed, a main website, and store view are 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 separate domains. Within each website, you can have multiple stores, and within each store, separate store views.



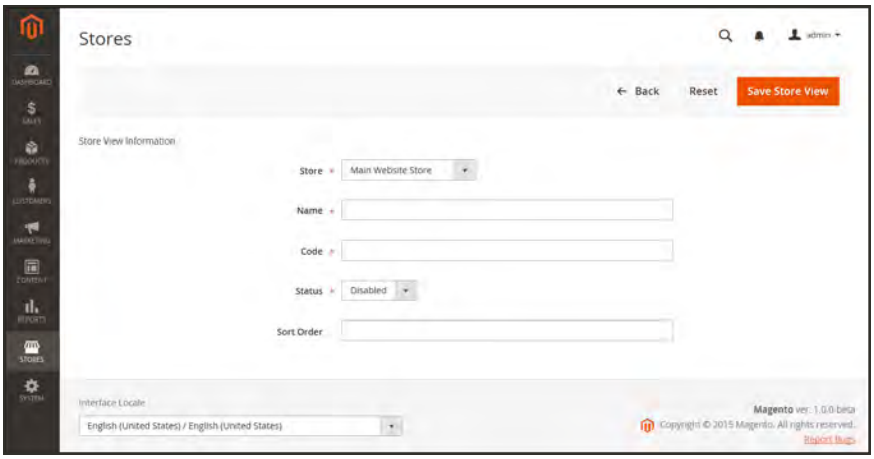
All Stores

Creating a Store View

Store views are typically used to make the store available in different languages. 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:



Store View Information

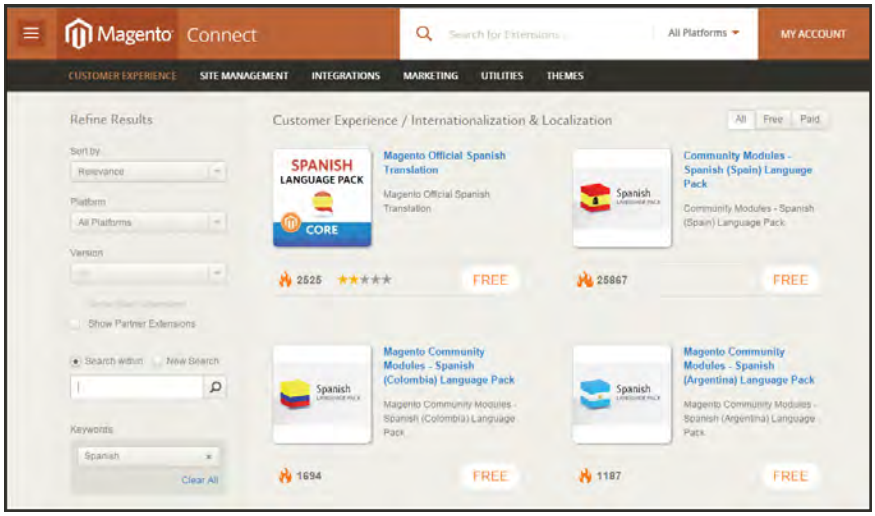
   a. Set **Store** to the parent store of this view.
   b. Enter a **Name** for this store view. The name appears in the "language chooser" in the header of the store. For example: Spanish.
   c. Enter a **Code** in lowercase characters to identify the view. For example: spanish.
   d. To activate the 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**.

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."

There is a wide selection of language packs available on Magento Connect. You can also use the Inline Translation tool to touch up any remaining interface text that was not translated for the locale, or to fine-tune the translated text.

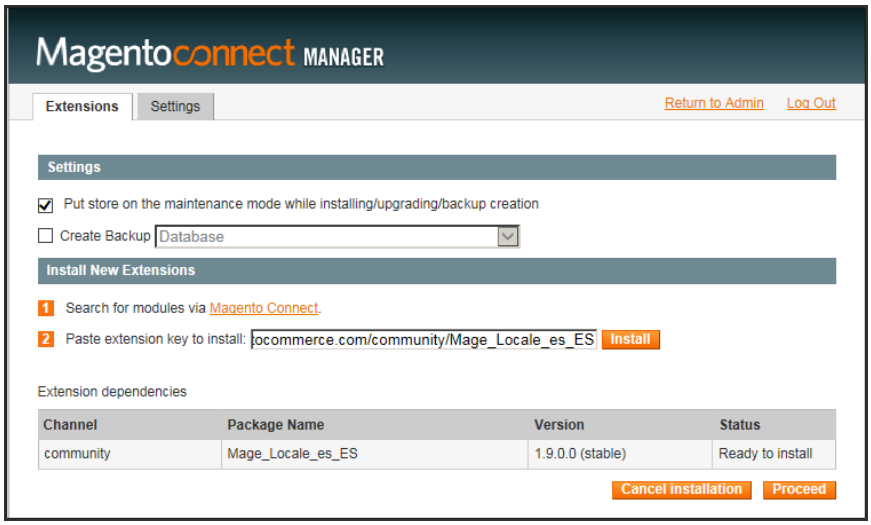
After changing the language of the locale, the remaining content that you have created, including product names and descriptions, categories, CMS pages, blocks, and polls must be translated separately for each store view.



Language Packs on Magento Connect

Step 1: Install a Language Pack

1. Log in to your Magento account.
2. Go to Magento Connect, and find the language pack that you want to download. Read the terms of the license, and click the checkbox to proceed.
3. Tap **Install Now**. Then, do the following:
   a. Tap **Get the Extension Key**.
   b. Tap **Select**. Then, copy the license key.
4. Return to your store Admin. On the Admin sidebar, tap **System**. Then under Extensions, choose **Integrations**.
5. When prompted, log in to **Magento Connect Manager**. Then, do the following:
   a. In the **Install New Extensions** section, paste your extension key.
   b. Tap **Install**. The language pack you have chosen appears below.



Install Language Pack

   c. When ready to begin, tap **Proceed**.
6. To return to your store, click the **Return to Admin** link at the top of the page.

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:

New Store View

a. Select the **Store** that is the parent of the view.

b. Enter a **Name** for the store view. For example: Spanish.

   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: spanish.

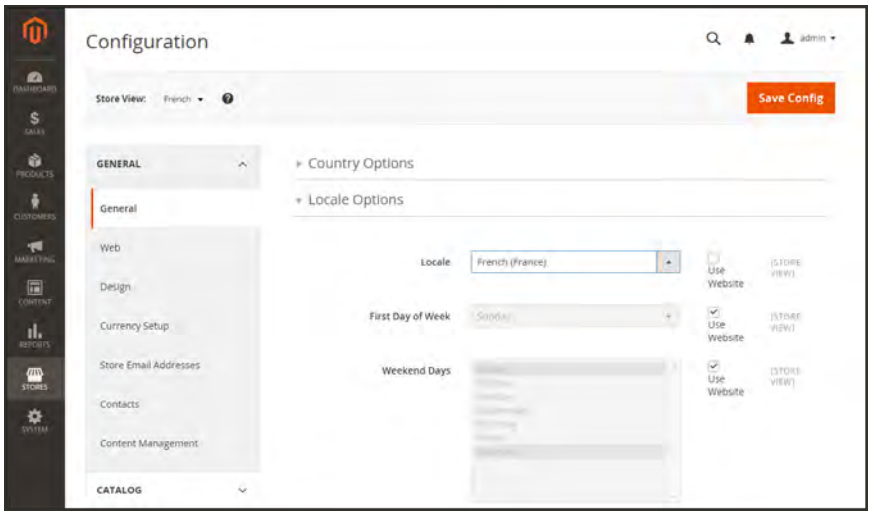
d. To activate the view, set **Status** to "Enabled."

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**.

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.



Changing the Locale for a View

If there are several variations of the language available, make sure to choose the one that matches the language pack that you installed. For example, the Spanish language pack downloaded in this example works only when the locale is set to "Spanish (Spain)." You need a different language pack to support a specific regional variation.

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

Translating Products

If your store has multiple views in different languages, the same products are available in each store view. You can use the same basic product information, such as SKU, price, and inventory level, regardless of language. Then, translate only the product name, description fields, and meta data as needed for each language.

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 Search Engine Optimization and 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 CMS 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, select the store view where the page is to be available.
5. In the panel on the left, choose **Content**. Then, complete the translated text for the page.
6. On the **Design** tab, set the column **Layout** of the page.
7. On the **Meta Data** tab, enter the translated text for the **Keywords** and **Description**.
8. When complete, tap **Save Page**.

9. If prompted to refresh the cache, click the link at the top of the page. Then, refresh any invalid caches.

10. Return to the storefront and set the language chooser to the store view.

    You might 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.

Creating a Store

Before you begin, take some time to plan your store hierarchy because it is referred to throughout the configuration. Each store can have a separate root category, which makes it possible to have a different main menu for each store.

A single installation of Magento can have multiple stores that share the same Admin. Multiple stores can share the same domain, be set up as subdomains of the same domain, or have entirely different domains. Stores that have the same IP address and domain, use the same security certificate, and share a single checkout process. If you want each store to have a dedicated checkout process under its own domain, each store must have a distinct IP address with a separate security certificate. Here are some examples of how URLs can be configured for multiple stores:

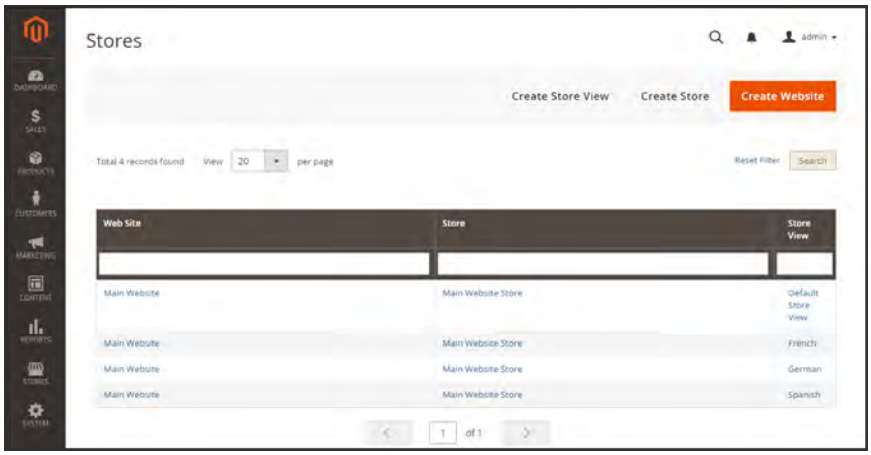
`yourdomain.com/store1` `yourdomain.com/store2`	Each store has a different path, but shares the same domain.
`store1.yourdomain.com` `store2.yourdomain.com`	Each store has a different subdomain of the primary domain.
`store1.com` `store2.com`	Each store has a dedicated domain.

The important thing to understand is that the stores use the same Magento code, share the same Admin, and catalog. They can, however, have different identities, product selections, and themes.

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:

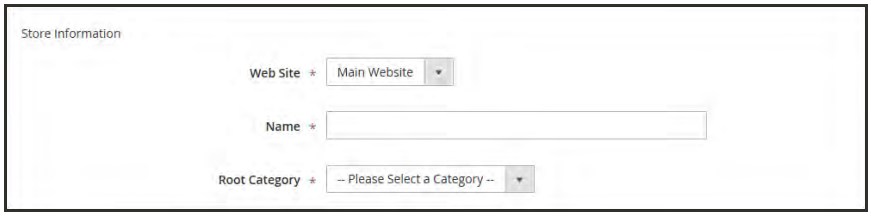
- To place the store one level below the primary domain, you don't have to do anything.
- Set up a subdomain of your primary domain.
- Set up a different primary domain.



Create Store

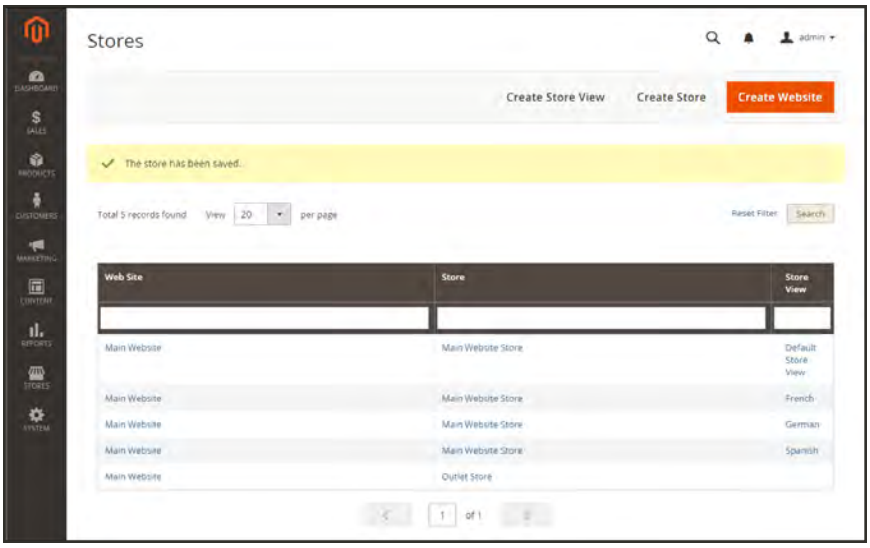
Step 2: Create the New Store:

1. On the Admin sidebar, tap **Stores**. Then under **Settings,** choose **All Stores**.
2. Tap **Create Store**. Then, do the following:
   a. Choose the **Web Site** that is to be the parent of the new store. If the installation has only one web site, accept the default, "Main Website."
   b. Enter a **Name** for the new store. The name is for internal reference only.
   c. Set **Root Category** to the root category that defines the category structure for the main menu of the new store. If you have already created a specific root category for the store, select it. Otherwise, select "Default Category." You can come back later and update the setting.



Store Information

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



New Store

Step 4: Create a Default Store View

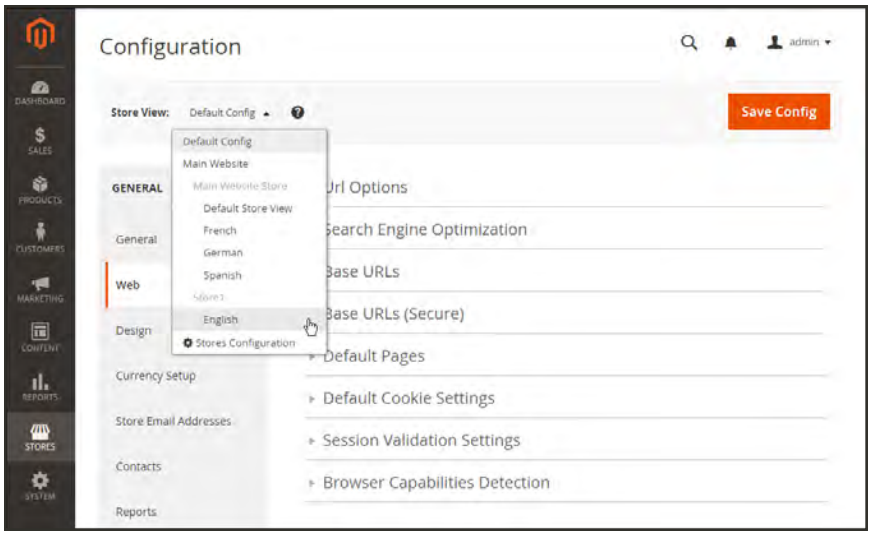
1. Tap **Create Store View**. Then, do the following:
   a. Enter a **Name** for the view. For example, "English."
   b. Enter a **Code** for the view in lowercase characters.
   c. Set **Status** to "Enabled."
   d. In the **Sort Order** field, enter a number to determine the store's position when listed with other stores.
2. Tap **Save Store View**.

   If you were to now open your store in edit mode, you would see that is has a default view.

New Store with Default View

Step 5: 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**.



4. Expand the **Base URLs** section. Then, do the following:
   a. After the Base URL field, clear the **Use Website** checkbox. Then, enter the **Base URL** for the store.

      In this example, the URL is a folder below the Magento root. You can either enter the fully qualified URL or use a markup tag as a placeholder for the base URL that was used previously for your initial default store.

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

Field Descriptions

FIELD	DESCRIPTION
Web Site	Identifies the parent website of the new store.
Name	A name for the store that is used for internal reference.
Root Category	Identifies the root category that contains the selection of categories for the new store's main menu.

Creating a Website

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.

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:

Website Information

   a. In the **Name** field, enter the domain of the new website. For example, “domain.com.”
   b. Enter a **Code** that will be used on the server to point to the domain. The code must begin with a lower-case letter, and can include any combination of letters (a-z), numbers (0-9), and the hyphen (-) character.
   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.
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

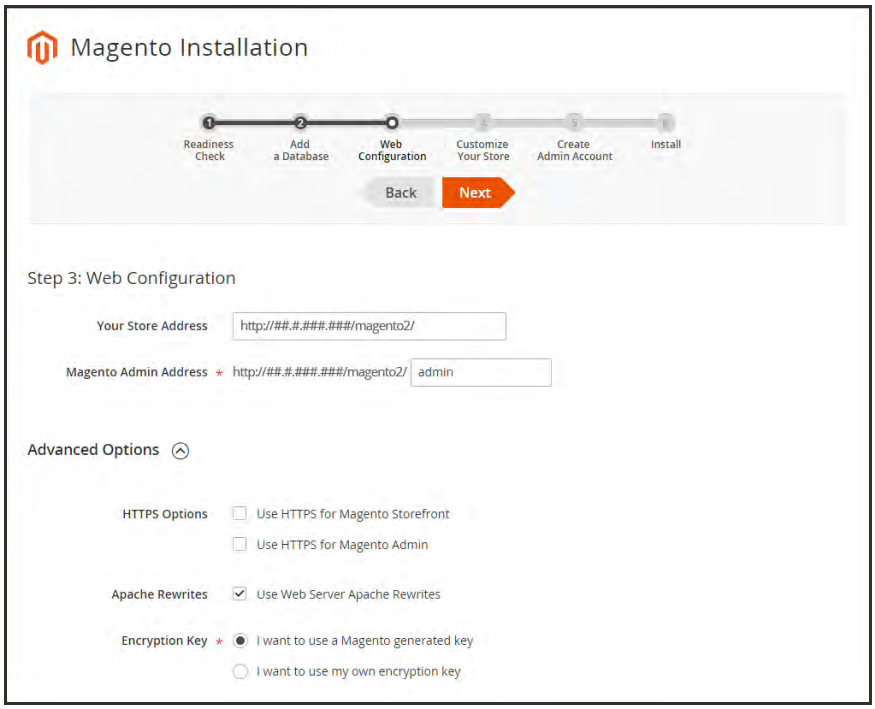
Each website in a Magento installation has a base URL that is assigned to the storefront and another URL that is assigned to the Admin. If you have a security certificate for your domain, you can configure either or both base URLs to operate over an encrypted SSL channel. All Magento resources and operations can be used over a secure SSL channel.

Standard base URLs begin with “http,” and secure base URLs begin with “https.” 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.

Base URL	`http://www.yourdomain.com/magento/`
Secure Base URL	`https://www.yourdomain.com/magento/`
URL with IP address	`http://###.###.###.###/magento/`

The base URLs that are associated with your store were initially set up during the Magento installation. If you had a security certificate available at the time, you could also choose to use secure (https) URLs for the store, Admin, or both. If you didn’t have a domain or security certificate at the time of the installation, make sure to update the configuration before launching your store.

If your Magento installation includes multiple stores, or if you plan to later add more stores, you can have the option to include the store code in the URL.



Web Configuration Options During Installation

> **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.

To configure the base URL:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand the **Base URL** section, and do the following:
   a. Enter the fully qualified **Base URL** for your store. Make sure to end the URL with a forward slash, so it can be extended with additional URL Keys from your store. For example:

   ```
   http://yourdomain.com/
   ```

   > Do not change the placeholder in the **Base Link URL** field. It is a placeholder that is used to create relative links to the Base URL.

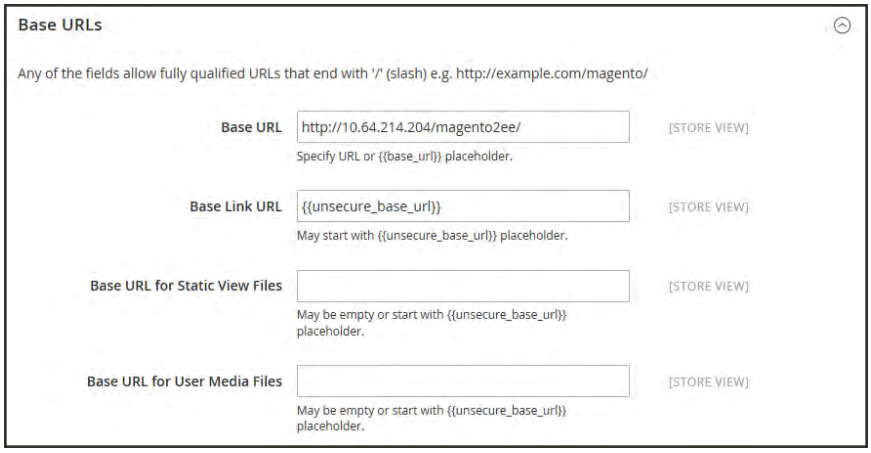
   b. (Optional) To specify an alternate location for the **Base URL for Static View Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

c. (Optional) To specify an alternate location for the **Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

For a typical installation, there is no need to update the paths for the static view files or media files because they are relative to the base URL.



Base URLs

The placeholders enclosed in double braces are markup tags for variables.

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

To include the store code in URLs:

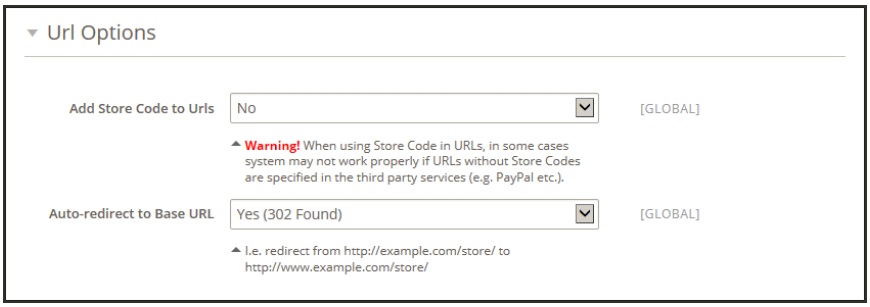
1. On the Admin sidebar, tap **System**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand the **URL Options** section.
4. Set **Add Store Code** to your preference.

URL with Store Code

```
http://www.yourdomain.com/magento/store-view/index.php/url-identifier
```

URL without Store Code

```
http://www.yourdomain.com/magento/index.php/url-identifier
```



URL Options

5. When complete, tap **Save Config**.
6. After the setting is saved, you will be prompted to refresh the cache. Tap the **Cache Management** link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.

Refresh Cache

To configure the secure base URL:

If your domain has a valid security certificate, you can configure the URLs for either the storefront and Admin—or both—to run over a secure (https) channel. Without a security certificate, your store cannot automatically switch to a secure channel (https) for transactions that normally take place over an encrypted, secure socket layer (SSL).

1. Expand the **Base URLs (Secure)** section. Then, do the following:
   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 a placeholder that is used to create relative links to the secure base URL.
   c. (Optional) To specify an alternate location for the **Secure Base URL for Static View Files**, enter the path starting with the following placeholder:

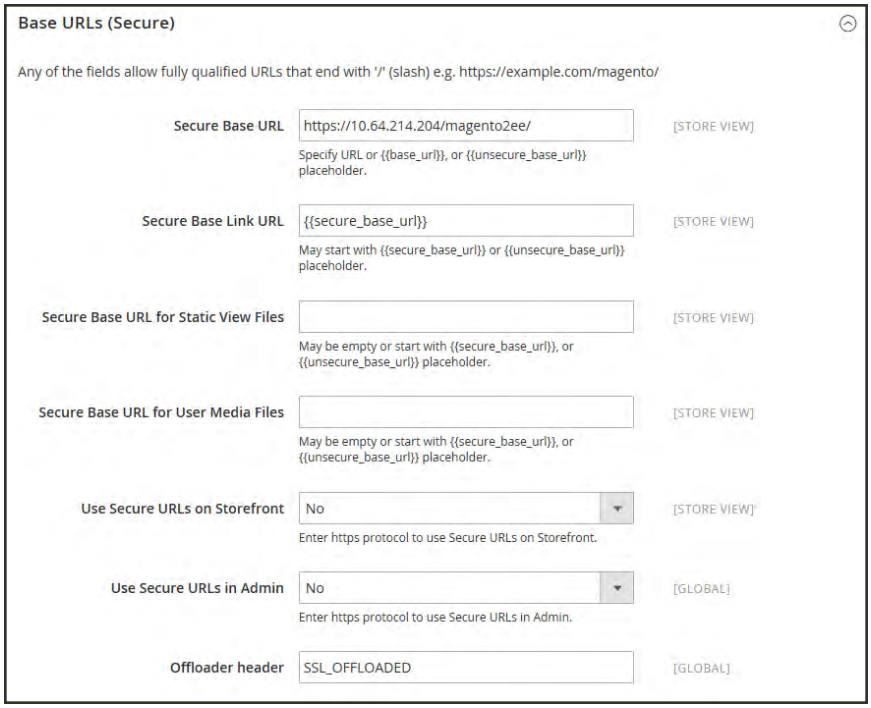
   ```
   {{secure_base_url}}
   ```

   d. (Optional) To specify an alternate location for the **Secure Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

e. If you want to run the entire storefront over a secure (https) channel, set **Use Secure URLs in Frontend** to "Yes."

f. If you want to run the entire Admin over a secure (https) channel, set **Use Secure URLs in Admin** to "Yes."



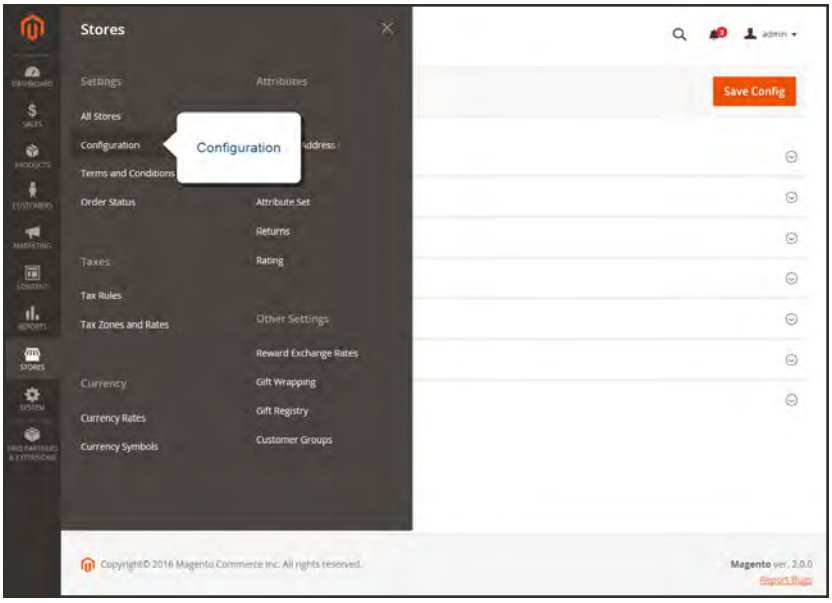
Base URLs (Secure)

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

CHAPTER 74:

Configuration

The Configuration Reference has field descriptions for every configuration setting in Magento Enterprise Edition 2.0. To learn how to apply configuration settings to specific store views, see: Configuration Scope.

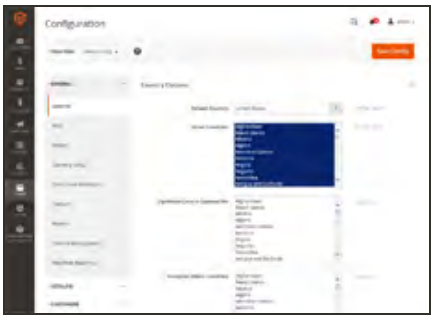


Configuration

To access the configuration:

1. On the Admin sidebar, tap **Stores**.
2. Under **Settings**, choose **Configuration**.

Store Configuration

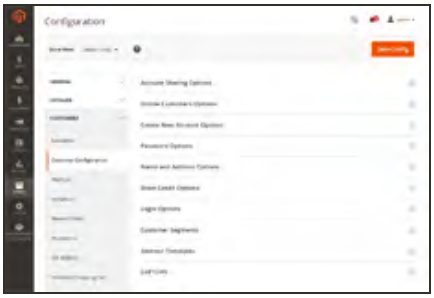


General

Includes basic configuration settings for the store, URLs, theme, currency, email addresses, store contacts, editor, and dashboard reports.

Catalog

Determines product and inventory settings, controls sitemap and RSS feed generation, and specifies the email template that is used to share products with friends.



Customers

Establishes basic customer account and login options, newsletter settings, wish lists, and the format of auto-generated coupon codes.

Sales

Determines checkout and tax settings,payment and shipping options, sales email and PDF print-outs, and GoogleAPI settings.

Services

Configures Magento API settings, including SOAP and OAuth.

Advanced

Determines default Admin settings, various system configuration settings, advanced module controls, and developer tools.

Notes

CHAPTER 75:

Taxes

In this section of the guide, you will learn how to set up taxes according to the requirements of your locale. You can set up tax classes for products and customer groups, and create tax rules that combine product and customer classes, tax zones, and rates. In addition, you'll learn more advanced topics such as setting up fixed product taxes, compound taxes, and displaying consistent prices across international borders. If you are required to collect a value-added tax, you will learn how to set up your store to automatically calculate the appropriate amount with validation.

Magento provides a variety of options to define taxes. Tax classes are used to define “tax rules.” Tax rules are a combination of a Product Class, a Customer Class and a Tax Zone and Rate. Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union.

Tax Rules

Tax rules incorporate a combination of product class, customer class and tax rate. Each customer is assigned to a customer class, and each product is assigned a product class. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the customer and product classes, and the region (based on the customer's shipping address, billing address or shipping origin).

> When numerous taxes must be defined, you can simplify the process by importing them.

Tax Rules

Step 1: Complete the Tax Rule Information

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. In the upper-right corner, tap **Add New Tax Rule**.
3. Under Tax Rule Information, do the following:

Tax Rule Information

   a. Enter a **Name** for the new rule.
   b. Choose the **Tax Rate**.
4. To edit an existing tax rate, tap the edit icon. Update the form as needed, and tap **Save**.
5. To enter new 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.
3. When complete, tap **Save**.

Enter New Tax Rate

Method 2: Import Tax Rates

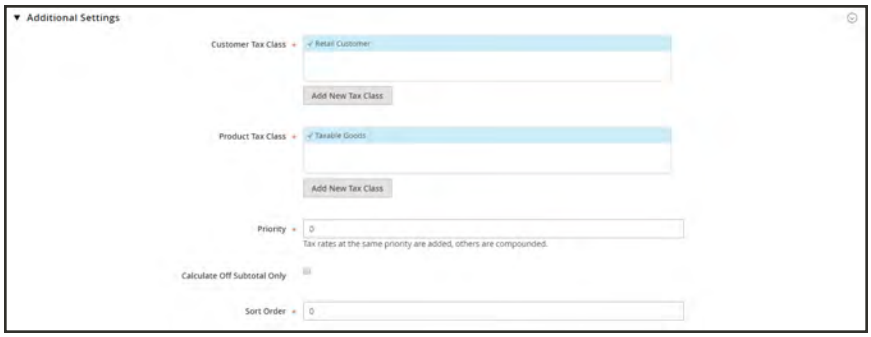
1. In the **Import Tax Rates** section at the bottom of the page, tap **Choose File**.
2. Select the CSV file that contains the tax rates that are needed for the rule, and tap **Import Tax Rates**.

   To learn more, see: Import/Export Tax Rates.

Import / Export Tax Rates

Step 2: Complete the Additional Settings

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



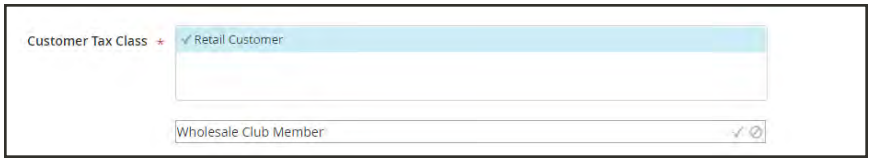
Additional Settings

a. Choose the **Customer Tax Class** to which the rule applies.

b. To edit a customer tax class, hover over the name of the tax class, and tap the edit icon. Then, update the form as needed, and tap **Save**.

Edit Tax Class

c. To create a new tax class, tap **Add New Tax Class**. Then, enter the name of the new class, and tap the checkmark to **Save**.



Add New Tax Class

d. Choose the **Product Tax Class** to which the rule applies. Then, repeat the same process as needed.

e. 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.

f. If you want taxes to be based on the order subtotal, mark the **Calculate off Subtotal Only** checkbox.

g. In the **Sort Order** field, enter a number to indicate the order of this tax rule when listed with others.

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

Field Descriptions

FIELD	DESCRIPTION
Name	The name of the tax rule.
Tax Rate	The tax rate that applies to this rule.
Add New Tax Rate	
ADDITIONAL INFORMATION	
Customer Tax Class	The customer tax class that is associated with this rule.
Add New Tax Class	
Product Tax Class	The product tax class that is associated with this rule.
Add New Tax Class	
Priority	Enter a number to indicate the priority of this tax, when more than one tax applies. Lower numbers have higher priority. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount.
Calculate off Subtotal Only	Select this checkbox for taxes to be calculated based on the subtotal of the order. This means that for this tax rule, tax applies only to the subtotal of the order.
Sort Order	Specify the order in which tax rules are displayed on the Manage Tax Rules page. Lower numbers have higher sort order in the list.

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 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, the class must be specified in the configuration as the tax class that is used for shipping.

EU Place of Supply

European Union (EU) merchants must report their digital goods sold by quarter to each member country. Digital goods such as downloadable products are taxed based on the customer's billing 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 billing 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 billing address matches payment provider information.)
  - The information can also be captured directly from the data store in the Magento database tables.

To collect digital goods tax information:

1. Load the tax rates for all EU member countries.
2. Create a digital goods product tax class.
3. Assign all your digital goods to the digital goods product tax class.
4. Create tax rules for your physical goods, using physical product tax classes, and associate them with the appropriate tax rates.
5. Create tax rules for your digital goods, using use the product tax class for digital goods, and associate them with the appropriate tax rates for EU member countries.
6. Run the tax report for the appropriate period, and collect the required digital goods information.
7. Export the tax amounts that are related to the tax rates for the digital goods product tax class.

See also:

European Commission Taxation and Customs Union

EU 1015 Place of Supply Changes

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).

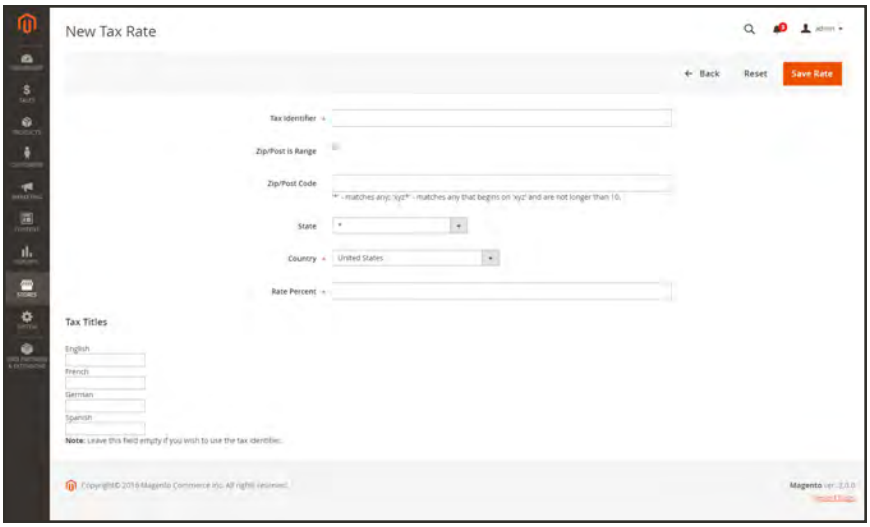
The calculation for tax that is collected by the store is based on the store's address. The actual tax that is included in an order is calculated after the customer completes the order information. Magento then calculates the tax based upon the tax configuration of the store.

Tax Zones and Rates

To define a new tax rate:

1. On the Admin sidebar, tap **Stores**. Under **Taxes**, choose **Tax Zones and Rates**.
2. In the upper-right corner, tap **Add New Tax Rate**.
3. Enter a **Tax Identifier**.
4. To apply the tax rate to a single ZIP or postal code, enter the code in the **Zip/Post Code** field.
5. The asterisk wildcard (*) can be used to match up to ten characters in the code. For example, 90* represents all ZIP codes from 90000 through 90999.
6. To apply the tax rate to a range of ZIP or postal codes, do the following::
   a. Mark the **Zip/Post is Range** checkbox.
   b. Enter the first and last **Zip/Post Code** in the range.
   c. Choose the **State** where the tax rate applies.
   d. Choose the **Country** where the tax rate applies.
   e. Enter the **Rate Percent** that is used for the tax rate calculation.

7. Under **Tax Titles**, enter a label for the tax rate, as needed, for each store view.
8. When complete, tap **Save Rate**.



New Tax Rate

To edit an existing tax rate:

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Zones and Rates**.
2. Find the tax rate in the Tax Zones and Rates grid, and open the record in edit mode.

   If there are many rates in the list, use the filter controls to find the rate you need.
3. Make the necessary changes to the **Tax Rate Information**.
4. Update the **Tax Titles** as needed.
5. When complete, tap **Save Rate**.

Import/Export Tax Rates

If you conduct business in several states and ship a large quantity of product, it is more efficient to download tax rates by ZIP code than enter the rates manually. The rates can then be imported into Magento. The following example shows how to import a set of California tax rates that was downloaded from the Avalara website. Avalara is a Magento Technology Partner, and provides tax rate tables that can be downloaded at no charge for every ZIP code in the United States.

Import/Export Tax Rates

Process Overview:

Step 1: Export the Magento Tax Rate Data

Step 2: Prepare the Import Data

Step 3: Import the Tax Rates

Step 1: Export the Magento Tax Rate Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export Tax Rates**.
2. Tap **Export Tax Rates**. Look for the download file in the lower-left corner of the browser window.
3. Save the file, and then open it in a spreadsheet. (In this example, we use OpenOffice Calc.)

   The exported Magento tax rate data includes the following columns:

   - Code
   - Country
   - State
   - Zip/Post Code

- Rate
- Range From
- Range To
- A column for each store view

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Code	Country	State	Zip/Post Code	Rate	Zip/Post is Range	Range From	Range To	english	french	german	spanish	
2	US-CA-*-Rate 1	US	CA	*	8.25								
3	US-NY-*-Rate 1	US	NY	*	8.375								
4	US-MI-*-Rate 1	US	MI	*	8.25								
5													
6													

Sheet1

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.

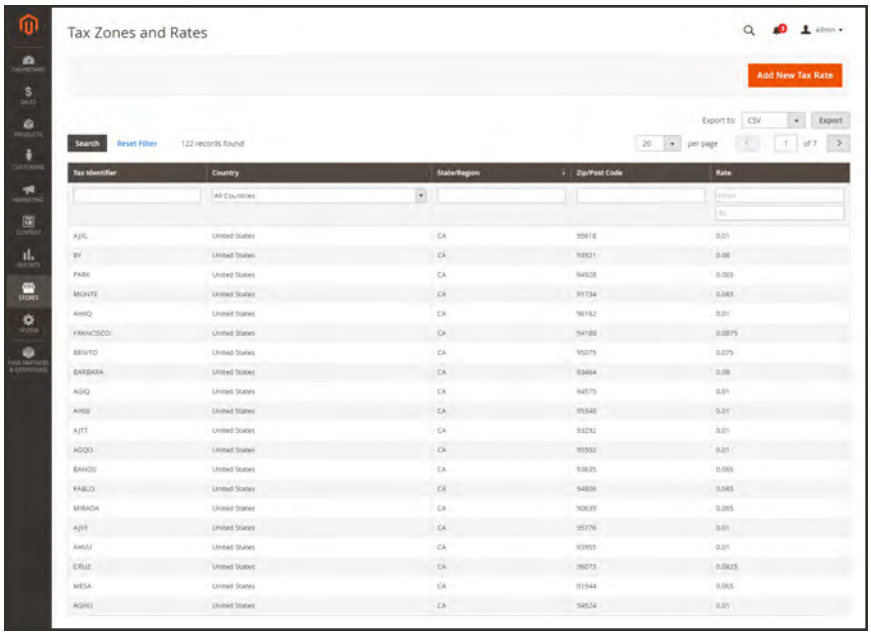
1. To create a place to work in the spreadsheet with the new data, insert as many blank columns at the far left as needed. Then, use cut and paste to rearrange the columns so they match the order of the Magento export data.
2. Rename the column headers to match the Magento export data.
3. Delete any 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.



Imported Tax Rates

4. Run some test transactions in your store with customers from different ZIP codes to make sure that the new tax rates work correctly.

Value Added Tax (VAT)

Some countries charge a value added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In this case you may need to use more than one VAT rate in your store for tax calculation purposes.

Configuring VAT

The following instructions include a sample procedure to set up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. To learn more, see: VAT Validation.

Process Overview:

Step 1: Set Up Tax Zones and Rates

Step 2: Set Up Customer Tax Classes

Step 3: Set Up Product Tax Classes

Step 4: Set Up Tax Rules

Step 5: Apply Tax Classes to Products

Step 1: Set Up Tax Zones and Rates

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Zones and Rates**.

Add New Tax Rate

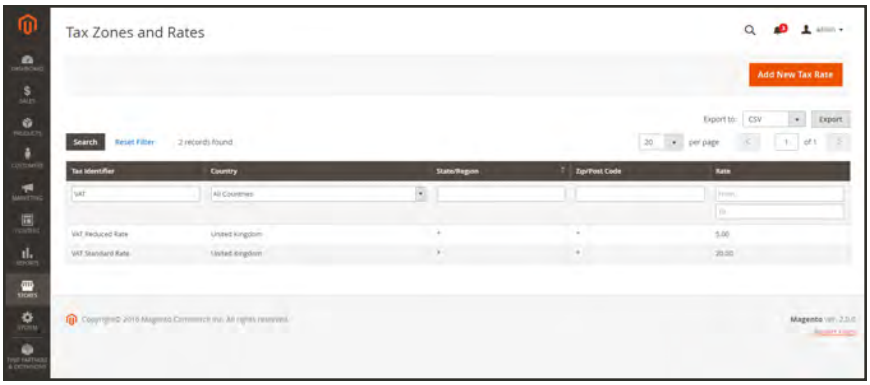
For this example you can remove the U.S. tax rates, or leave them as they are.

2. In the upper-right corner, tap **Add New Tax Rate** . Then, add the following new tax rates:

NEW TAX RATE	SETTINGS	
VAT Standard Rate	Tax Identifier:	VAT Standard
	Zip/Post Code:	*
	State:	*
	Country:	United Kingdom
	Rate Percent:	20.00
VAT Reduced Rate	Tax Identifier:	VAT Reduced
	Zip/Post Code:	*
	State:	*
	Country:	United Kingdom
	Rate Percent:	5.00

3. Tap **Save Rate** for each rate.

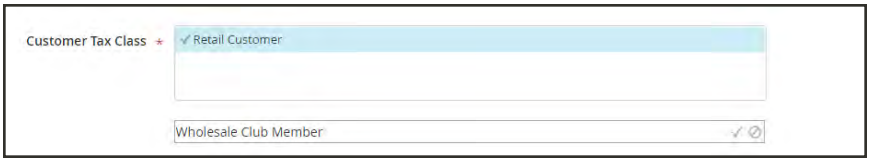
If you have many tax rates, you can use the grid filter controls to list only the new VAT rates.



New Tax Rates

Step 2: Set Up Customer Tax Classes

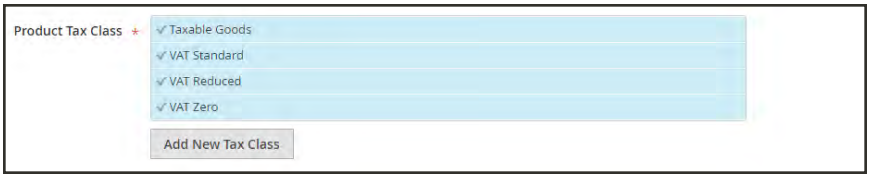
1. On the Admin sidebar, tap **Stores**. Then choose **Tax Rules**.
2. Expand the **Additional Settings** section. Then, do the following:
   a. In the **Customer Tax Class** box, make sure that there is an appropriate customer tax class to use with the VAT. If you need to create an additional class, tap **Add New Tax Class**.
   b. Enter a **Name** for the new customer tax class, and tap the checkmark to **Save**.



Add New Tax Class

Step 3: Set Up Product Tax Classes

1. In the **Product Tax Class** box, tap **Add New Tax Class**, Then, create the following product tax classes:
   - VAT Standard
   - VAT Reduced
   - VAT Zero



Product Tax Classes

2. Tap the checkmark ✓ to **Save** each new class.

Step 4: Set Up Tax Rules

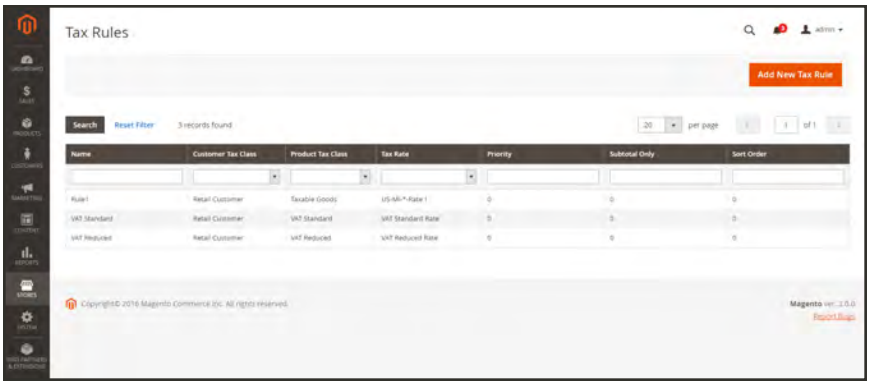
1. Continuing on the New Tax Rules page, under **Tax Rule Information**, follow these steps to add a new tax rule with these properties:

NEW TAX RULE	SETTINGS	
VAT Standard	Name:	VAT Standard
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Standard
	Tax Rate:	VAT Standard

   a. In the **Name** field, enter "VAT Standard."
   b. Expand the **Additional Settings** section.
   c. In the **Customer Tax Class** box, make sure that the "Retail Customer" tax class is selected
   d. In the **Product Tax Class** box, select."VAT Standard," and remove the checkmark from any other class.
2. Scroll down to the bottom of the **Tax Rate** box, and select "VAT Standard."
3. When complete, tap **Save Rule**.
4. When you return to the Tax Rules grid, tap **Add New Tax Rule**. Repeat the process to create a tax rule with the following properties:

NEW TAX RULE	SETTINGS	
VAT Reduced	Name:	VAT Reduced
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Reduced
	Tax Rate:	VAT Reduced

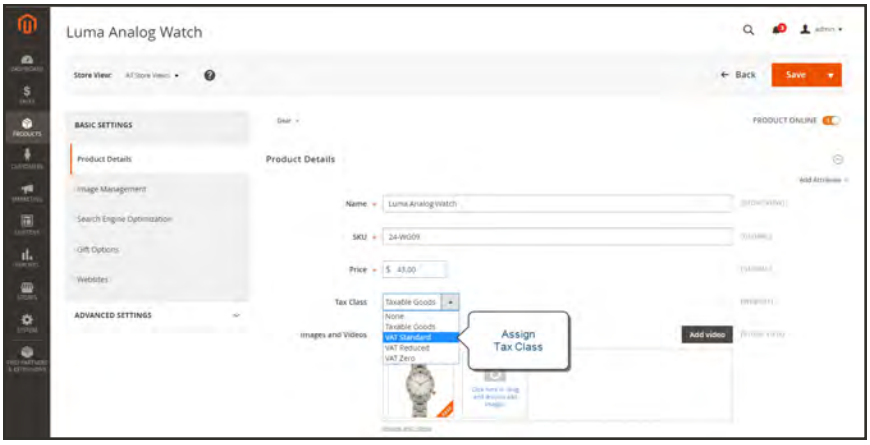
When complete, both new tax rules appear in the grid.



New VAT Tax Rules

Step 5: Apply Tax Classes to Products

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open a product from your catalog in edit mode.
3. Under **Product Details**, set **Tax Class** to the VAT class that you want to use for the product.



Tax Class

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

VAT 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.

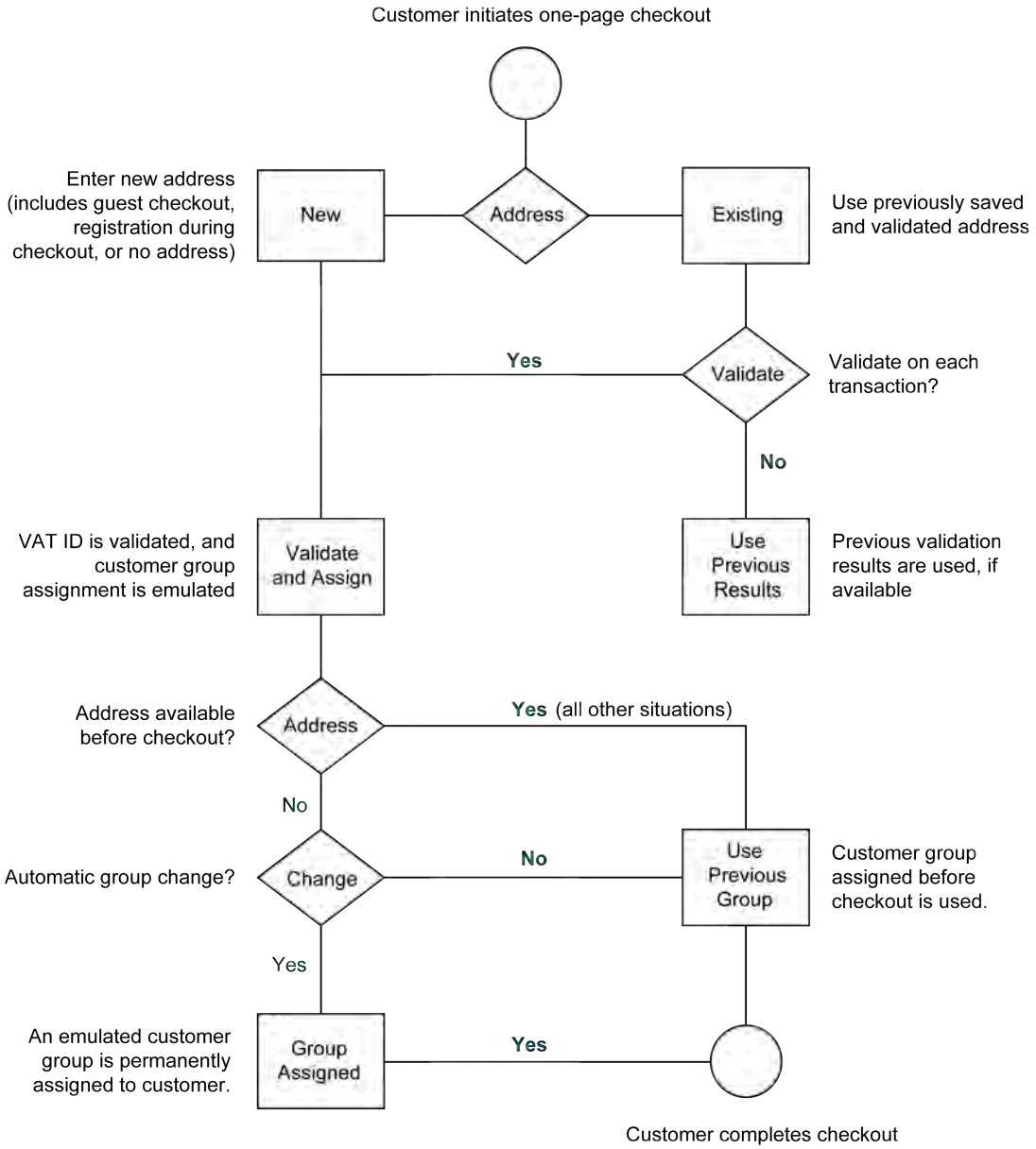
If enabled, you can override VAT ID Validation for individual customers by selecting the checkbox on the Customer Information page.

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

Configuring VAT ID Validation

The following examples show how tax classes and rates are used for VAT ID Validation. Take a look at the examples, and then follow the instructions to set up the tax classes and rules that are needed for your store.

Example: Minimal Tax Rules Required for VAT ID Validation

TAX RULE #1	
Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	Product tax classes must include a class for products of all types, except bundle and virtual.
Tax Rate	The tax rate must include the VAT rate of the merchant's country.

TAX RULE #2	
Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for products of all types, except virtual.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

TAX RULE #3 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)	
Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	A class for virtual products.
Tax Rate	VAT rate of the merchant's country.

TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)	
Customer Tax Class	A class for intra-union customers.

TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)	
Product Tax Class	A class for virtual products.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

Process Overview:

Step 1: Create VAT-Related Customer Groups

Step 2: Create VAT-Related Classes, Rates and Rules

Step 3: Enable and Configure VAT ID Validation

Step 4: Set your VAT ID and Location Country

Step 5: Verify the List of EU Member Countries

Step 1: Create VAT-Related Customer Groups

VAT ID Validation automatically assigns one of the four default customer groups to customers according to VAT ID validation results:

- Domestic
- Intra-EU
- Invalid VAT ID
- Validation error

You can create new customer groups for VAT ID Validation or use existing groups, if they comply with your business logic. When configuring VAT ID Validation, you must assign each of the created customer groups as a default for customers with appropriate VAT ID validation results.

Step 2: Create VAT-Related Classes, Rates, and Rules

Each tax rule is defined be three entities:

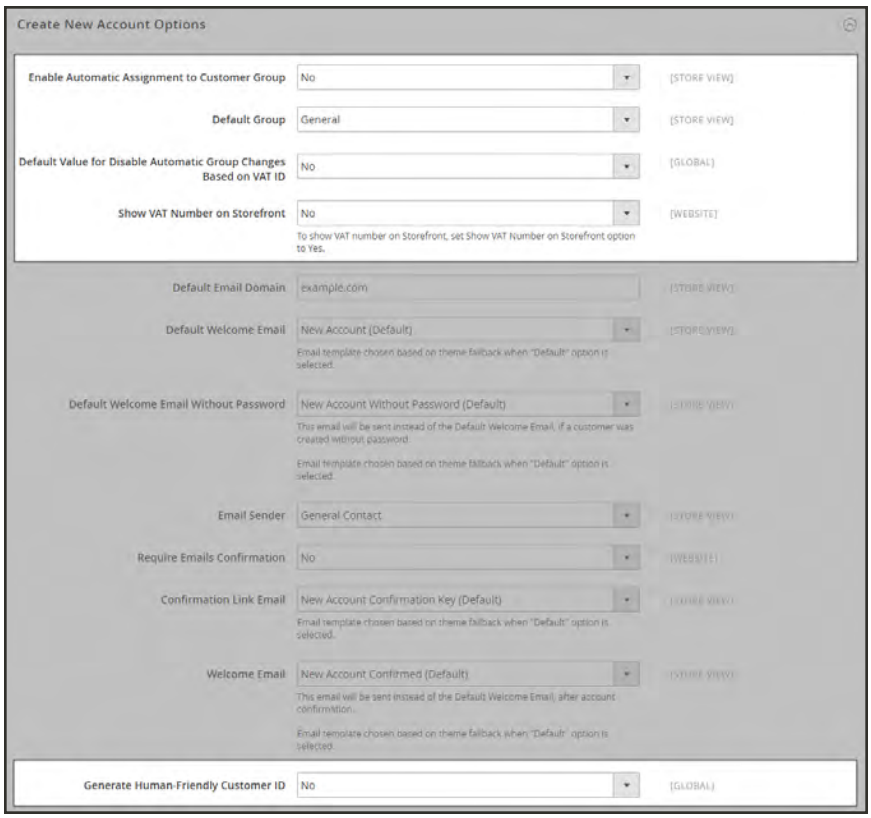
- Customer Tax Classes
- Product Tax Classes
- Tax Rates

Create the tax rules that you need to use VAT ID Validation effectively.

- Tax rules include tax rates and tax classes.
- Tax classes are assigned to customer groups.

Step 3: Enable and Configure VAT ID Validation

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If necessary, set the **Store View** for the configuration.
3. In the panel on the left under **Customers**, choose **Customer Configuration**.
4. Expand the **Create New Account Options** section.

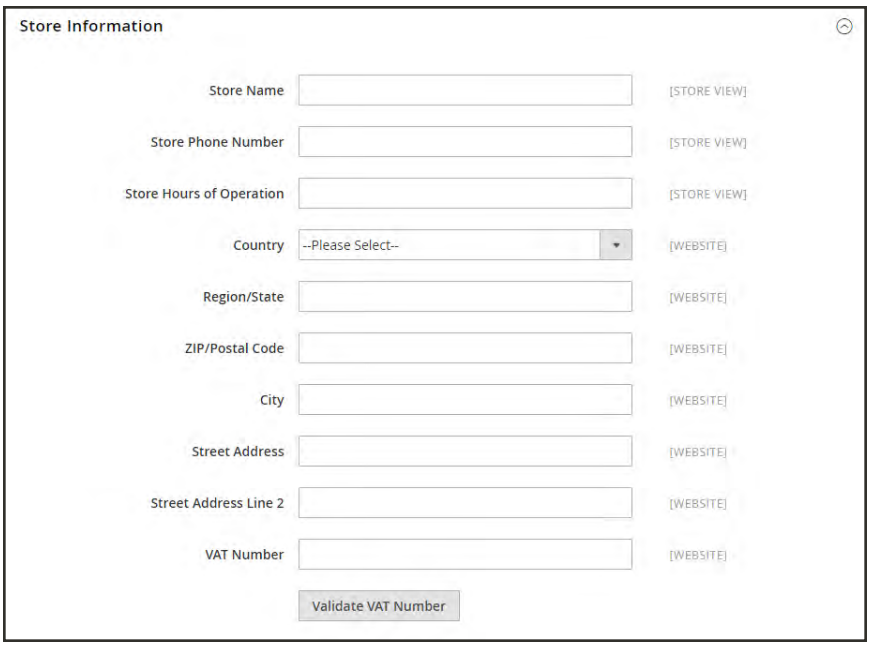


Create New Account Options

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. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If needed, set **Store View** to the applicable store view.
3. In the panel on the left under **General**, choose **General**.
4. Expand the **Store Information** section. Then, do the following:

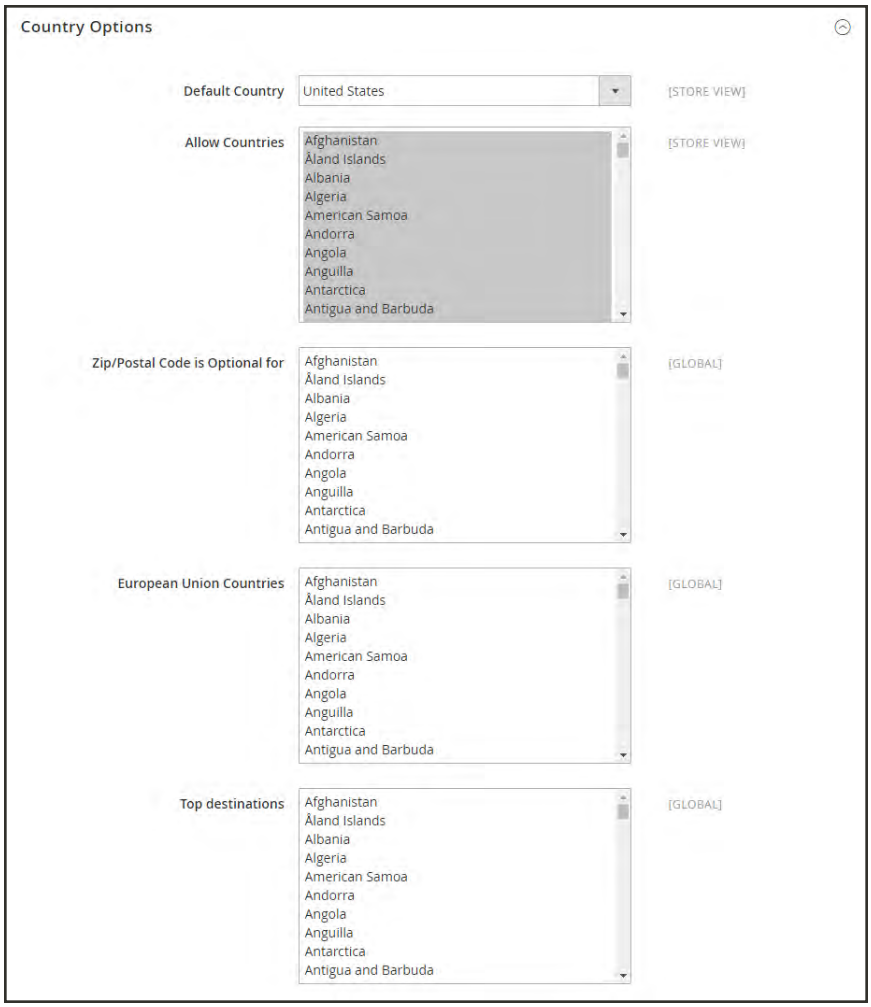


Store Information

   a. Select your **Country**.
   b. Enter your **VAT Number**. Then, tap **Validate VAT Number**. The result appears immediately.
5. When complete, tap **Save Config**.

Step 5: Verify the List of EU Member Countries

1. Continuing in the **General** configuration section, expand the **Countries Options** section.



Countries Options

2. In the list of **European Union Countries**, verify that each member country of the EU is selected.

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

Managing Customer Groups for VAT ID Validation

The customer group that is assigned to a customer according to the validation results can differ from the customer group that is currently assigned to the customer. The system presents a list of suggested groups that the administrator can either confirm or reject the current order. If the administrator confirms, the group change is emulated for the current order and the corresponding VAT rate is applied, if the corresponding tax rule is configured in the system. The actual customer group assignment for the customer does not change.

If a new customer account is added when an order is created, and the store administrator confirms the customer group that corresponds to the VAT ID validation results, the customer account is saved in the system after the order is created, and the customer group that was used to create the order is assigned to the customer.

Customer Address Workflow

When an administrator adds a new default address with a VAT ID to the account of a new or existing customer, or changes the VAT ID of the existing default address, the system validates the VAT ID and assigns the appropriate customer group to the customer. The validation takes place when the to change to the customer address is saved.

Order Creation Workflow

VAT ID validation is not initiated automatically when an order is created from the Admin. To validate the VAT ID of the customer address, an administrator must click the Validate VAT Number link in the Shipping Address or Billing Address section of the new order. When complete, the administrator receives a pop-up notification of the validation results.

Automatic Customer Group Changes

When VAT ID Validation is enabled, the group to which a customer is assigned must be changed manually from the Admin. The system automatically and permanently changes a customer group in the following situations:

- The VAT ID of the customer's default address or the whole default address changes.
- A customer group change was emulated during the checkout for a registered customer who had no previously saved address, or for a customer who registered during checkout.

Validating Customer VAT ID in New Order

To disable automatic group change for a customer:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the list, and open in **Edit** mode. Then in the panel on the left, choose **Customer Information**.
3. Just below the Group field, mark the **Disable Automatic Group Change Based on VAT ID** checkbox.
4. Tap **Save Customer**.

Disable Automatic Group Change Based on VAT ID

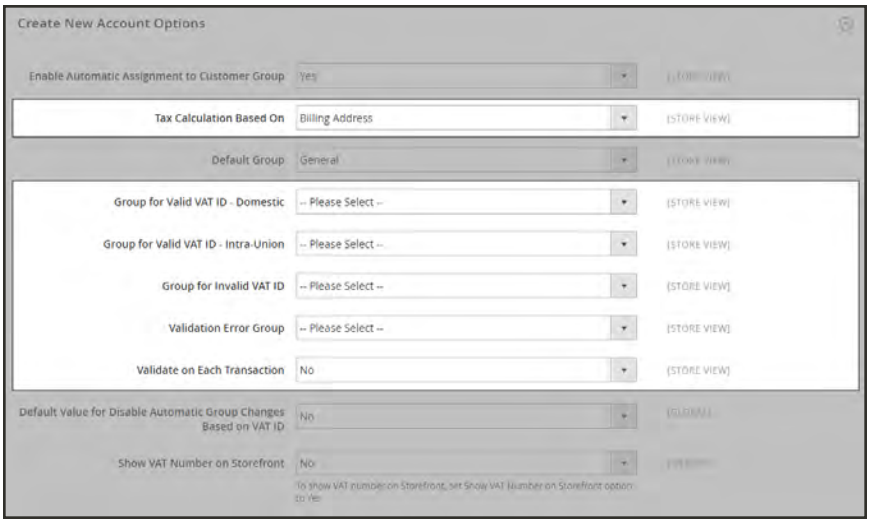
> **Important!** The setting does not influence emulated customer group changes during checkout.

To set the default automatic group change behavior:

The configuration setting is made on the global level, and applies to new customers and those whose records are available in the system when VAT ID Validation is enabled for the first time.

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.

   If Automatic Assignment to Customer Group is enabled, additional options appear that allow you to specify the customer groups that are associated with domestic and intra-union orders, as well as the behavior of automatic customer group changes based on VAT ID.



Additional Fields for Automatic Assignment of Customer Group for VAT ID Validation

4. Set **Default Value for Disable Automatic Group Changes Based on VAT ID** to one of the following:

Yes	The default value disables automatic customer group changes based on VAT ID.
No	The default value enables automatic customer group changes based on VAT ID.

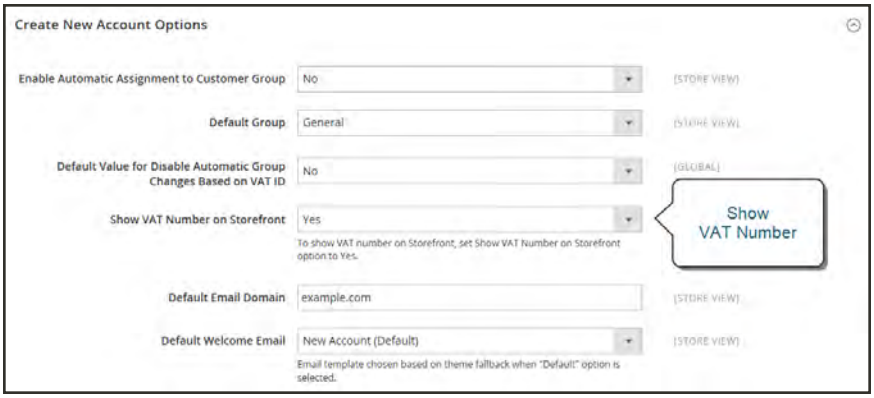
Default Value Enables Automatic Assignment of Customer Group for VAT ID Validation

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

VAT ID Attribute

The customer VAT ID value is stored in `vat_id` which is one of the customer address attributes. The default label of the attribute is "VAT number." The VAT number field is always present in all shipping and billing customer addresses when viewed from the Admin, but it not required to be visible to the customer. The field can be configured to appear in the storefront by setting the Show VAT Number in Storefront field in the Create New Account Options section of Customer Configuration.

> For customers not from EU countries, consider storing the VAT number (if any), in the existing Tax/VAT Number customer attribute to avoid any possibility of customer group change (whether persistent or emulation during checkout). It is recommended that you rename the Tax/VAT Number customer attribute to avoid confusion with the new VAT Number customer address attribute that is used for the VAT ID Validation functionality.



Show VAT Number

Tax Quick Reference

Some tax settings have a choice of options that determines the way the tax is calculated and presented to the customer. To learn more, see: International Tax Guidelines.

Tax Calculation Methods

Tax calculation method options include Unit Price, Row Total, and Total. The following table explains how rounding (to two digits) is handled for different settings.

Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Unit Price	Magento calculates the tax for each item and displays prices tax-inclusive. To calculate the tax total, Magento rounds the tax for each item, and then adds them together.
Row Total	Magento calculates the tax for each line. To calculate the tax total, Magento rounds the tax for each line item and then adds them together.
Total	Magento calculates the tax for each item and adds those tax values to calculate the total unrounded tax amount for the order. Magento then applies the specified rounding mode to the total tax to determine the total tax for the order.

Catalog Prices With or Without Tax

The possible display fields vary depending on the calculation method and whether the catalog prices include or exclude taxes. Display fields have two-decimal precision in normal computations. Some combinations of price settings display prices that both include and exclude tax. When both appear on the same line item, it can be confusing to customers, and triggers a warning.

Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Excluding Tax	Using this setting, the base item price is used as it is entered and the tax calculation methods are applied.
Including Tax	Using this setting, the base item price excluding tax is calculated first. This value is used as the base price, and the tax calculation methods are applied.

Important! Changes have been made from earlier versions for EU merchants or other VAT merchants who display prices including tax and operate in several countries with multiple store views. If you load prices with more than two digits of precision, Magento automatically rounds all prices to two digits to ensure that a consistent price is presented to buyers.

Shipping Prices With or Without Tax

Tax Configuration Options

SETTING	DISPLAY	CALCULATION
Excluding Tax	Appears without tax.	Normal calculation. Shipping is added to cart total, typically displayed as a separate item.
Including Tax	Can be tax inclusive, or tax can be displayed separately.	Shipping is treated as another item in cart with taxes, using the same calculations.

Tax Amounts as Line Items

To display two different tax amounts as separate line items, such as GST and PST for Canadian stores, you must set different priorities for the related tax rules. However, in previous tax calculations, taxes with different priorities would automatically be compounded. To correctly display separate tax amounts without an incorrect compounding of the tax amounts, you can set different priorities, and also select the Calculate off subtotal only checkbox. This produces correctly calculated tax amounts that appear as separate line items.

International Tax Guidelines

U.S. Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	No, because FPT is not taxed.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	No
Apply Discount	Before tax
Comment	All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.

U.K. B2C Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For merchants marking up supplier invoices (including VAT).

U.K. B2B Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description

U.K. B2B Tax Configuration (cont.)

TAX OPTION	RECOMMENDED SETTING
Tax based on	Shipping address
Tax Calculation	On item
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For B2B merchants to provide simpler VAT supply chain considerations. Tax calculation on row is also valid; however, check with your taxing jurisdiction. Setup assumes a merchant is in the supply chain and that goods sold are used by other vendors for VAT rebates and so on. This makes it easy to discern tax by item for faster rebate generation. Note that some jurisdictions require different rounding strategies not currently supported by Magento, and that not all jurisdictions allow item or row level tax.

Canada Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT, description, and apply tax to FPT.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax
Comment	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

U.S. Tax Configuration Guidelines

Tax Classes

TAX CLASS	RECOMMENDED SETTING
Tax Class for Shipping	None

Calculation Settings

CALCULATION	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Origin
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax

Default Tax Destination Calculation

SETTING	RECOMMENDED SETTING
Default Country	United States
Default State	State where business is located.
Default Post Code	The postal code that is used in your tax zones.

Price Display Settings

SETTING	RECOMMENDED SETTING
Display Product Prices in Catalog	Excluding Tax
Display Shipping Prices	Excluding Tax

Shopping Cart Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax

SETTING	RECOMMENDED SETTING
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Display Gift Wrapping Prices	Excluding Tax
Display Printed Card Prices	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

Orders, Invoices, Credit Memos, Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

Fixed Product Taxes

SETTING	RECOMMENDED SETTING
Enable FPT	No, except in California.

Canadian Tax Guidelines

The following example shows how to set up GST tax rates for Canada and PST tax rates for Saskatchewan, with tax rules that calculate and display the two tax rates. Because this is an example configuration, be sure to verify the correct tax rates and rules for your tax jurisdictions. When setting up taxes, set the store scope to apply the configuration to all applicable stores and websites.

- Fixed product tax is included for relevant goods as a product attribute.
- In Quebec, PST is referred to as TVQ. If you need to set up a rate for Quebec, make sure to use TVQ as the identifier.

Process Overview:

Step 1: Complete the Tax Calculation Settings

Step 2: Set Up Canadian Goods & Services Tax (GST)

Step 3: Set Up Canadian Provincial Sales Tax (PST)

Step 4: Create a GST Tax Rule

Step 5: Create a PST Tax Rule for Saskatchewan

Step 6: Save and Test the Results

Step 1: Complete Tax Calculation Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand each section, and complete the following settings:

Tax Calculation Settings

FIELD	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax

Tax Calculation Settings (cont.)

FIELD	RECOMMENDED SETTING
Apply Tax On	Custom Price (if available)

Tax Classes

FIELD	RECOMMENDED SETTING
Tax Class for Shipping	Shipping (shipping is taxed)

Default Tax Destination Calculation

FIELD	RECOMMENDED SETTING
Default Country	Canada
Default State	(as appropriate)
Default Postal Code	* (asterisk)

Shopping Cart Display Settings

FIELD	RECOMMENDED SETTING
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero in Tax Subtotal	Yes

Fixed Product Taxes

FIELD	RECOMMENDED SETTING
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	No

Step 2: Set Up Canadian Goods & Services Tax (GST)

To print the GST number on invoices and other sales documents, include it in the name of the applicable tax rates. The GST will appear as part of the GST amount on any order summary.

Manage Tax Zones & Rates

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-GST
Country	Canada
State	* (asterisk)
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

Step 3: Set Up Canadian Provincial Sales Tax (PST)

Set up another tax rate for the applicable province.

Tax Rate Information

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-SK-PST
Country	Canada
State	Saskatchewan
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

Step 4: Create a GST Tax Rule

To avoid compounding the tax and to correctly display the calculated tax as separate line items for GST and PST, you must set different priorities for each rule, and select the “Calculate off subtotal only” checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-GST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-GST
Priority	0
Calculate off subtotal only	Select this checkbox.
Sort Order	0

Step 5: Create a PST Tax Rule for Saskatchewan

For this tax rule, make sure to set the priority to 0 and select the "Calculate off subtotal only" checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-PST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-SK-PT
Priority	1

Tax Rule Information (cont.)

FIELD	RECOMMENDED SETTING
Calculate off subtotal only	Select this checkbox.
Sort Order	0

Step 6: Save and Test the Results

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

For reporting of digital goods, see: EU Place of Supply.

Process Overview:

Step 1: Create Three Product Tax Classes

Step 2: Create Tax Rates for France and Germany

Step 3: Set Up the Tax Rules

Step 4: Set Up a Store View for Germany

Step 5: Configure Tax Settings for France

Step 6: Configure Tax Settings for Germany

Step 1: Create Three Product Tax Classes

For this example, it is assumed that multiple VAT-Reduced product tax classes are not needed.

1. Create a VAT-Standard product tax class.
2. Create a VAT-Reduced product tax class.
3. Create a VAT-Free product tax class.

Step 2: Create Tax Rates for France and Germany

Create the following tax rates:

Tax Rates

TAX RATE	SETTING	
France-StandardVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	20%
France-ReducedVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	5%
Germany-StandardVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	19%
Germany-ReducedVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	7%

Step 3: Set Up the Tax Rules

Create the following tax rules:

Tax Rules

TAX RULE	SETTING	
Retail-France-StandardVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Standard
	Tax Rate:	France-StandardVAT
	Priority:	0
	Sort Order:	0
Retail-France-ReducedVAT	Customer Class:	Retail Customer
	Tax Class:	VAT Reduced
	Tax Rate:	France-ReducedVAT
	Priority:	0
	Sort Order:	0
Retail-Germany-StandardVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Standard
	Tax Rate:	Germany-StandardVAT
	Priority:	0
	Sort Order:	0
Retail-Germany-ReducedVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Reduced
	Tax Rate:	Germany-ReducedVAT
	Priority:	0
	Sort Order:	0

Step 4: Set Up a Store View for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Under the default website, create a store view for **Germany**. Then, do the following:
   a. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
   b. In the upper-left corner, set **Default Config** to the French store.
   c. On the General page, expand the **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

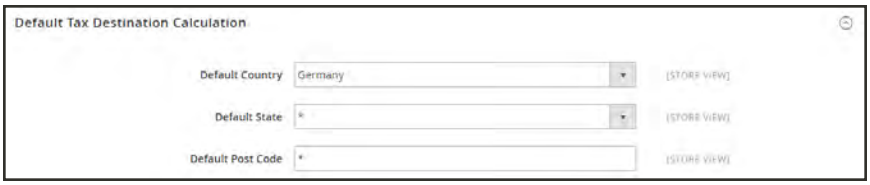
FIELD	RECOMMENDED SETTING
Tax Class for Shipping	Shipping (shipping is taxed)
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Including Tax
Shipping Prices	Including Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Including Tax
Apply Tax On	Custom Price (if available)
Default Country	France

General Settings (cont.)

FIELD	RECOMMENDED SETTING
Default State	
Default Postal Code	* (asterisk)
Include Tax in Grand Total	Yes
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	Yes

Step 6: Configure Tax Settings for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**,choose **Tax**. Then, do the following:
   a. In the upper-right corner, choose the German **Store View**.
   b. To the right of the Default Country field, clear the **Use Website** checkbox. Then, set **Default Country** to "Germany."



Default Tax Destination Calculation

   c. To the right of the Default State field, clear the **Use Website** checkbox. Then, set **Default State** to "*."
   d. To the right of the Default Post Code field, mark the **Use Website** checkbox. Then in the **Default Post Code** field, enter an asterisk "*." as a wildcard.
3. 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).

Warning. Tax configuration can result in rounding errors for store(s): Europe Websites (French), Europe Websites (German).

Calculation Settings

Use the following tables for reference when configuring tax calculation settings:

Tax Calculation Method Based On: Excluding Tax

Tax Excluded

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Tax Class for Shipping	Shipping (is taxed)		
Excluding tax	OK	OK	OK
Including tax*	OK	OK	OK
Including and Excluding tax	OK	OK	**Warning**

* If engaged in cross border trade and catalog price includes tax, make sure to set Enable Cross Border Trade to “Yes.”

Catalog Prices: Including Tax

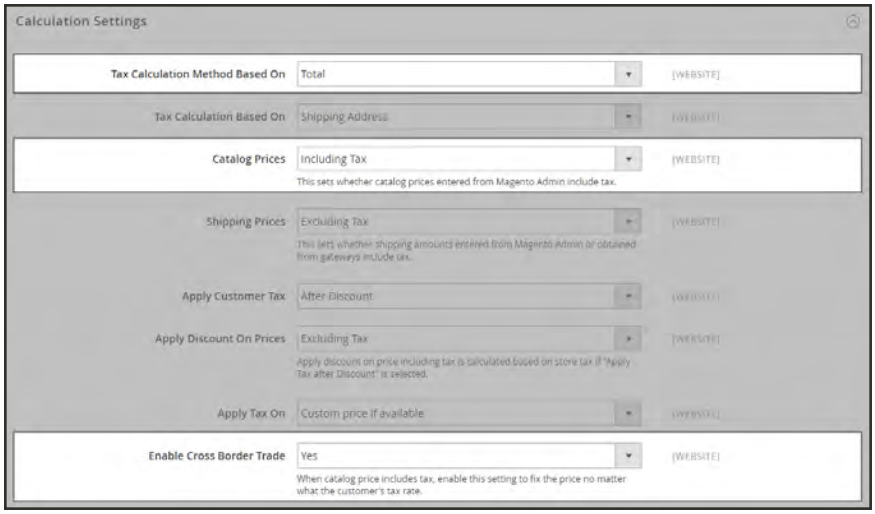
Tax Included

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Excluding tax	OK	OK	OK

Tax Included (cont.)

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Including tax*	OK	OK	OK
Including and Excluding tax	OK	**Warning**	**Warning**

* If engaged in cross border trade and catalog price includes tax, make sure to set Enable Cross Border Trade to “Yes.”



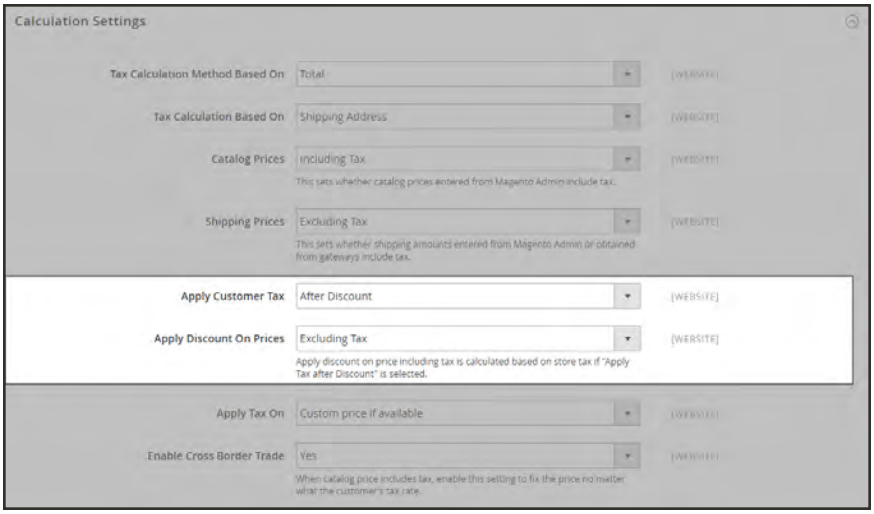
Calculation Settings - Catalog Prices Include Tax

Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

Recommended Settings

FIELD	RECOMMENDED SETTING	
Apply Customer Tax	After Discount	
Apply Discount on Prices	US and Canada	Excluding Tax
	EU	Including Tax



Calculation Settings - Apply Customer Tax After Discount

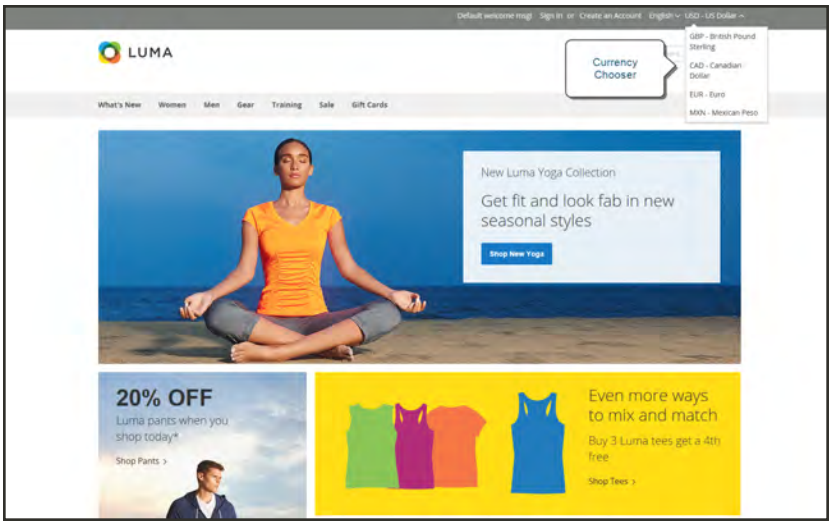
CHAPTER 76:

Currency

Magento Enterprise Edition 2.0 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.

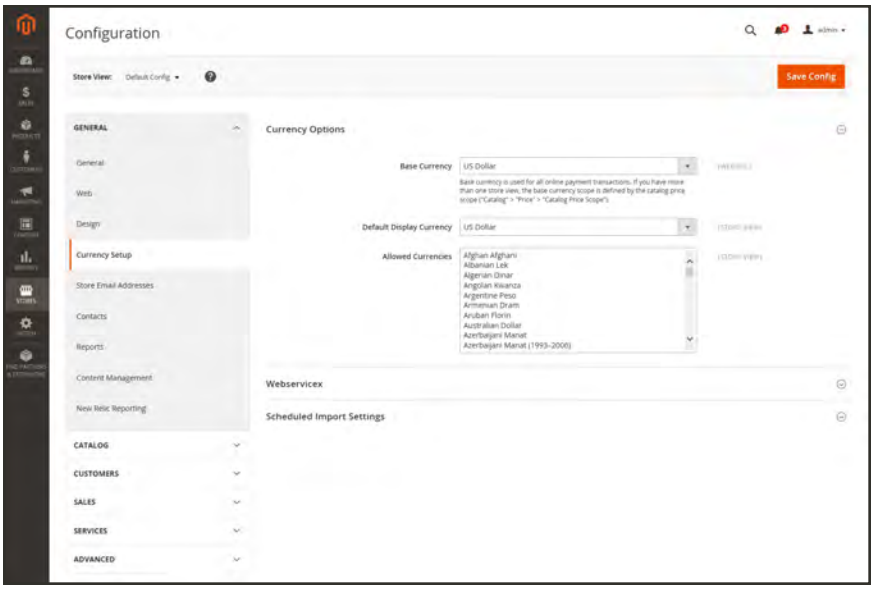
Currency symbols appear in product prices and sales documents such as orders and invoices. You can customize the currency symbols as needed, and also set the display of the price separately for each store or view.



Currency Chooser

Currency Configuration

Before setting up individual currency rates, specify which currencies you accept, and the currency that you want to use to display prices in your store.



Currency Setup

Process Overview:

Step 1: Choose the Accepted Currencies

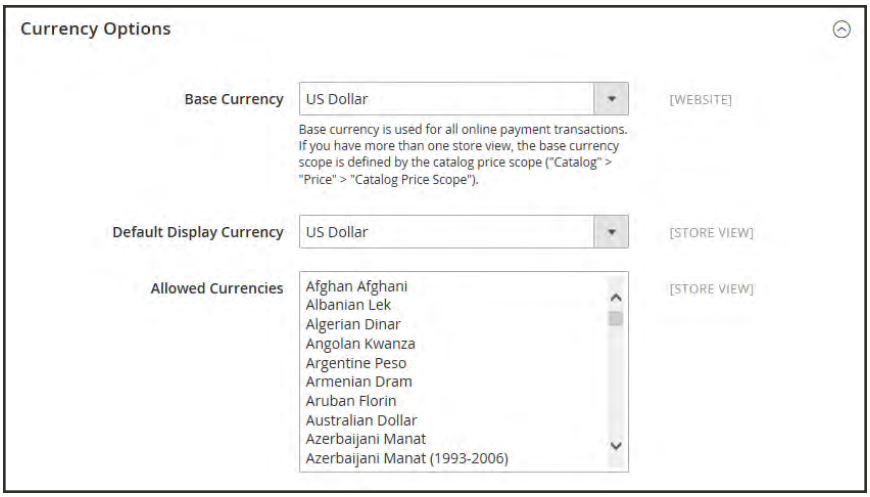
Step 2: Configure the Import Connection

Step 3: Configure the Scheduled Import Settings

Step 4: Update the Currency Rates

Step 1: Choose the Accepted Currencies

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Currency Setup**.
3. Expand the **Currency Options** section, and do the following:
   a. Set **Base Currency** to the primary currency that you use for online transactions.
   b. Set **Default Display Currency** to the currency used to display pricing in your store.
   c. In the **Allowed Currencies** list, select all currencies that you accept as payment in your store. Make sure to also select your primary currency. (For multiple currencies, hold down the Ctrl key and select each option.)



Currency Options

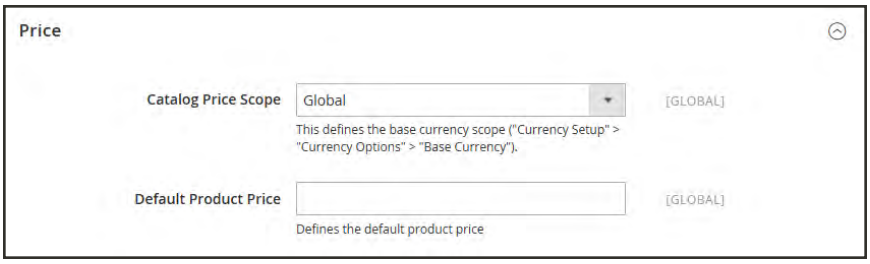
4. When prompted to refresh the cache, tap the **Close** box in the upper-right corner of the system message. We'll refresh the cache later.

5. To define the scope of the base currency, do the following:

   a. In the panel on the left under **Catalog**, choose **Catalog**.

   b. Scroll down and expand the **Price** section.

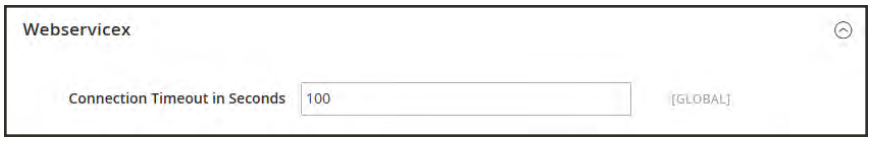
   c. Set **Catalog Price Scope** to either "Global" or "Website."



Price

Step 2: Configure the Import Connection

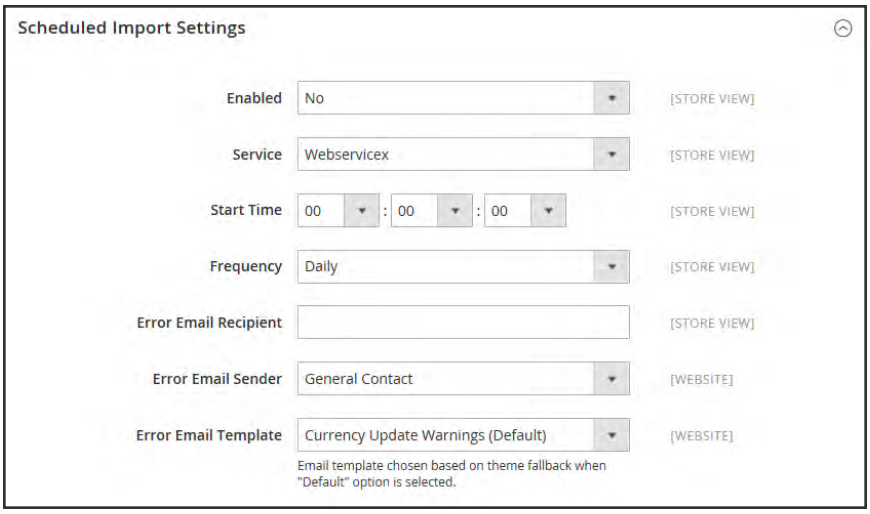
1. Scroll back up to the top of the page. In the panel on the left under **General**, choose **Currency Setup**.
2. Expand the **WebserviceX** section.
3. In the **Connection Timeout in Seconds** field, enter the number of seconds of inactivity to allow before the connection times out.



WebserviceX

Step 3: Configure the Scheduled Import Settings

1. Continuing with Currency Setup, expand the **Scheduled Import Settings** section.
2. To automatically update currency rates, set **Enabled** to "Yes." Then, do the following:
   a. Set **Service** to the rate provider. The default value is “Webservicex.”
   b. Set **Start Time** to the hour, minute, and second that the rates will be updated according to the schedule.
   c. To determine how often the rates are updated, set **Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthy
   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.



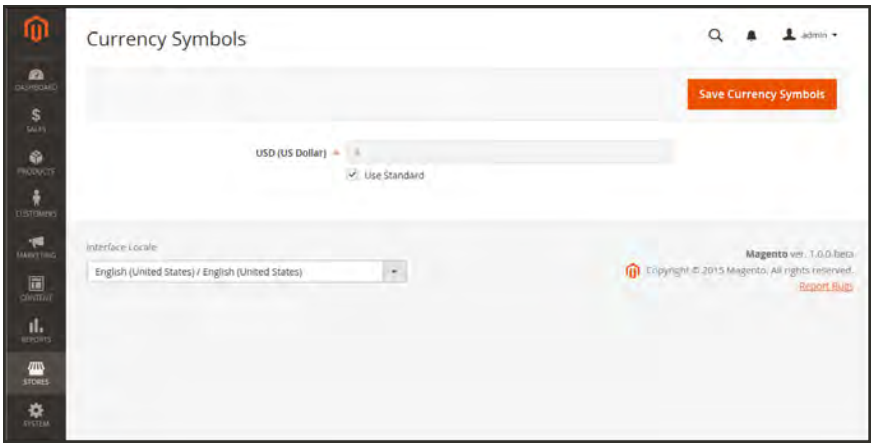
Scheduled Import Settings

Step 4: Update the Currency Rates

The currency rates must be updated with the current values before they go into effect. Follow the instructions to update the rates manually or to import the rates automatically.

Currency Symbols

Manage Currency Symbols gives you the ability to customize the symbol associated with each currency that is accepted as payment in your store.



Currency Symbols

To customize currency symbols:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Symbols**.

   Each currency that is currently enabled for your store appears in the Currency list.

2. Enter a custom symbol for each currency you want to use, or mark the **Use Standard** checkbox to the right of each currency.

3. To override the default symbol, clear the **Use Standard** checkbox. Then, enter the symbol that you want to use.

   > It is not possible to change the alignment of the currency symbol from left to right.

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

5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh any invalid cache.

Refresh Cache

Updating Currency Rates

Currency rates can be set manually, or imported into the store. To ensure that your store has the most current rates, you can configure the currency rates to be updated automatically on schedule.Before importing currency rates, complete the Currency Rate Setup to specify the currencies that you accept, and to establish the import connection and schedule.

Updating Currency Rates

To manually update a currency rate:

1. On the Admin sidebar, click **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Tap the rate you want to change, and enter the new value for each currency supported.
3. When complete, tap **Save Currency Rates**.

To import currency rates:

1. On the Admin sidebar, tap **Stores**. Then under Currency, choose **Currency Rates**.
2. Set **Import Service** to the currency rate provider. WebserviceX is the default provider.
3. Tap **Import**.

   The updated rates appear in the Currency Rates list. If the rates have changed since the last update, the old rate appears below for reference.
4. When complete, tap **Save Currency Rates**.
5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh all invalid caches.

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 77:

Attributes

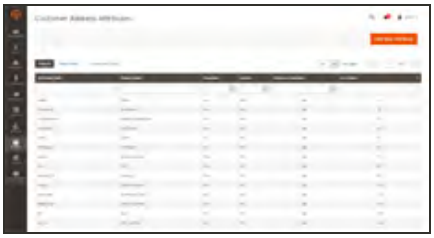
Magento uses attributes to manage the information associated with products, customers, and product ratings. Attributes are pieces of information that might appear as fields in forms, reports, product reviews, layered navigation, and email messages. Some attributes are built into the system, and others can be created to address specific needs.

You can find more information about attributes in the Products and Data Transfer sections of this guide.

Attribute Types

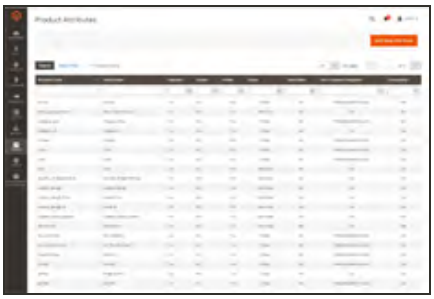
Customer

Customer attributes include fields that make up the name, the email address and other identifiers, including the customer group, date of birth, gender, and VATID.



Customer Address

Customer address attributes include the fields that make up the full shipping and billing addresses, telephone and fax numbers, and VAT ID.



Product

Product attributes include the price, weight, color, size, images, URL key, and numerous other pieces of information that make up the product record.

Returns

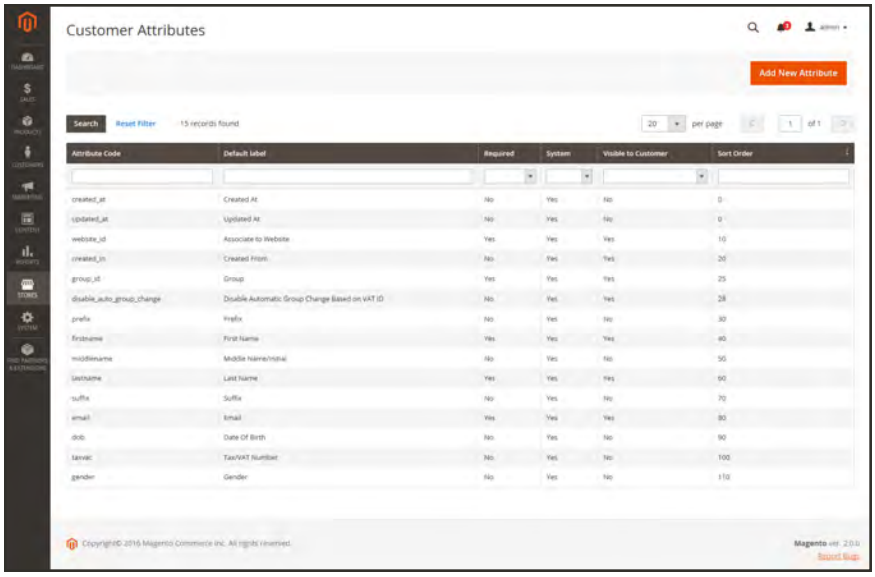
Returns attributes contain the information that is needed during the product return process..

Ratings

Ratings attributes are the qualities of a product that customers can assign from one to five stars when reviewing a product.

Customer Attributes

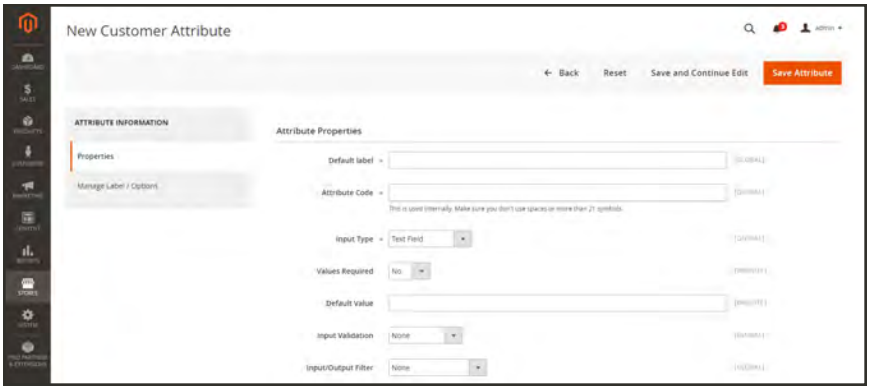
Magento's customer attributes provide the information required to support the order, fulfillment, and customer management processes. Because your business is unique, you might need fields in addition to those provided by the system. You can add custom attributes to the Account Information, Address Book, and Billing Information sections of the customer's account. Customer address attributes can also be used in the Billing Information section during checkout, or when guests register for an account.



Customer Attributes

Step 1: Complete the Attribute Properties

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Customer**.



Customer Attribute Properties

2. In the **Attribute Properties** section, do the following:
   a. Enter a **Default Label** to identify the attribute during data entry.
   b. Enter an **Attribute Code** to identify the attribute within the system.

   The attribute code must begin with a letter, and can include any combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length, and cannot include special characters or spaces. The underscore character (_) can be used to indicate a space.

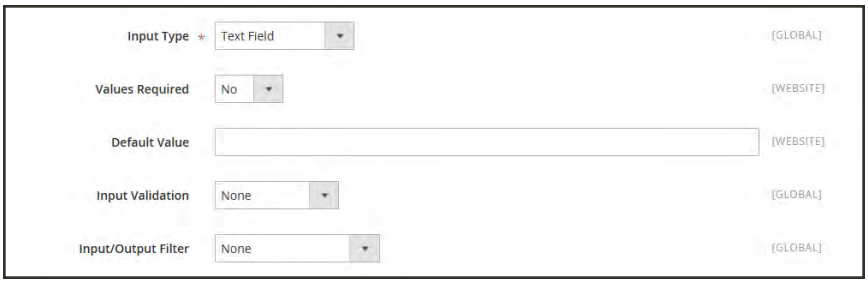
   > **Shortcut:** To complete only the required fields at this time, scroll down to Storefront Properties, enter the Sort Order, and save.

3. Complete the following:

Data Entry Properties

1. To determine the type of input control that is used for data entry, set **Input Type** to one of the following:
2. If the customer must enter a value in the field, set **Values Required** to "Yes."
3. Enter a **Default Value** to assign an initial value to the field.
4. To check the data entered into the field for accuracy before saving the record, set **Input Validation** to the type of data that should be entered into the field.
5. To limit the size of Text Field and Text Area input types, enter the **Minimum Text Length** and **Maximum Text Length**.
6. To apply a filter to a Text Field, Text Area, or Multiple Line input type, set **Input/Output Filter** to one of the following:

None	Does not apply a filter to text entered into the field.
Strip HTML Tags	Removes HTML tags from the text. This filter can help clean up data that is pasted into a field from another source that includes HTML tags.
Escape HTML Entities	Converts special characters found in the text to a valid HTML escape sequence, such as `&`. .Escape sequences are enclosed between an ampersand and a semi-colon, and are frequently used for typographer's smart quotes, copyright and trademark symbols. Escape sequences are also used to identify characters such as the less than (<) and greater than (>) symbols, and the ampersand character which are also used in the code. This filter can help clean up special characters that are sometimes pasted into database fields from word processors.



Data Entry Properties

Customers Grid Properties

1. To be able to include the column in the Customers grid, set **Add to Column Options** to "Yes."
2. To filter the Customers grid by this attribute, set **Use in Filter Options** to "Yes."
3. To search the Customers grid by this attribute, set **Use in Search Options** to "Yes."
4. To make this attribute available to customer segments, set **Use in Customer Segment** to "Yes."

Step 2: Complete the Storefront Properties

1. To make the attribute visible to customers, set **Show on Storefront** to "Yes."
2. Enter a number in the **Sort Order** field to determine its order of appearance when listed with other attributes.
3. Set **Forms to Use** to each form that is to include the attribute. To choose multiple options, hold the Ctrl key down and click each form.
   - Customer Registration
   - Customer Account Edit
   - Admin Checkout

Storefront Properties

Step 3: Complete the Labels/Options

1. In the panel on the left, choose **Manage Labels/Options**.
2. Under **Manage Titles**, enter a label to identify the attribute for each store view.
3. When complete, tap **Save Attribute**.

Manage Labels/Options

Default Customer Attributes

ATTRIBUTE CODE	DESCRIPTION
`created_at`	The date the customer account was created.
`updated_at`	The date the customer account was last updated.
`website_id`	The website ID of the site where the customer account was created.
`created_in`	The store view where the account was created.
`group_id`	The ID of the customer group where the customer is assigned.
`disable_auto_group_change`	Determines if customer groups can be dynamically assigned during VAT ID validation.
`prefix`	Any prefix that is used with the customer name.(Mr., Ms., Mrs., Dr., etc.)
`firstname`	The first name of the customer.
`middlename`	The middle name or middle initial of the customer.

Default Customer Attributes (cont.)

ATTRIBUTE CODE	DESCRIPTION
`lastname`	The last name of the customer.
`suffix`	Any suffix that is used with the customer name. (Jr., Sr., Esquire, etc.)
`email`	The customer's email address.
`dob`	The customer's date of birth.
`taxvat`	The Value Added Tax (VAT) ID that is assigned to the customer. The default label of this attribute is "VAT Number.". The VAT number field is always present in all shipping and billing customer addresses when viewed from the Admin, but is not a required field.
`gender`	The customer gender.

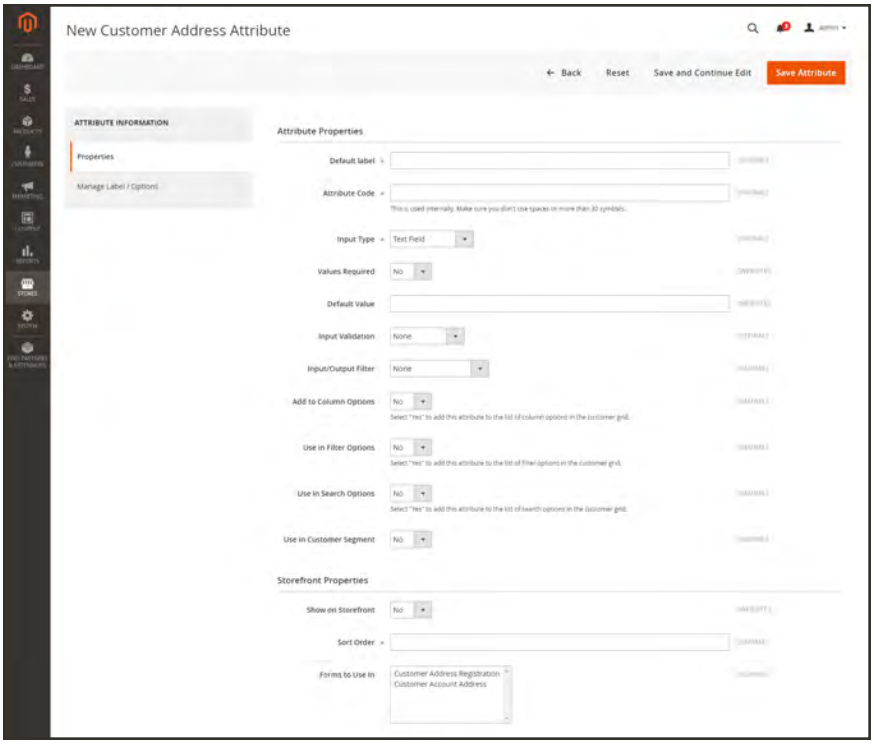
Customer Address Attributes

Custom address attributes can be set up if you need to provide additional information such as an optional email address, Skype account, alternate phone number, building, or county. The custom attribute can then be incorporated into the address template that is used to produce sales documents.The process to create a custom address attribute is almost the same as creating a customer attribute. Customer address attributes can be used in the following forms:

- Customer Registration
- Address Book
- Customer Billing and Shipping Address

To create a new customer address attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Customer Address**.
2. In the upper-right corner, tap **Add New Rating**.
3. Follow the same process as you would to create a customer attribute.



New Customer Address Attribute Properties

Customer Address Templates

You can modify the template that controls the format of customer billing and shipping addresses that appear on printed invoices, shipments, and refunds, as well as in the addresses book of the customer account. If you need to include additional information, you can create custom attributes that are associated with the customer account and address, and incorporate them into the template.

Example 1: Short Format

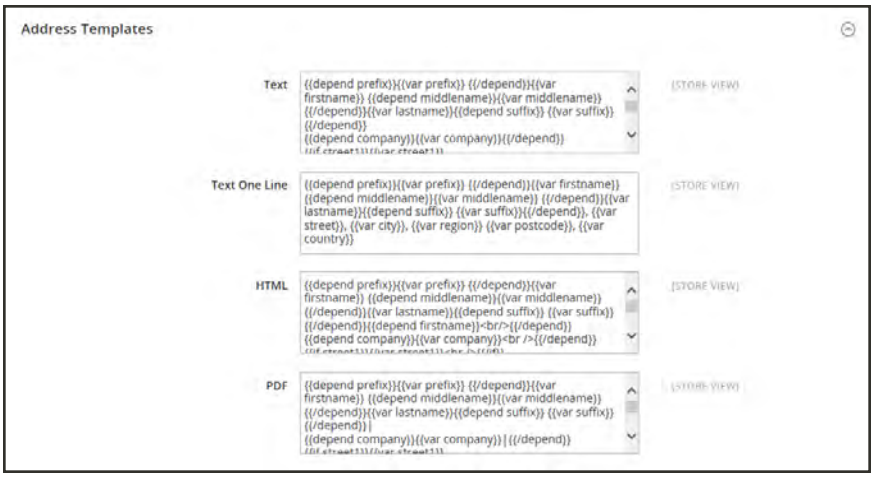
For Text One Line Template

```
{{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}}
{{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}
{{depend suffix}} {{var suffix}}{{/depend}}, {{var street}}, {{var
city}}, {{var region}} {{var postcode}}, {{var country}}
```

Example 2: Long Format

For Text, HTML, and PDF Address Templates

```
{{depend prefix}}{{var prefix}} {{/depend}}{{var firstname}}
{{depend middlename}}{{var middlename}} {{/depend}}{{var lastname}}
{{depend suffix}} {{var suffix}}{{/depend}}{{depend firstname}}<br/>
{{/depend}}

{{depend company}}{{var company}}<br />{{/depend}}

{{if street1}}{{var street1}}<br />{{/if}}

{{depend street2}}{{var street2}}<br />{{/depend}}

{{depend street3}}{{var street3}}<br />{{/depend}}

{{depend street4}}{{var street4}}<br />{{/depend}}

{{if city}}{{var city}},  {{/if}}{{if region}}{{var region}},
{{/if}}{{if postcode}}{{var postcode}}{{/if}}<br/>

{{var country}}<br/>

{{depend telephone}}T: {{var telephone}}{{/depend}}

{{depend fax}}<br/>F: {{var fax}}{{/depend}}

{{depend vat_id}}<br/>VAT: {{var vat_id}}{{/depend}}
```



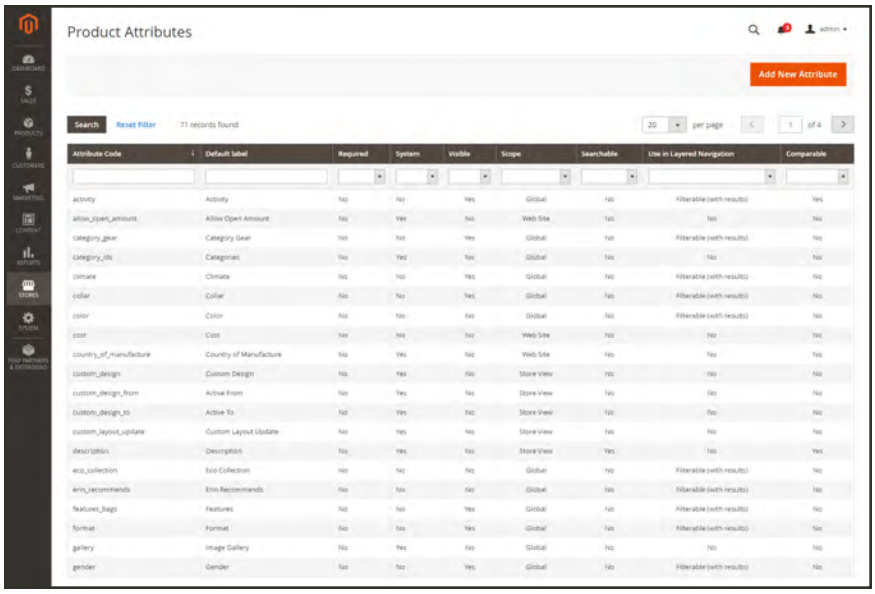
Address Templates

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, and its appearance and behavior in the store. The Attribute Information panel on the left includes:



Product Attributes

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.

Properties

Property Descriptions

PROPERTY	DESCRIPTION	
ATTRIBUTE PROPERTIES		
Default Label	The label that identifies the attribute during data entry.	
Catalog Input Type for Store Owner	Determines the data type and input control that is used to manage the product from the store Admin. Options include:	
	Text Field	A single line input field for text.
	Text Area	A multiple-line input field that can display paragraphs of text formatted with HTML.
	Date	An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.
	Yes/No	A drop-down list with pre-defined options of “Yes” and “No.”
	Multiple Select	A drop-down list of options that allows multiple selections. To select more than one option, hold down the Ctrl key and click each item.
	Dropdown	A drop-down list of options that allows only one selection.
	Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.
	Media Image	An additional image that can be included in the attribute set of a product.
	Visual Swatch	An uploaded image that represents a configurable product option for color, material, texture, or pattern.
	Text Swatch	A text-based representation of a configurable product option that is

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	frequently used for size. Text swatches can also be used to represent hexadecimal color values. Fixed Product Tax — An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Values Required	To require that a value to be entered in this field before the record can be saved, set Values Required to “Yes.” Options include: Yes / No
ADVANCED ATTRIBUTE PROPERTIES	
Attribute Code	(Required) A unique identifier for internal use. The Attribute Code must begin with a letter, but can include a combination of lowercase letters (a-z) and numbers (0-9).The code must be less than thirty characters in length and cannot include any special characters or spaces, although an underscore (_) can be used to indicate a space.
Scope	Limits the use of an attribute to a specific store view or website. Options include: Store View Website Global
Default Value	Assigns a starting value to the attribute to help during data entry. To assign a default value for Multiple Select or Dropdown input types, see: Creating Attributes. A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.
Unique Value	To prevent duplicate values in a data entry field, set Unique Value to “Yes.” Options include: Yes / No
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options:

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	None Decimal Number Integer Number Email URL Letters Letters (a-z, A-Z) or Numbers (0-9)
Add to Column Options	Determines if the column appears in the product grid. Options: Yes / No
Use in Filter Options	Determines if the attribute is used as a filter control at the top of columns in the grid. Options: Yes / No

Storefront Properties

Property Descriptions

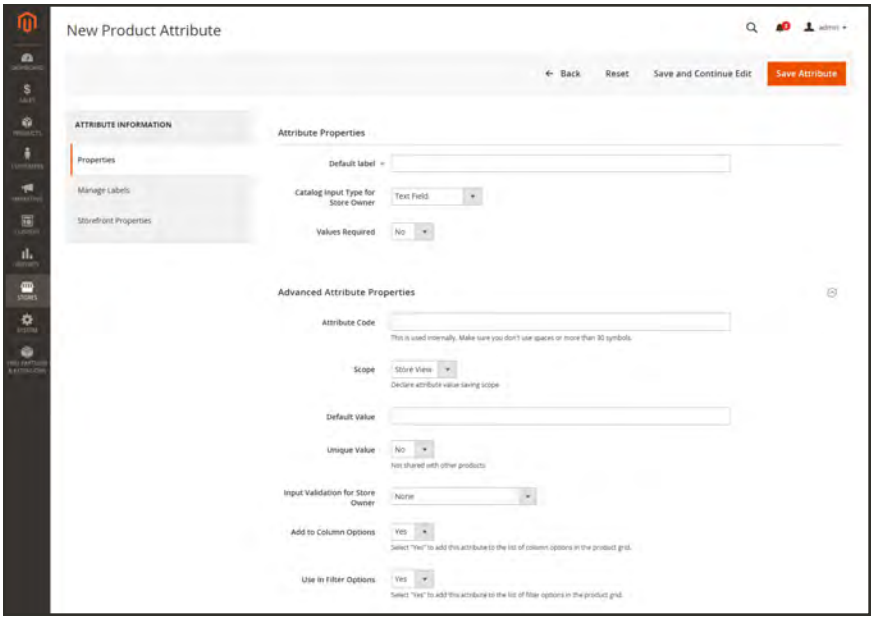
PROPERTY	DESCRIPTION
Use in Search	Select “Yes” if you want people to be able to search the catalog based on the value of this attribute. Options include: Yes / No The following attributes appear when Search is enabled: Search Weight — To weight the search results, set Search Weight to a number from 1 to 5. Visible in Advanced Search — Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No 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.)

PROPERTY	DESCRIPTION	
	No	The attribute is not used in layered navigation.
	Filterable (with results)	Lists only products that match the filter value.
	Filterable (no results)	Lists all attribute values, even those that do not apply to any product in the list. Layered navigation appears on a category page only if there are filterable attributes available.
Use In Search Results Layered Navigation	To include the attribute in the layered navigation for search results, select “Yes.” Options include: Yes / No	
Position	Determines the position of the attribute in layered navigation in relation to other filterable attributes.	
Use for Promo Rule Conditions	To make the attribute available for use in price rules, select “Yes.” Options include: Yes / No	
Allow HTML Tags on Storefront	(Text Field and Text Area input types only) To be able to format the attribute value with HTML tags, select “Yes.” Options include: Yes / No	
Visible on Catalog Pages on Storefront	(Simple and virtual products only) To include the attribute on the Additional Information tab of the product page, select “Yes.” Options include: Yes / No	
Used in Product Listing	Depends on the theme. To include the attribute in product summaries that appear in catalog listings, select “Yes.”	
Used for Sorting in Product Listing	Depending on theme, includes the attribute as a “Sort By” option for catalog listings. Options: Yes / No	

Creating Product Attributes

Attributes can be created while working on a product, or from the Product Attributes page. The following example shows how to create attributes from the Stores menu. To learn how to add attributes while working on a product, see: Using Product Attributes.



New Product Attribute

Process Overview:

Step 1: Describe the Basic Properties

Step 2: Describe the Advanced Properties

Step 3: Enter the Field Label

Step 4: Describe the Frontend Properties

Step 1: Describe the Basic Properties

1. On the Admin sidebar, tap **Stores**. Then under Attributes, choose **Product**.
2. Tap **Add New Attribute**.
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 tp be used for data entry.

   For Dropdown and Multiple Select input types, do the following:

   a. Under **Manage Options**, tap **Add Option**.

   b. Enter the first option that you want to appear in the list. You can enter one option for the Admin, and a translation for each store view. If you have only one store view, you can enter only the Admin value and it will be used for both.

   c. Tap **Add Option** and repeat the previous step for each option that you want to include in the list.

   d. Mark the **Is Default** checkbox for the option to be used as the default.

Manage Options

5. If you want to require a value to be entered before the product can be saved, set **Values Required** to "Yes."

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 applicable, enter a **Default Value** for the attribute.
4. If you want to prevent duplicate values from being entered, set **Unique Value** to "Yes."
5. 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. The test can validate the entry as any of the following:

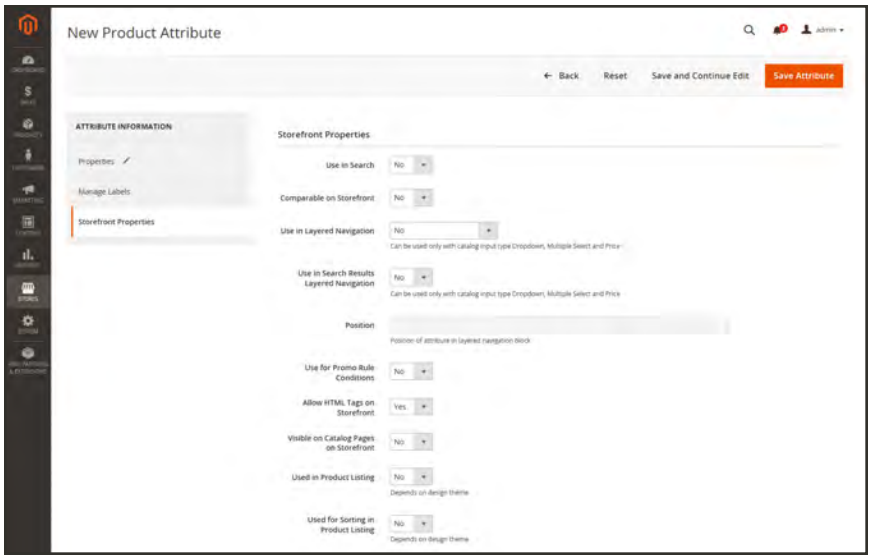
- Decimal Number
- Integer Number
- Email
- URL
- Letters
- Letters (a-z, A-Z) or Numbers (0-9)

Step 3: Enter the Field Label

1. In the panel on the left, choose **Manage Labels**.
2. Enter a field label for each store view.

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."



Storefront Properties

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 Storefront** 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 incude the attribute on the product detail page, 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."
8. 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.

Attribute Sets

To create an attribute set:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.
2. Tap **Add Attribute 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. To create a new group, do the following:

a. In the **Groups** column of the attribute set, tap **Add New**.

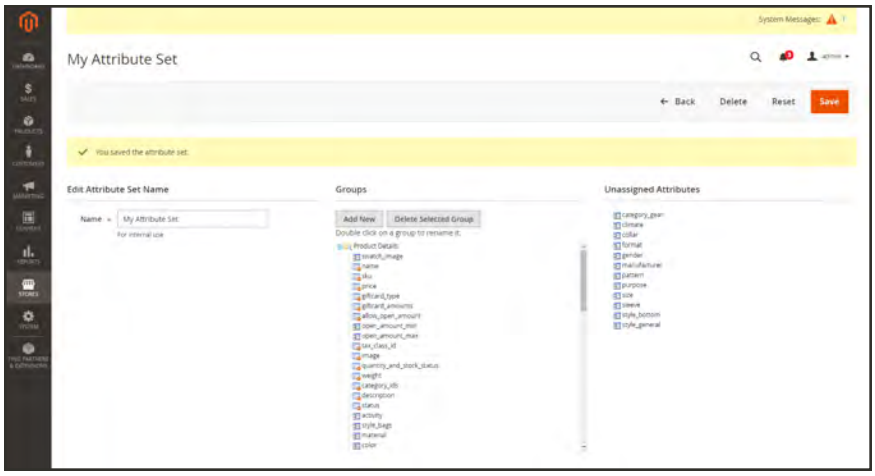
b. Enter a **Name** for the new group, and tap **OK**.

c. 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.

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



Edit Attribute Set

Notes

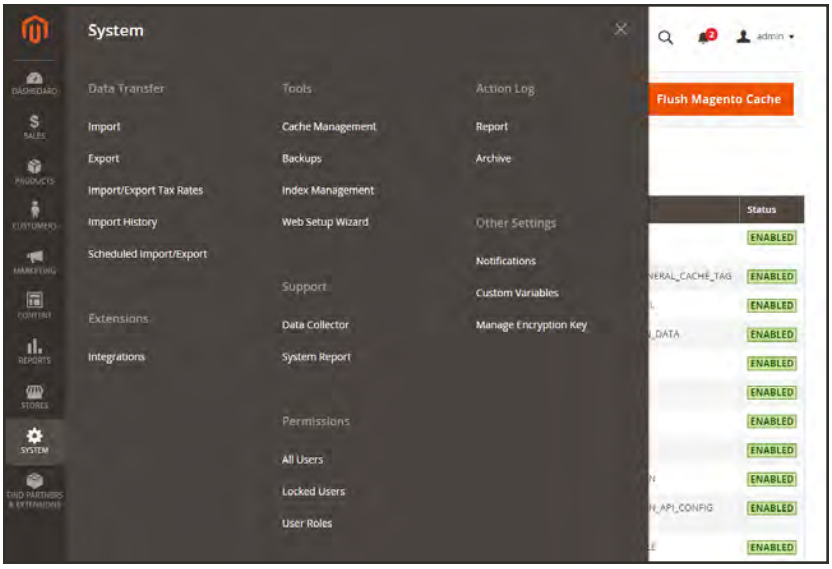
System

System

CHAPTER 78:

System Menu

The System Menu includes tools to import and export data, install extensions, manage system caches and indexes, manage permissions, backups, system notifications, and custom variables.



System Menu

Menu Options

Data Transfer

Use the data transfer tools to import or export small and large amounts of data. Includes Import History and Scheduled Import/Export.

Extensions

Manage integrations and extensions for your store.

Tools

Manage your system resources, including caches, backups,and indexers, and Web et up Wizard.

Support

Includes the Data Collector tool and system report to help our Support team identify and resolve issues:

Permissions

Create different levels of access for Admin users, and manage locked out user accounts.

Action Log

Analyze and manage information related to administrator activity and archived reports,

Other Settings

Notifications

Your store has an inbox for the messages received from Magento. The messages are rated by importance, and might refer to system updates, patches, new releases, scheduled maintenance, upcoming events, and more.

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.

Manage Encryption Key

The encryption key is used to protect passwords and other sensitive data. Magento can autogenerate an encryption key, or you can use one from another source.

Notes

CHAPTER 79:

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

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

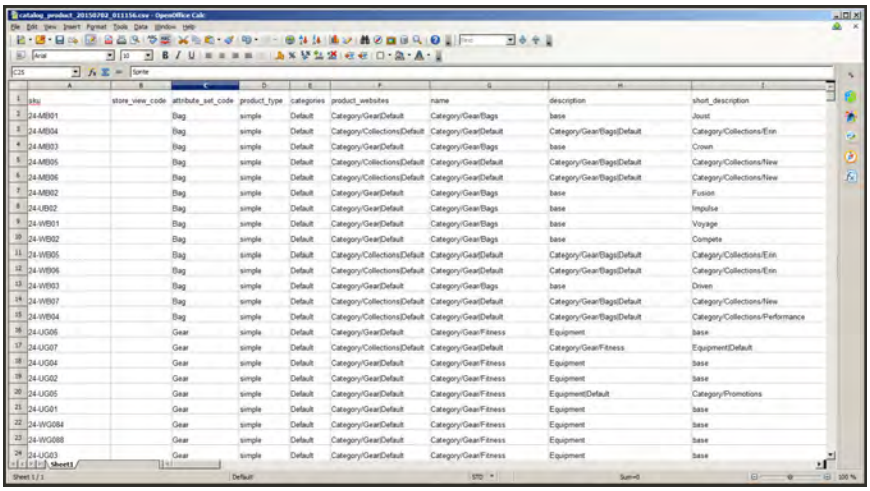
Important! We recommend that you use a program that supports UTF-8 encoding, such as Notepad++ or OpenOffice Calc, to edit CSV files. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento. If you work on 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

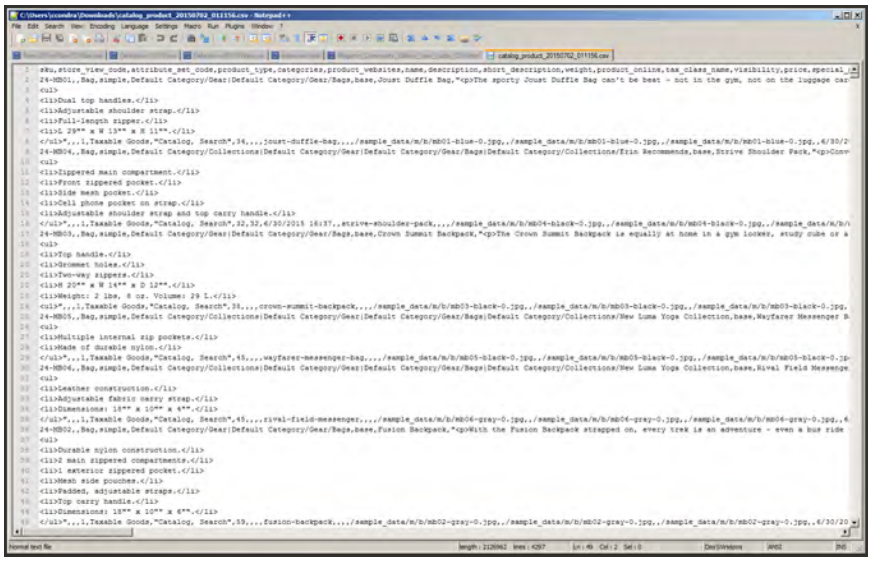
The first row of the table contains the names of each attribute, which are used as column headers. The remaining rows describe the individual product records. Any row that begins with a value in the SKU column is the beginning of a new product record. A single product might include several rows that 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.



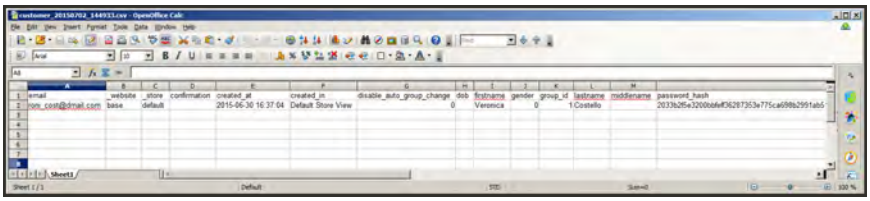
Exported Product CSV in Notepad++

CSV Product Structure

COLUMN NAME	DESCRIPTION
_<name>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not product attributes.
<attribute name>	Column headers with an attribute code or field name identify the column of data. A column might represent a system attribute, or one that was created by the store administrator.

Customer CSV Structure

The customers CSV file contains customer information from the database, and has the following structure:

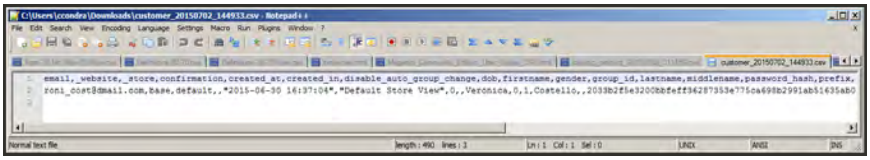


Exported Customer CSV in OpenOffice Calc

The first row of the table contains the names of the attribute columns (which are the same as attribute codes). There are two types of column names, as shown in the following table. Other rows contain attribute values, service data, and complex data. Each row with non-empty values in the “email” and “_website” columns starts the description of the subsequent customer. Each row can represent customer data with or without address data, or the address data only. In case a row contains only the address data, values in the columns, related to the customer profile, will be ignored and may be empty.

To add or replace more than one address for a customer, in the import file add a row for each new address with empty customer data and the new or updated address data below the customer data row.

For a detailed description of each customer attribute, see: Customer Attribute Reference.



Exported Customer CSV in Notepad++

CSV Customer Structure

COLUMN NAME	DESCRIPTION
_<name>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not customer attributes.
<attribute name>	The names of the columns with values of both system-created attributes, and attributes created by the store administrator.

Data Validation

All data must pass validation before it can be imported into the store, to ensure that the values are consistent with the system database. Validation begins when you tap the Check Data button. During the process, all entities in the import file are verified for the following:

Attributes	Column header names are verified to ensure that they match the corresponding attributes in the system database. The value of each attribute is checked to ensure that it meets the requirements of the data type (decimal, integer, varchar, text, and datetime)
Complex Data	Values that originate from a defined set, such as a drop-down or multiple select input type, are verified to ensure that the values exist in the defined set.
Service Data	The values in service data columns are verified to ensure that the properties or complex data values are consistent with what is already defined in the system database.
Required Values	For new entities, the presence of required attribute values in the file is checked. For existing entities, there is no need to re-check the existence of required attribute values.
Separators	Although the separators aren't visible when viewed in a spreadsheet, data values in a CSV file are separated by comma, and text values are enclosed in double-quotes. During the validation process, the separators are verified, and each set of quotes that enclose character strings is verified to be formatted correctly.

The results of the validation appear in the Validation Results section, and include the following information:

- The number of entities checked
- The number of invalid rows
- The number of errors found

If the data is valid, an "Import Success" message appears.

File is Valid!

If validation fails, read the description of each error, and correct the problem in the CSV file. For example, if a row contains an invalid SKU, the import process stops, and that row, and all subsequent rows are not imported. After correctly the problem, import the data again. If many errors are encountered, it might take several attempts to pass validation.

Data Validation Messages

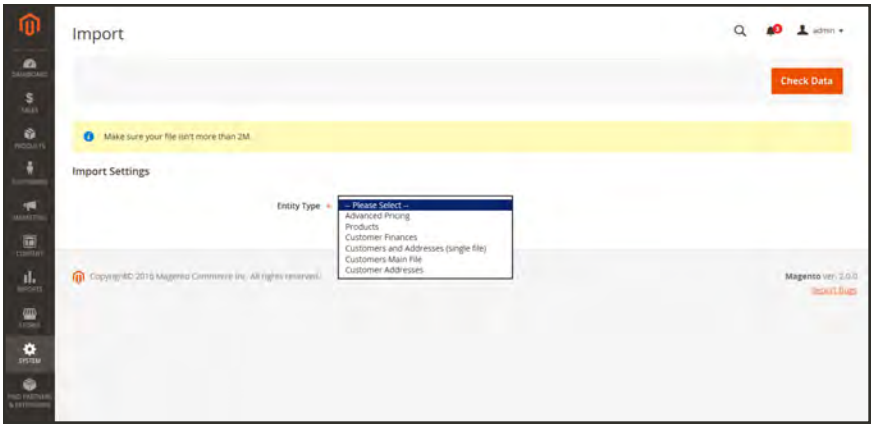
MESSAGES
DATA VALIDATION
• Product with specified SKU not found in rows: 1 • URL key for specified store already exists • '7z' file extension is not supported • 'txt' file extension is not supported
ERRORS
• Wrong field type. Type in the imported file %decimal%, expected type is %text%. • Value is not allowed. Attribute value does not exist in the system. • Field %column name% is required. • Wrong value separator is used. • Wrong encoding used. Supported character encoding is UTF-8 and Windows-1252. • Imported file does not contain SKU field. • SKU does not exist in the system. • Column name %column name% is invalid. Should start with a letter. Alphanumeric. • Imported file does not contain a header. • %website name% website does not exist in the system. • %storeview name% storeview does not exist in the system. • Imported attribute %attribute name% does not exist in the system. • Imported resource (image) could not be downloaded from external resource due to timeout or access permissions. • Imported resource (image) does not exist in the local media storage. • Product creation error displayed to the user equal to the one seen during manual product save. • Advanced Price creation error displayed to the user equal to the one seen during the manual product save. • Customer creation error displayed to the user equal to the one seen during the manual customer save.

Import

Data for all product types can be imported into the store. In addition, you can import customer data, customer address data, and product images. Import supports the following operations:

- Add/Update
- Replace Existing Complex Data
- Delete Entities

The maximum size of an import file is determined by the settings in the php.ini file on the server. The system message on the Import page indicates the current size limit.



Import

Process Overview:

Step 1: Prepare the Data

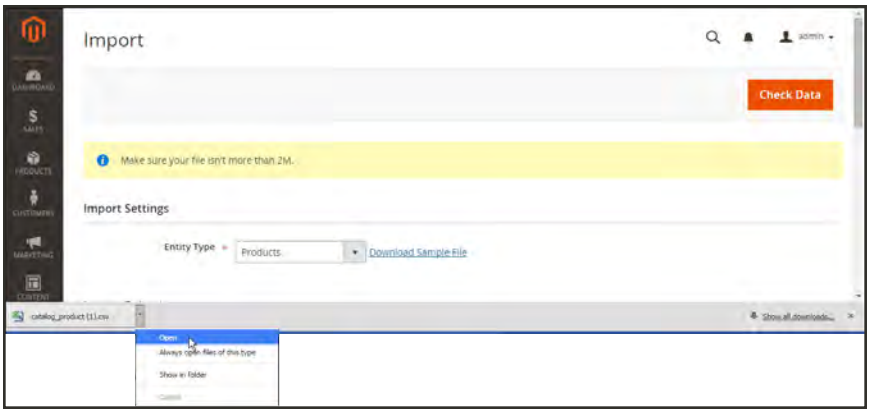
Step 2: Choose the Import Behavior

Step 3: Identify the Import File

Step 4: Check the Import Data

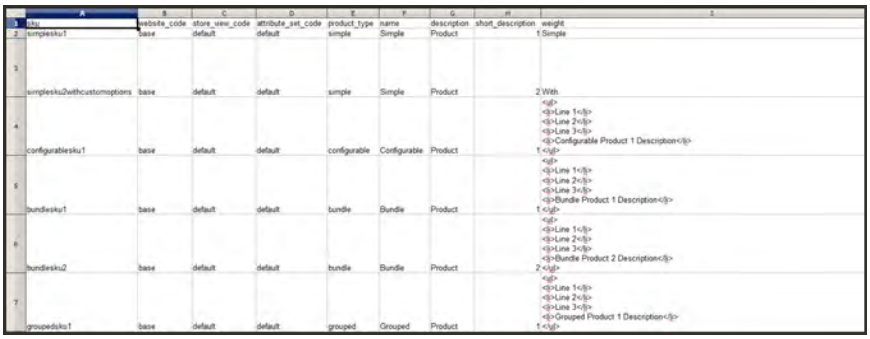
Step 1: Prepare the Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import**.
2. Under Import Settings, set **Entity Type** to one of the following:
   - Advanced Pricing
   - Products
   - Customer Finances
   - 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.



sku	website_code	store_view_code	attribute_set_code	product_type	name	description	short_description	weight
simplesku1	base	default	default	simple	Simple	Product		1 Simple
simplesku2withcustomoptions	base	default	default	simple	Simple	Product		2 With
configurablesku1	base	default	default	configurable	Configurable	Product		1 - Line 1 - Line 2 - Line 3 - Configurable Product 1 Description
bundlesku1	base	default	default	bundle	Bundle	Product		1 - Line 1 - Line 2 - Line 3 - Bundle Product 1 Description
bundlesku2	base	default	default	bundle	Bundle	Product		2 - Line 1 - Line 2 - Line 3 - Bundle Product 2 Description
groupedsku1	base	default	default	grouped	Grouped	Product		1 - Line 1 - Line 2 - Line 3 - Grouped Product 1 Description

Downloaded Sample File

4. Examine the structure of the sample file. As you prepare your CSV import file, make sure that the column headings are spelled correctly.

5. Verify that the size of your import file does not exceed the limit shown in the message.

6. If the import data includes paths to product images, make sure that the image files have been uploaded to the appropriate location. The default location on the Magento server is: `pub/media/import`.

   If the images reside on an external server, make sure that you have the full URL to the directory that contains the images.

Step 2: Choose the Import Behavior

1. Set **Import Behavior** to one of the following:
   - Add/Update
   - Replace Existing Complex Data
   - Delete Entities
2. Do the following:
   a. Accept the default value of a comma (,) for the **Field separator**.
   b. Accept the default value of a comma (,) for the **Multiple value separator.**

   In a CSV file, a comma is the default separator. To use a different character, make sure that the data in the CSV file matches the character that you specify.

Import Behavior

Step 3: Identify the Import File

1. Tap **Choose File** to select the file to import.
2. Find the CSV file that you prepared to import, and tap **Open**.
3. If the import data includes paths to product images, enter one of the following in the **Images File Directory** field:

- The path to the uploaded images on the Magento server. For example: `var/import`.
- The full URL to the images on another server. For example: `http://domain.com/images`

To learn more about importing product images, see: Importing Product Images.

File to Import

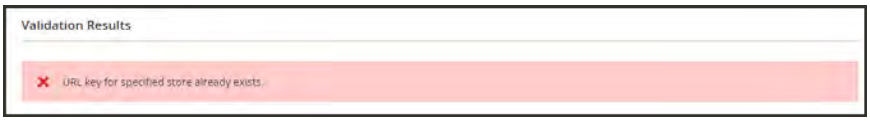
Step 4: Check the Import Data

1. In the upper-right corner, tap **Check Data**.
2. Then, wait a few moments for the validation process to complete. If the import data is valid, the following message appears:

File is Valid!

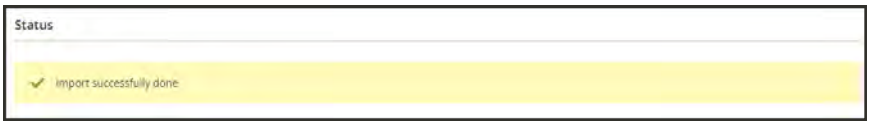
3. If the file is valid, tap **Import**. Otherwise, correct each problem with the data that is listed in the message, and try to import the file again.
4. The import process continues to the end of the data, unless an error is encountered.

   If an error message appears in the Validation Results, correct the problem in the data, and import the file again. For a list of known errors, see: Import Troubleshooting.



URL Key Already Exists

When the import is auccessfully completes, the following message appears:



Import Complete

Import Behavior

OPERATION	DESCRIPTION
Add/Update	New product data is added to the existing product data for the existing entries in the database. All fields except `sku` can be updated. 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
Replace Existing Complex Data	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.
Delete Entities	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.

Importing Product Images

Multiple product images of each type can be imported into Magento, and associated with a specific product. The path and file name of each product image is entered in the CSV file, and the image files to be imported are uploaded to the corresponding path on the Magento server or external server.

Magento creates its own directory structure for product images that is organized alphabetically. When you export product data with existing images to a CSV file, you can see the alphabetized path before the file name of each image. However, when you import new images, you don't need to specify a path, because Magento manages the directory structure automatically. Just make sure to enter the relative path to the import directory before the file name of each image to be imported.

To upload images, you must have login credentials and correct permissions to access to the Magento folder on the server. With the correct credentials, you can use any SFTP utility to upload the files from your desktop computer to the server.

Before you try to import a large amount of images, review the steps in the import method that you want to use, and run through the process with a few products. After you understand how it works, you'll feel confident importing large quantities of images.

Important! We recommend that you use a program that supports UTF-8 encoding to edit CSV files, such as Notepad++ or OpenOffice Calc. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento.

Method 1: Import Images from the Local Server

1. On the Magento server, upload the image files to the `pub/media/import` folder. This is the default folder for importing product images.

```
[magento installation folder]/pub/media/import
```

   You can use a different folder on the Magento server, as long as the path to the folder is specified during the import process.

2. In the CSV data, enter the name of each image file to be imported on the correct row, by `sku`, and in the correct column according to image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_image`).

   Make sure to include the relative path to the import directory before each file name, as follows:

```
/pub/media/import/image.jpg
```

The CSV file needs to include only the `sku` column and the related image columns.

	A	B	C	D	E	F	G	H
1	sku	base_image	base_image_label	small_image	small_image_label	thumbnail_image	thumbnail_image_label	
2	LFM	/pub/media/import/membership.png	Membership	/pub/media/import/membership.png	Membership	/pub/media/import/membership.png	Membership	
3								
4								

CSV Image Import Data

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_image`).

```
http://example.com/images/image.jpg
```

3. Follow the instructions to import the data.

Import Guidelines

New Entities

- Entities are added with the attribute values specified in the CSV file.
- If there is no value, or there is a non-valid value, for a required attribute with no default value set, then the entity (the corresponding row or rows) cannot be imported.
- If there is no value, or there is a non-valid value, for a required attribute with the default value set, then the entity (the corresponding row or rows) is imported, and the default value is set for the attribute.
- If the complex data is not valid, then the entity (the corresponding row or rows) cannot be imported.

Existing Entities

- For attributes that are not complex data, the values from the import file, including the empty values for the non-required attributes, replace the existing values.
- If there is no value, or there is a non-valid value, for a required attribute, then the existing value is not replaced.
- If the complex data for the entity is invalid, the entity (the corresponding row or rows) cannot be imported, except the case, when Delete Entities was selected in the Import Behavior drop-down menu.

Complex Data

If an attribute that is specified in the import file already exists, and its value is derived from a defined set of values, the following applies:

- If the value is not already included in the defined set of values, the row can be imported and a default value, if defined, is set for the attribute.
- If the value is already included in the defined set, the corresponding row cannot be imported.

If an attribute name is specified in the import file but is not yet defined in the system, it is not created, and its values are not imported.

Invalid Files

- A file cannot be imported if all rows are invalid.
- A non-existing service data or complex data name is specified in the import file, such as a column with a "`_<non-existing name>`" heading.

Export

The best way to become familiar with the structure of your database is to export the data and open it in a spreadsheet. Once you become familiar with the process, you'll find that it is an efficient way to manage large amounts of information.

To export data:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Export**.
2. In the Export Settings section, specify the following:
   a. Set **Entity Type** to one of the following:
      - Products
      - Customers Main File
      - Customer Addresses
   b. Accept the default **Export File Format** of "CSV."

Export Settings

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.

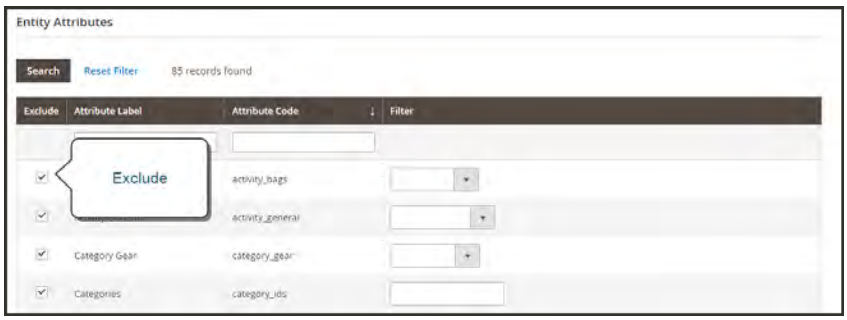
Filtered Entity Attributes

4. To filter the exported data based on attribute value, do the following:

- To export only records with specific attribute values, enter the required value in the **Filter** column. The followng example exports only a specific SKU.

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.



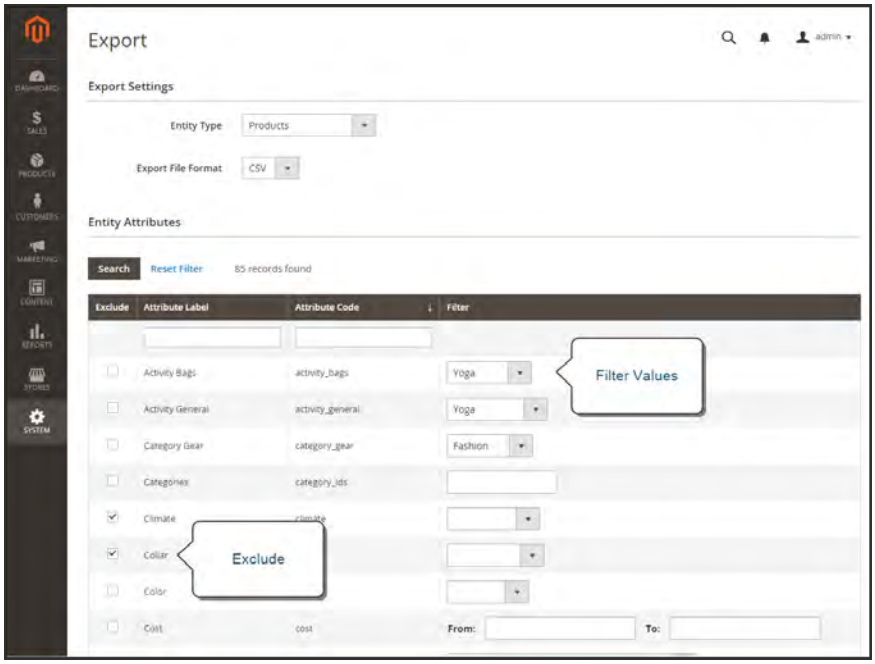
Exclude Attributes

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 in the export file, based on attribute value. In addition, you can specify which attribute data you want to include or exclude from the export.



Export Criteria

Export Filters

You can use filters to determine which SKUs are included in the export file. For example, if you enter a value in the Country of Manufacture filter, the exported CSV file will incude 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 inlcude only records with a specific value, such as a sku, type the value into the Filter field. Some fields such as Price, Weight, and Set Product as New have a from/to range of values.

Exclude Attributes

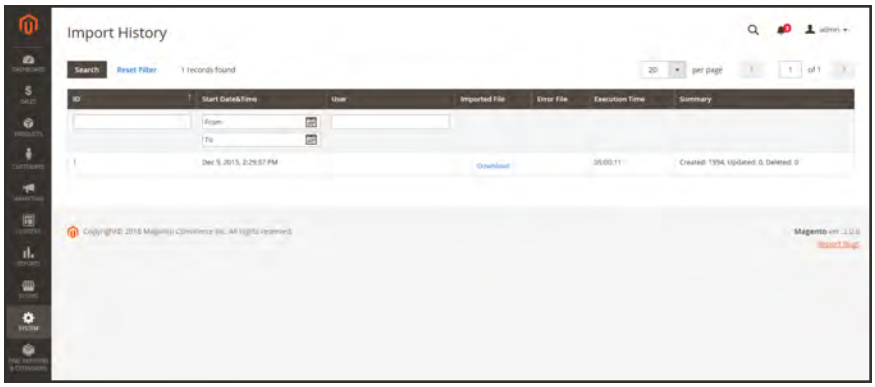
The checkbox in the first column is used to exclude attributes from the export file. If an attribute is excluded, the associated column in the export data is included, but empty.

Export Criteria

EXCLUDE	FILTER	RESULT
☐	No	The exported file contains each attribute for all existing records.
☐	Yes	The export file contains each attribute with only the records allowed by the filter.
☑	No	The export file does not include the column for the excluded attribute, but does include all existing records.
☑	Yes	The export file does not include the column for the excluded attribute, and contains only the records allowed by the filter.

Import History

The Import History grid lists each file that has been imported into your store, and includes the starting date and time, user, execution time, any errors that occurred during the process, and Download link.



Import History

To view the import history:

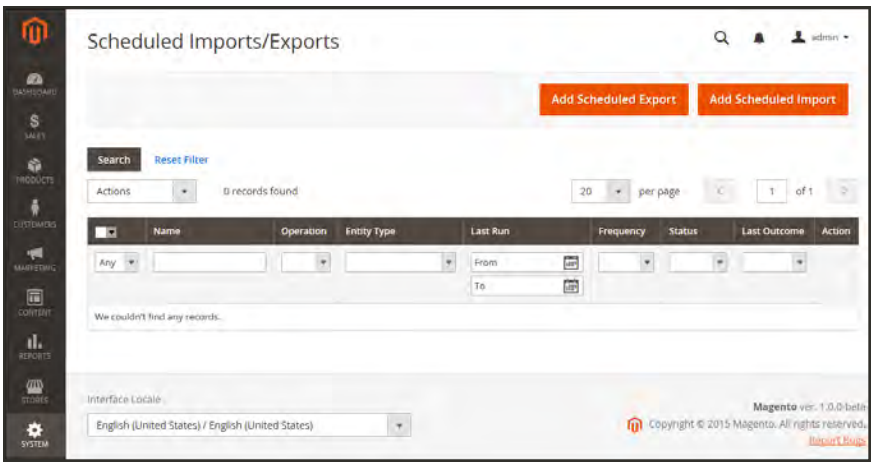
1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import History**.
2. To download the import file, click the **Download** link in the Imported File column.

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 the scheduled import/export:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Scheduled Import/Export**.



Scheduled Import/Export

2. To create a new scheduled import or export job, tap the appropriate button. Then follow the instructions for the type of scheduled job.
   - Add Scheduled Export
   - Add Scheduled Import

   When the record is saved, the job appears in the Scheduled Import/Export grid.

3. After each scheduled job, a copy of the file is placed in the `var/log/import_export` directory on the Magento local server.

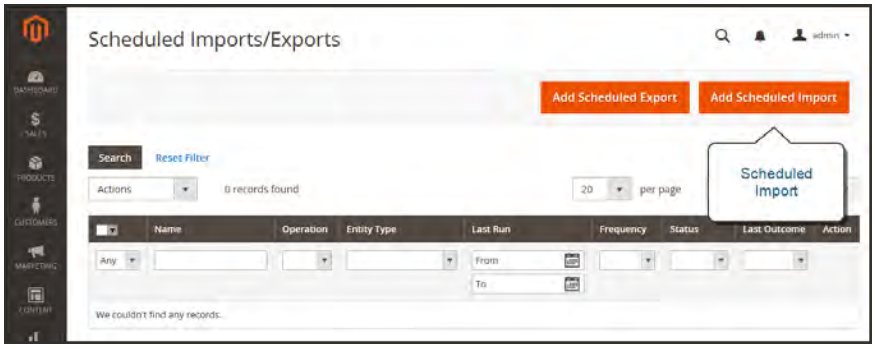
   The details of each operation are not written to the log. If an error occurs, notification is sent of the failed import/export job, with a description of the error.

Scheduling an Import

The Scheduled Import process is similar to the manual Import process, with respect to the available import file format and types of import entities:

- The import file should be in .CSV format
- You can import product and customer data

The advantage of using Scheduled Import is that you can import a data file multiple times automatically, after specifying the import parameters, and schedule only once.



Add Scheduled Import

The details of each import operation are not written to a log, but in case of failure you will receive an Import Failed email, with a description of the error. The result of the last scheduled import job is shown in the Last Outcome column on the Scheduled Import/Export page.

After each import operation, a copy of the import file is placed in the `var/log/import_export` directory on the server where Magento is deployed. The timestamp, the marker of the imported entity (products or customers), and the type of the operation (in this case, import) are added to the import file name.

After each scheduled import job, a reindex operation is performed automatically. On the frontend, changes in the descriptions and other text information are reflected after the updated data goes to the database, and the changes in prices are reflected only after the reindex operation.

Process Overview

Step 1: Complete the Import Settings

Step 2: Complete the Import File Information

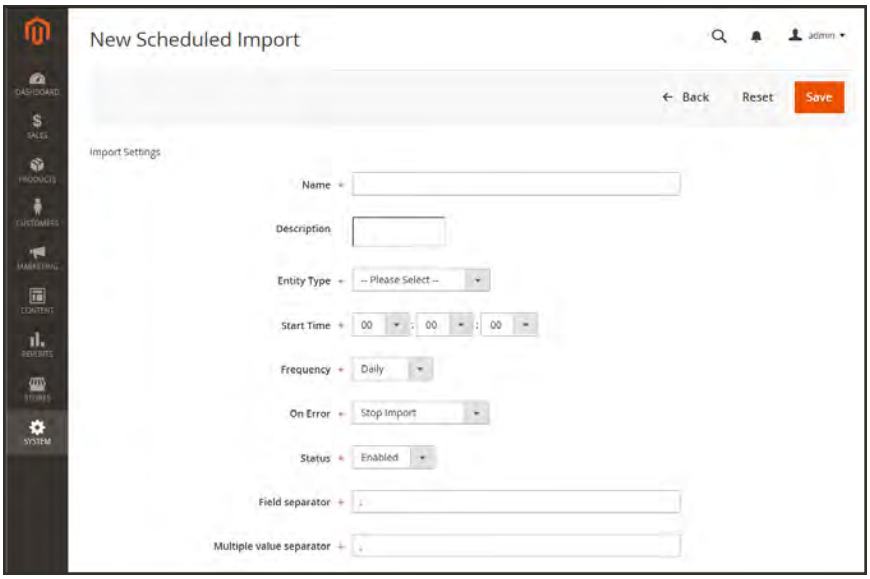
Step 3: Configure the Import Failed Emails

Step 1: Complete the Import Settings

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export**.
2. In the upper-right corner, tap **Add Scheduled Import**. Then, do the following:
   a. Enter a **Name** for the scheduled import.
   b. Enter a brief **Description** that explains the purpose of the import, and how it is to be used.
   c. Set **Entity Type** to one of the following:
      - Products
      - Customers
   d. Set **Import Behavior** to one of the following:

Append Complex Data	Adds new complex data to the existing complex data for existing entries in the database. This is the default value.
Replace Existing Complex Data	Writes over existing complex for existing entities in the database.
Delete Entities	Deletes existing entries in the database.

   e. Set **Start Time** to the hour, minute, and second that the import is scheduled to begin.
   f. Set **Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthly
3. In the **Field Separator** field, enter the character that is used to separate fields in the import file. The default character is a comma.
4. In the **Multiple Value Separator** field, enter the character that is used to separate multiple values within a field.
5. To activate the scheduled import, set **Status** to “Enabled.”



Import Settings

Step 2: Complete the Import File Information

1. Set **Server Type** to one of the following:

Local Server	Imports the data from the same server where Magento is installed.
Remote FTP	Imports the data from a remote server.

Import File Information

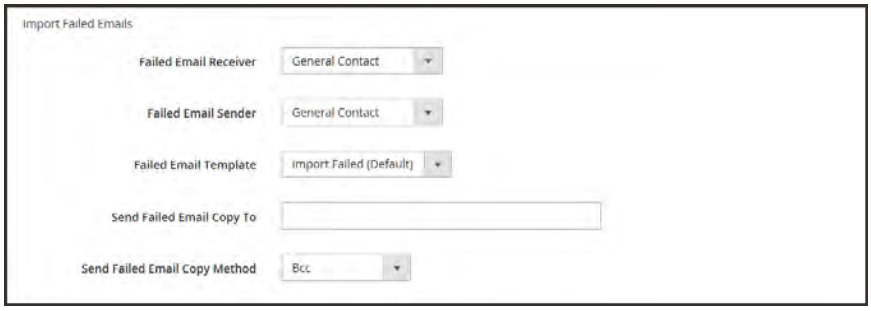
2. Enter the **File Directory** where the import file originates.
   - For Local Server, enter a relative path in the Magento installation. For example, var/import.
   - For Remote FTP server, enter the full URL and path to the import folder on the remote server.
3. Enter the **File Name** to be imported.

4. In the **Images File Directory** field, enter the path to the directory where product images are stored. On a local server, enter a relative path such as: `var/import`.

Step 3: Configure the Import Failed Emails

1. Set **Failed Email Receiver** to the store contact who is to receive notification if an error occurs during the import.
2. Set **Failed Email Sender** to the store contact that appears as the sender of the notification.
3. Set **Failed Email Template** to the template that is used for the notification.
4. In the **Send Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the notification. Separate multiple email addresses with a comma.
5. Set **Failed Email Copy Method** to one of the following:

Bcc	Sends a blind courtesy copy of the failed import notification. The name and address of the recipient is included in the original email distribution, but hidden from view.
Separate Email	Sends a copy of the failed import notification as a separate email.



Import Failed Emails

6. When complete, tap **Save**.

   The new scheduled import job is added to the list on the Scheduled Import/Export page. From this page it can be run immediately for testing and edited. The import file is validated before the execution of each import job.

Field Descriptions

FIELD	DESCRIPTION
IMPORT SETTINGS	
Name	The name of the import. Helps you to distinguish it if many different scheduled imports are created.
Description	(Optional) You can enter an additional description.
Entity Type	Defines the data to be imported. Options: Products / Customers.
Import Behavior	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.
Start Time	Set the start hour, minutes, and seconds of the import.
Frequency	Define how often the import will be run. Options: Daily/Weekly/Monthly.
On Error	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.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Status	The import is enabled by default. You can suspend it by setting the Status to Disabled.
Field Separator	Determines the character that is used to separate fields. Default value: , (comma)
Multiple Value Separator	Determines the character that is used to separate multiple values within a field. Default value: , (comma)
IMPORT FILE INFORMATION	
Server Type	You can import from a file located on the same server where Magento is deployed (select Local Server) or from the remote FTP server (select Remote FTP). If you select Remote FTP, additional options for credentials and file transfer settings appear.
File Directory	Specify the directory where the import file is located. If Server Type is set to Local Server, specify the path relative to the Magento installation directory. For example, var/import.
File Name	Specify the name of the import file.
Images File Directory	Enter the path to the directory where product images are stored. For a local server, enter a relative path. For example: `var/import`
IMPORT FAILED EMAILS	
Failed Email Receiver	Specify the email address to which an email notification (failed import email) is sent if the import fails.
Failed Email Sender	Specify the email address that is used as the sender for the import failed email.
Failed Email Template	Select a template for the import failed email. By default, only the Import Failed (Default Template from Locale option is available. Custom templates can be created under System > Transactional Emails.

Field Descriptions (cont.)

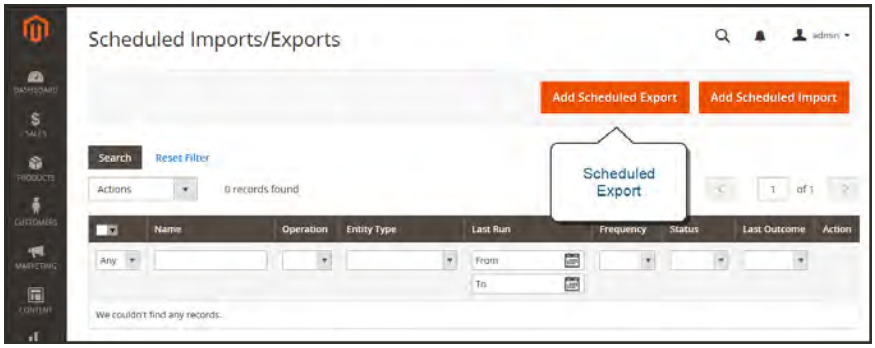
FIELD	DESCRIPTION
Send Failed Email Copy To	The email address to which a copy of import failed email is sent.
Send Failed Email Copy Method	Select the copy sending method for the import failed email.

Scheduling an Export

Scheduled Export is similar to manual Export, with respect to the available export file format and types of entities that can be exported:

- You can export to .CSV format
- You can export product and customer data

The advantage of using Scheduled Export is that you can export data multiple times automatically, after specifying the export parameters, and schedule only once



Add Scheduled Export

The details of each export are not written to a log, but in case of failure you will receive an Export Failed email, which contains the error description. The result of the last export job appears in the Last Outcome column on the Scheduled Import/Export page.

After each export, the export file is placed in the user-defined location, and a copy of the file is placed in the `var/log/import_export`directory on the server where Magento is deployed. The timestamp and the marker of the exported entity (products or customers) and type of the operation (in this case, export) are added to the export file name.

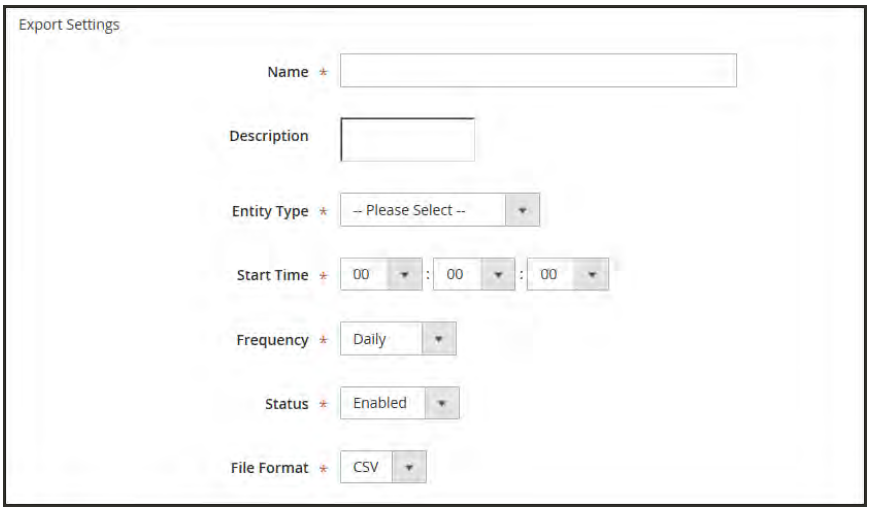
Process Overview

Step 1: Complete the Export Settings

Step 1: Complete the Export Settings

1. On the Admin sidebar, tap **System**. Then under **Data Transfer,** choose **Scheduled Import/Export**.
2. In the upper-right corner, tap **Add Scheduled Export**. Then, do the following:
   a. Enter a **Name** for the scheduled export.
   b. Enter a brief **Description** that explains the purpose of the export, and how it is to be used.
   c. Set **Entity Type** to one of the following:
      - Products
      - Customers

      The Entity Attributes section at the bottom of the page is updated to reflect the selected Entity Type.
   d. Set **Start Time** to the hour, minute, and second that the export is scheduled to begin.
   e. Set **Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthly
   f. To activate the scheduled export, set **Status** to “Enabled.”
   g. Accept “CSV” as the default **File Format**.



Export Settings

Step 2: Complete the Export File Information

1. Set **Server Type** to one of the following:

Local Server	To save the export file on the same server where Magento is installed.
Remote FTP	To save the export file on a remote server.

Export File Information

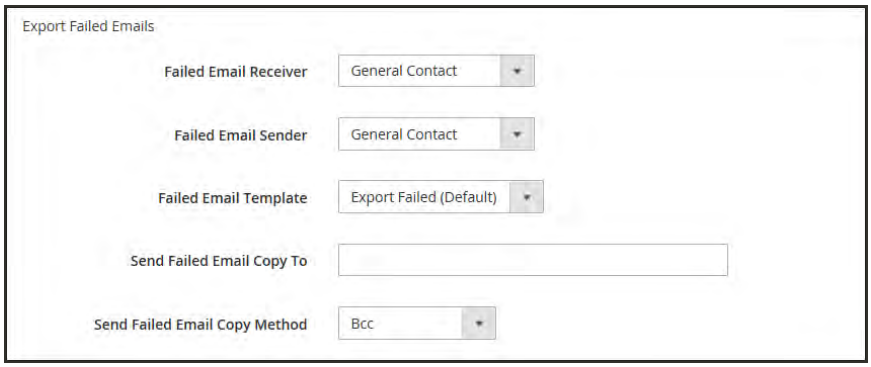
2. Enter the **File Directory** where the export file is to be saved as follow:.
   - For Local Server, enter a relative path within the Magento installation. For example, var/export.
   - For Remote FTP server, enter the full URL and path to the target folder on the destination server.

Step 3: Configure the Export Failed Emails

1. Set **Failed Email Receiver** to the store contact who is to receive notification if an error occurs during the export.
2. Set **Failed Email Sender** to the store contact that appears as the sender of the notification.

3. Set **Failed Email Template** to the template that is used for the notification.
4. In the **Send Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the notification. Separate multiple email addresses with a comma.
5. Set **Failed Email Copy Method** to one of the following:

Bcc	Sends a blind courtesy copy. The name and address of the recipient is included in the original email distribution, but is hidden from view.
Separate Email	Sends the copy as a separate email.



Export Failed Emails

Step 4: Choose the Entity Attributes

1. In the Entity Attributes section, choose the attributes that you want to include in the export data.
   - To filter export data by attributes value, enter the attribute value in the Filter column.
   - To exclude products or customers with certain attribute values, enter the values of the attributes that you want to exclude, and select the checkbox in the Skip column.
2. When complete, tap **Save**.

   The new scheduled export job is added to the list on the Scheduled Import/Export page. From this page it can be run immediately, for testing, and edited.

Field Descriptions

FIELD	DESCRIPTION
EXPORT SETTINGS	
Name	The name of the export. Helps you to distinguish it if many different scheduled exports are created.
Description	(Optional) A description of the scheduled export.
Entity Type	Identifies the data to be exported. After the selection is made, the Entity Attributes appear below. Options include: Products /Customers.
Start Time	Set the start hour, minutes, and seconds of the export.
Frequency	Define how often the export job will be executed. Options include:Daily/Weekly/Monthly.
Status	A new scheduled export is enabled by default. You can suspend it by setting Status to Disabled. Options include: Enabled/Disabled.
File Format	Select the format of the export file. Currently only the .CSV option is available.
EXPORT SETTINGS INFORMATION	
Server Type	Determines the location of the export file. Options include: Local Server — Places the export file on the same server where Magento is deployed. Remote FTP — Places the export file on a remote server. Additional options for credentials and file transfer settings appear.
File Directory	Specify the directory where the export file is placed. In case Server Type is set to Local Server, specify the relative to Magento installation path. For example, var/export.
EXPORT FAILED EMAILS	

Field Descriptions (cont.)

FIELD	DESCRIPTION
Failed Email Receiver	Specify the email address to which an email notification (export failed email) is sent if the export fails.
Failed Email Sender	Specify the email address that is used as export failed email sender.
Failed Email Template	Select a template for the failed export email. By default, only the Export Failed (Default Template from Locale) option is available.
Send Failed Email Copy To	The email address to which a copy of the failed export email is sent.
Send Failed Email Copy Method	Specify the copy sending method for the export failed email.

Product Attribute Reference

The following table lists the attributes from a typical product export, in the default order in which they appear. Each attribute is represented in the CSV file as a column, and product records are represented by rows. Columns that begin with an underscore contain service data such as properties or option values for complex data.

The installation used to export this data has the sample data installed, and has two websites and several store views. Although this list includes all columns that are typically exported, the `sku` is the only required value. To import data, you can include only the columns with changes. The `sku` should be the first column, but the order of the rest of the attributes doesn't matter.

Simple Product CSV File Structure

ATTRIBUTE	DESCRIPTION
`sku`	(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 A SKU longer than 64 characters will cause import to fail.
`store_view_code`	Identifies the specific store view(s) where the product is available. If blank, the product is available at the default store view. For example: storeview1 english,spanish
`attribute_set_code`	Assigns the product to a specific attribute set or product template, according to product type. Once the product is created, the attribute set cannot be changed. For example: default
`product_type`	Indicates the type of product.Values include: `simple` Tangible items that are generally sold as single units or in fixed quantities. `grouped` A group of separate products that is sold as a set.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION	
	`configurable`	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.
	`virtual`	A non-tangible product that does not require shipping and is not kept in inventory. Examples include services, memberships, and subscriptions.
	`bundle`	A customizable product set of simple products that are sold together.
`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.	
`short_description`	The use of the short product description depends on the theme. It might appear in product listings and is sometimes used in RSS feed listings sent to shopping sites.	

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
`weight`	The weight of the individual product. The actual product weight is determined by the carrier at the time of shipment.
`product_online`	Determines if the product is available for sale in the store. Values include: 1 — (Yes) The product is immediately available for sale in your store. 0 (or blank) — (No) The product is not included in online catalog listings.
`tax_class_name`	The name of the tax class that is associated with this product.
`visibility`	Determines if the product is visible in the catalog, and made available for search. Values include: Not Visible Individually — The product is not included in product listings, although it might be available as a variation of another product. Catalog — The product appears in all catalog listings. Search — The product is available for search operations. Catalog, Search — The product is included in catalog listings and is also available for search.
`price`	The price that the product is offered for sale in your store.
`special_price`	The discounted price of the product during the specified date range.
`special_price_from_date`	The beginning date of the time period when the special price is in effect.
`special_price_to_date`	The last date of the time period when the special price is in effect.
`url_key`	The part of the URL that identifies the product. The default value is based on the product name. For example: product-name

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
meta_title	The meta title appears in the title bar and tab of the browser and search results lists. The meta title should be unique to the product, incorporate high-value keywords, and be less than 70 characters in length.
meta_keywords	Meta keywords are visible only to search engines, and are ignored by some search engines. Choose high-value keywords, separated by a comma. For example: keyword1,keyword2,keyword3.
meta_description	Meta descriptions provide a brief overview of the product for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field accepts up to 255 characters.
base_image	The relative path for the main image on the product page. Magento stores files internally in an alphabetical folder structure.You can see the exact location of each image in the exported data. For example: /sample_data/m/b/mb01-blue-0.jpg To upload a new image or write over an existing image, enter the file name, preceded by a forward slash. For example: /image.jpg
base_image_label	The label that is associated with the base image.
small_image	The file name of the small image that is used on catalog pages, preceded by a forward slash. For example: /image.jpg
small_image_label	The label associated with the small image. For example: Small Image 1, Small Image 2
thumbnail_image	The file names of any thumbnail image to appear in the gallery on the product page, preceded by a forward slash. For example: /image.jpg
thumbnail_image_label	The label associated with any thumbnail images. For example: Thumbnail 1, Thumbnail 2

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
created_at	Indicates the date when the product was created. The date is automatically generated when the product is created, but can be edited later.
updated_at	Indicates the date when the product was last updated.
new_from_date	Specifies the “from” date for new product listings, and determines if the product is featured as a new product.
new_to_date	Specifies the “to” date for new product listings, and determines if the product is featured as a new product.
display_product_options_in	If the product has multiple options, determines where they appear on the product page. Values include: Product Info Column Block after Info Column
map_price	The minimum advertised price of the product. (Appears only if MAP is enabled.)
msrp_price	The manufacturer’s suggested retail price for the product. (Appears only if MAP is enabled.)
map_enabled	Determines if Minimum Advertised Price is enabled in the configuration. Values include: 1 (Yes) MAP is enabled. 0 (or blank) (No) MAP is not enabled.
gift_message_available	Determines if a gift message can be included with the product purchase. Values include: 1 (Yes) The option to include a gift message is presented to the customer. 0 (or blank) (No) The option to include a gift message is not presented to the customer.
custom_design	Lists the available themes that can be applied to the product page.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
custom_design_from	Specifies the beginning date when the selected theme is applied to the product page.
custom_design_to	Specifies the end date when the selected theme is applied to the product page.
custom_layout_update	Additional XML code that is applied as a layout update to the product page.
page_layout	Determines the page layout of the product page. Values include: No layout updates — No change is made to the page layout. 1 column — Applies a one- column layout to the product page. 2 columns with left bar — Applies a two-column layout with a left sidebar to the product page. 2 columns with right bar — Applies a two-column layout with a right sidebar to the product page. 3 columns — Applies a three-column layout to the product page. empty — Applies a blank layout to the product page.
product_options_container	If the product has multiple options, determines where they appear on the product page. Values include: Product Info Column Block after Info Column
msrp_display_actual_price_type	Determines where the actual price of a product is visible to the customer.Values include: 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.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	On Gesture — Displays the actual product price in a popup when the customer clicks the “Click for price” or “What’s this?” link.
`country_of_manufacture`	Identifies the country where the product was manufactured.
`additional_attributes`	Additional attributes created for the product. For example: has_options=0,required_options=0 color=Black,has_options=0,required_options=0,size_general=XS
`qty`	The quantity of the product that is currently in stock.
`out_of_stock_qty`	The stock level that determines the product to be out of stock.
`use_config_min_qty`	Determines if the default value from the configuration is used, and corresponds to the Use Config Settings checkbox. Values include: 1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
`is_qty_decimal`	Determines if the `qty` attribute has a decimal value. Values include: 1 — (Yes) The value of the `qty` attribute is a decimal value. 0 (or blank) — (No) The value of the `qty` attribute is a whole number (integer).
`allow_backorders`	Determines if your store allows backorders, and how they are managed.
`use_config_backorders`	Determines if the default configuration setting for backorders is used, and corresponds to the state of the Use Config Settings checkbox. Values include:

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	1 (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) (No) The default configuration can be overridden for the value of this attribute.
`min_cart_qty`	Specifies the minimum quantity of the item that can be purchased in a single order.
`use_config_min_sale_qty`	Determines if the default configuration setting for minimum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values include: 1 (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) (No) The default configuration can be overridden for the value of this attribute.
`max_cart_qty`	Specifies the maxinum quantity of the product that can be purchased in a single order.
`use_config_max_sale_qty`	Determines if the default configuration setting for maximum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values include: 1 (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) (No) The default configuration can be overridden for the value of this attribute.
`is_in_stock`	Indicates if the product is in stock.
`notify_on_stock_below`	Specifies the stock level that triggers an “out of stock” notification.
`use_config_notify_stock_qty`	Determines if the default configuration setting is used to trigger stock level notification, and corresponds to the state of the Use Config Settings checkbox. Values include:

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
`manage_stock`	Determines if inventory control is used to manage the product. Values include:	
	1	(Yes) Activates full inventory control to manage stock levels of the product.
	0 (or blank)	(No) The system does not keep track of the number of items that are currently in stock.
`use_config_manage_stock`	Determines if the default configuration setting for managing stock is used, and corresponds to the state of the Use Config Settings checkbox. Values include:	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
`use_config_qty_increments`	Determines if the default configuration setting for quantity increments is used, and corresponds to the state of the Use Config Settings checkbox.. Values include:	
	1	(Yes) The default configuration setting is used for the value of this attribute.
	0 (or blank)	(No) The default configuration can be overridden for the value of this attribute.
`qty_increments`	Determines if the product is sold in quantity increments. Options include: Yes / No	
`use_config_enable_qty_inc`	Determines if the default configuration setting to enable quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values include:	

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	1 (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) (No) The default configuration can be overridden for the value of this attribute.
`enable_qty_increments`	Determines if quantity increments are enabled for the product.
`is_decimal_divided`	Determines if parts of the product can be shipped separately. Options include: Yes / No
`website_id`	For installations with multiple websites, identifies a specific website where the product is available. If blank, the product is available in all websites.
`related_skus`	Lists the `sku` of each product that has been identified as a Related Product. For example: 24-WG080,24-UG03,24-UG01,24-UG02
`crosssell_skus`	Lists the `sku` of each product that has been identified as a Cross-sell.
`upsell_skus`	Lists the `sku` of each product that has been identified as an Upsell.
`additional_images`	The file names of any additional image to be associated with the product, preceded by a forward slash. For example: /image.jpg
`additional_image_labels`	The labels associated with any additional images. For example: Label 1, Label 2
`custom_options`	For example: name=Color, type=drop_down, required=1, price=, price_type=fixed, sku=,option_ title=Black|name=Color, type=drop_down, required=1, price=,price_type=fixed, sku=,option_title=White

SERVICE DATA FOR PRODUCT VARIATIONS

Simple Product CSV File Structure (cont.)

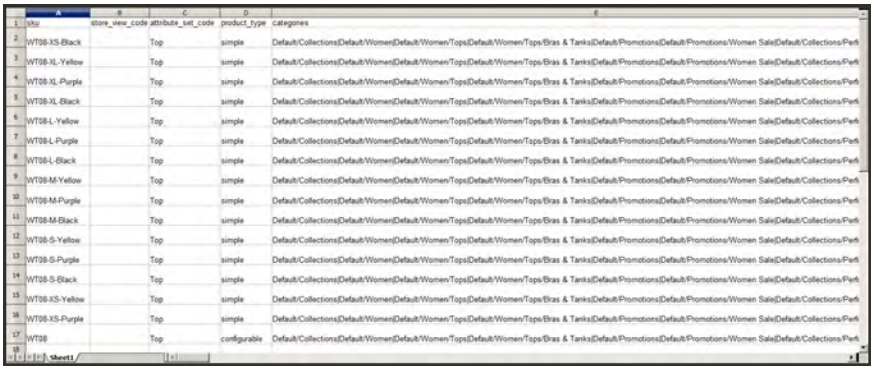
ATTRIBUTE	DESCRIPTION
`_super_products_sku`	The generated SKU for a configurable product variation. For example: WB03-XS-Green Applies to: Configurable Products
`_super_attribute_code`	The attribute code of a configurable product variation. For example: color Applies to: Configurable Products
`_super_attribute_option`	The value of a configurable product variation. For example: green Applies to: Configurable Products
`_super_attribute_price_corr`	A price adjustment that is associated with a configurable product variation. Applies to: Configurable Products
`_associated_sku`	The SKU of a product that is associated with a grouped product. Applies to: Grouped Products Bundle Products
`_associated_default_qty`	Determines the quantity of the associated product that is included. Applies to: Configurable Products Grouped Products Bundle Products
`_associated_position`	Determines the position of the associated product when listed with other associated products. Applies to: Configurable Products Grouped Products Bundle Products

Complex Data

The term **complex data**[1] 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.



	A	B	C	D	E
1	sku	store_view_code	attribute_set_code	product_type	categories
2	WT08-XS-Black		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
3	WT08-XL-Yellow		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
4	WT08-XL-Purple		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
5	WT08-XL-Black		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
6	WT08-L-Yellow		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
7	WT08-L-Purple		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
8	WT08-L-Black		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
9	WT08-M-Yellow		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
10	WT08-M-Purple		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
11	WT08-M-Black		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
12	WT08-S-Yellow		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
13	WT08-S-Purple		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
14	WT08-S-Black		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
15	WT08-XS-Yellow		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
16	WT08-XS-Purple		Top	simple	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
17	WT08		Top	configurable	Default/Collections|Default/Women|Default/Women/Tops|Default/Women/Tops/Bras & Tanks|Default/Promotions|Default/Promotions/Women Sale|Default/Collections/Perf
18					

Exported Configurable Product Data

Complex Data Attributes

ATTRIBUTE	DESCRIPTION
CONFIGURABLE PRODUCTS	
`configurable_variation_labels`	Labels that identify product variations. For example: Choose Color: Choose Size:
`configurable_variations`	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|sku=sku-red-m,color=red,size=m,price=20.88,display=1,image=/pub/media/import/image2.png

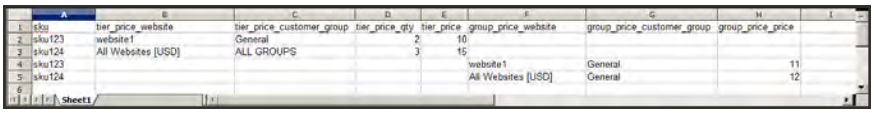
[1] Data that is associated with multiple product options.

Complex Data Attributes (cont.)

ATTRIBUTE	DESCRIPTION
GROUPED PRODUCTS	
`associated_skus`	Identifies the SKUs of the individual products that make up the group.
BUNDLE PRODUCTS	
`bundle_price_type`	Determines if the price of a bundle item is fixed or dynamic.
`bundle_sku_type`	Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.
`bundle_weight_type`	Determines if the weight of a bundle item is variable or fixed.
`bundle_values`	Describes teach value associated with a bundle option. For example: name=Bundle Option One,type=dropdown; required=1, sku=sku-option2,price=10, price_type=fixed

Advanced Pricing

Advanced Price Import/Export allows you to quickly update pricing information for product groups and tier prices. The process to import and export advanced price data is the same as any other entity type. The sample CSV file contains tier and group prices for each product type that supports advanced pricing. Making changes to advanced pricing does not affect the rest of the product record.



	A	B	C	D	E	F	G	H	I
1	sku	tier_price_website	tier_price_customer_group	tier_price_qty	tier_price	group_price_website	group_price_customer_group	group_price_price	
2	sku123	website1	General	2	10				
3	sku124	All Websites [USD]	ALL GROUPS	3	15				
4	sku123					website1	General	11	
5	sku124					All Websites [USD]	General	12	
6									

Advanced Price Sample File

Advanced Pricing Attributes

ATTRIBUTE	DESCRIPTION
`sku`	(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 A SKU longer than 64 characters will cause import to fail.
`tier_price_website`	The website code identifies each website where tier pricing is available. For example: website1 All Websites [USD]
`tier_price_customer_group`	Identifies the customers groups where tier pricing is available. For example: ALL GROUPS NOT LOGGED IN General Wholesale Retailer
`tier_price_qty`	The quantity of the product that must be ordered to receive the tier price discount.
`tier_price`	The discounted tier price of the product. For bundle products, tier price is calculated as a percentage.

Advanced Pricing Attributes (cont.)

ATTRIBUTE	DESCRIPTION
`group_price_website`	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]
`group_price_customer_group`	Identifies the customers groups where group pricing is available. For example: NOT LOGGED IN General Wholesale Retailer
`group_price`	The discounted group price of the product. For bundle products, group price is calculated as a percentage.

Customer Attribute Reference

The following tables list the attributes from a typical export of the Customers Main File and Customer Addresses. The installation that was used to export this data has two websites and several store views, with the sample data installed.

Each attribute, or field, is represented in the CSV file as a column, and customer records are represented by rows. Columns that begin with an underscore are service entities that contain properties or complex data.

Customers Main File

ATTRIBUTE	DESCRIPTION
email	
_website	
_store	
confirmation	
created_at	
created_in	
disable_auto_group_change	
dob	
firstname	
gender	
group_id	
lastname	
middlename	
password_hash	
prefix	
rp_token	

Customers Main File (cont.)

ATTRIBUTE	DESCRIPTION
rp_token_created_at	
store_id	
suffix	
taxvat	
website_id	
password	

Customer Addresses

ATTRIBUTE	DESCRIPTION
_website	
_email	
_entity_id	
city	
company	
country_id	
fax	
firstname	
lastname	
middlename	
postcode	
prefix	
region	
region_id	

Customer Addresses (cont.)

ATTRIBUTE	DESCRIPTION
street	
suffix	
telephone	
vat_id	
vat_is_valid	
vat_request_date	
vat_request_id	
vat_request_success	
_address_default_billing_	Identifies the default billing address. A value of 1 indicates that the address is the default billing address of the customer. Values: 1 / 0
_address_default_shipping_	Identifies the default shipping address. A value of 1 indicates that the address is the default shipping address of the customer. Values: 1 / 0

CHAPTER 80:

Integrations

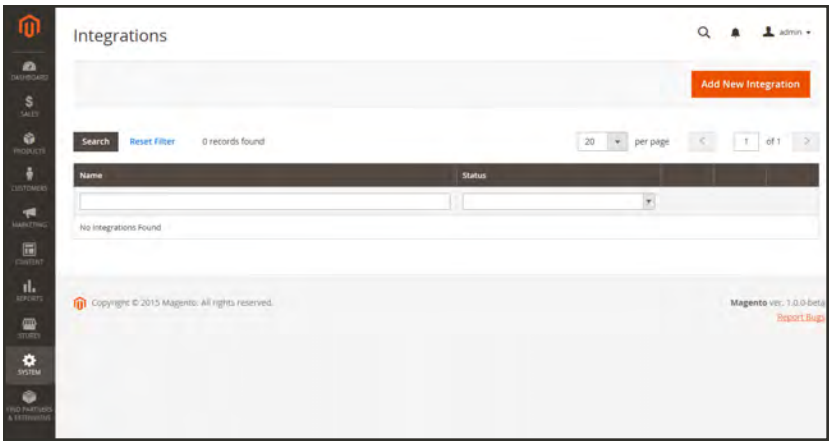
Establishes the location of Oauth credentials and redirect URL for third-party integrations, and identifies the available API resources that are needed for the integration. The following path uses our Web APIs to onboard a merchant to a third-party SaaS platform.

Onboarding Workflow

1. **Authorize the integration.** Go to the system/integration page, 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..



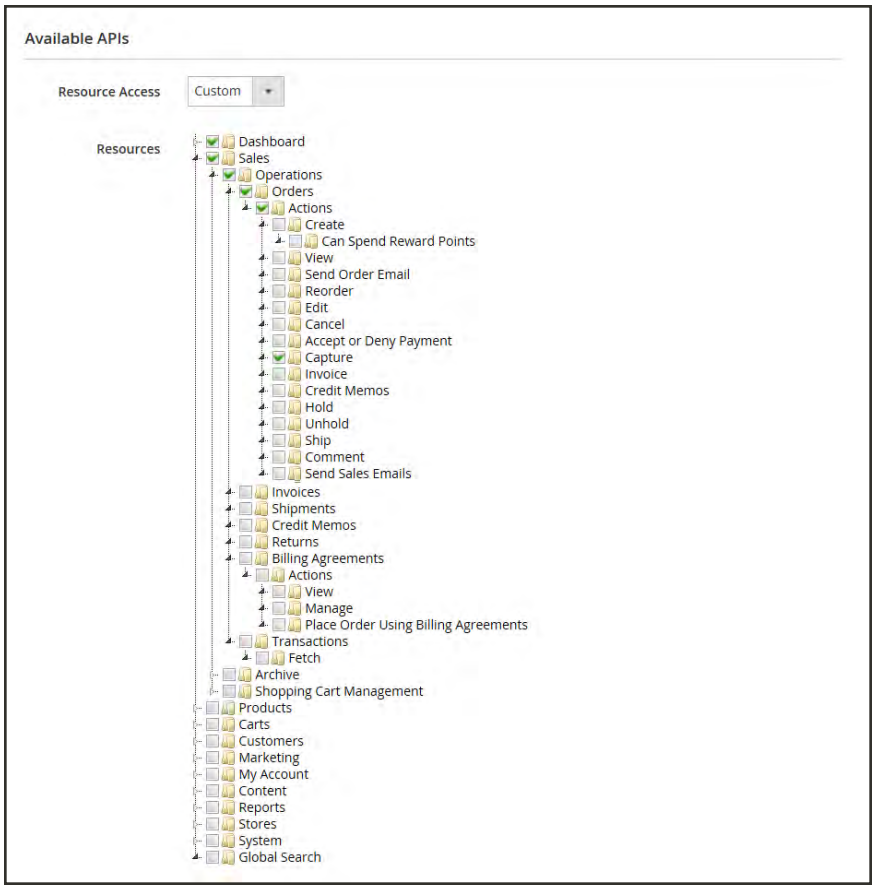
Integrations

To add a new integration:

1. On the Admin sidebar, tap **System**. Then under **Extensions**, choose **Integrations**.
2. Enter the following Integration Info:
   a. Enter the **Name** of the integration, and the contact **Email** address.
   b. Enter the **Callback URL** where Oauth credentials can be sent when using Oauth for token exchange. We strongly recommend using https://.
   c. Enter the **Identity Link URL** to redirect the users to a third-party account with these Magento integration credentials.

New Integration

3. In the panel on the left, choose **API**. Then, do the following:
   a. Set **Resource Access** to one of the following:
      - All
      - Custom
   b. For custom access, mark the checkbox of each resource that is needed:



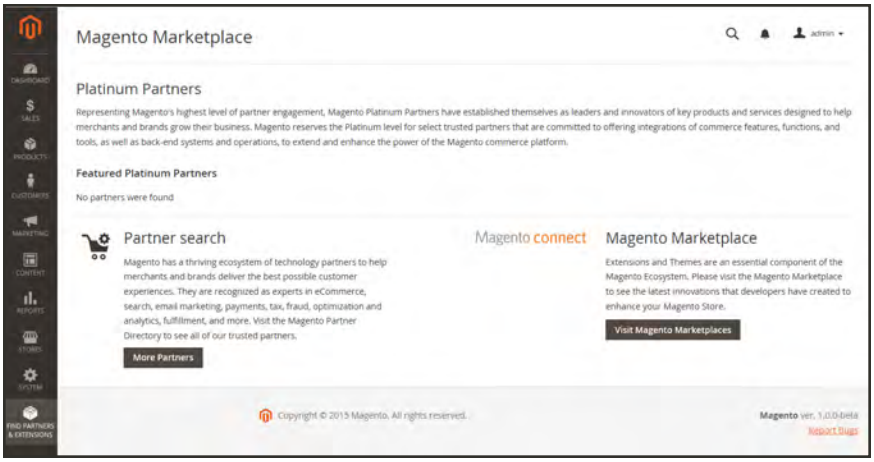
Resources Needed for Custom Access

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

Magento Marketplace

Magento Marketplace is the next generation of the world's largest eCommerce application store, offering merchants a curated selection of solutions, and providing qualified developers the tools, platform, and prime location to build a thriving business.

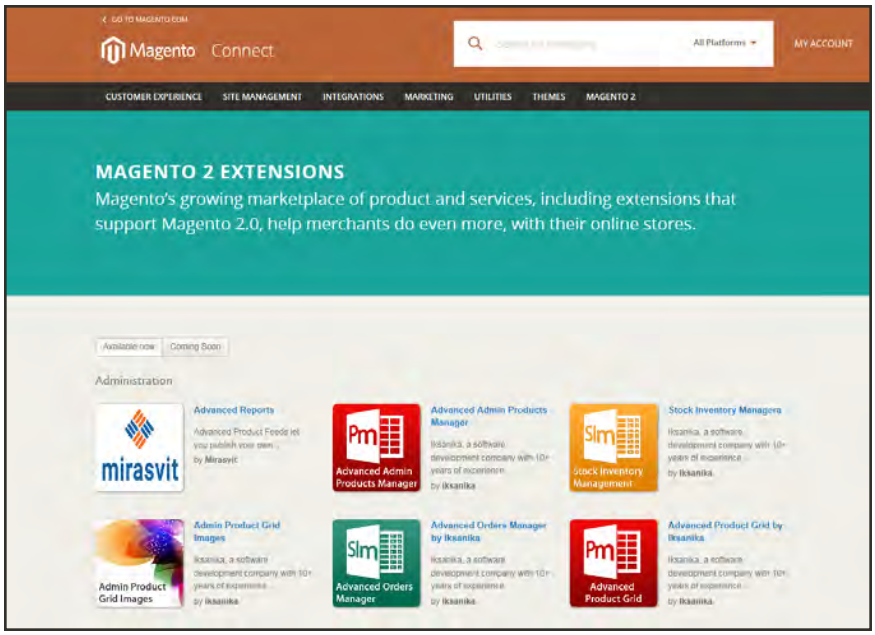
To learn more, **Find Partners & Extensions** in the Admin sidebar.



Magento Marketplace

Magento Connect

Magento Connect is Magento's original marketplace for Magento extensions. There are hundreds of extensions and themes available from all over the world. Magento out-of-the-box supports a few of the most popular ones. However, community members are developing and publishing new extensions in order to extend Magento with various new features.



Magento Connect

Notes

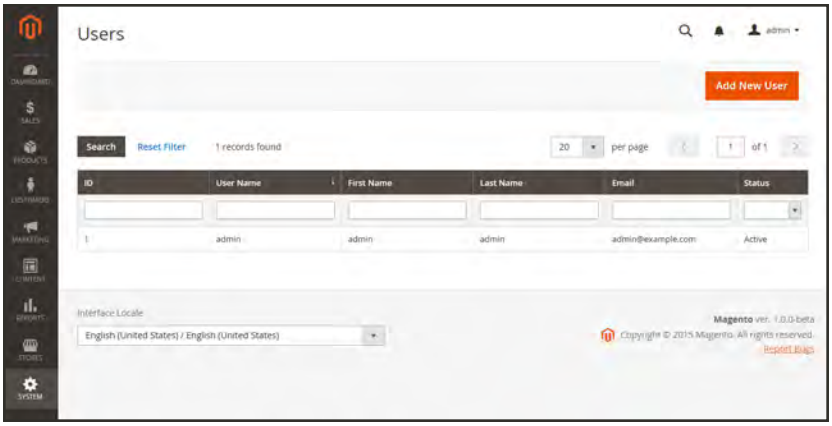
CHAPTER 81:

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.



All Users

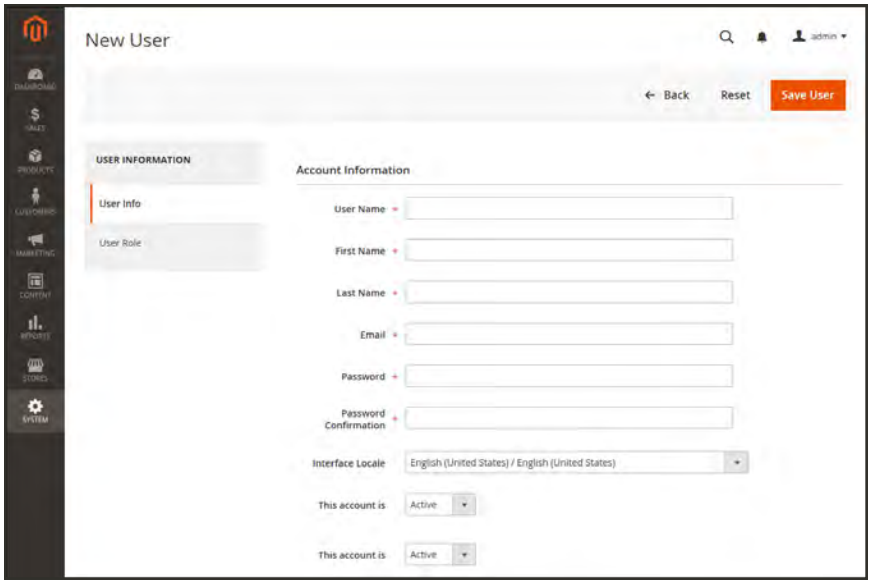
Adding Users

When your store is first installed, your login credentials give you full administrative access. As a best practice, one of the first things you should do is to create another user account with full Administrator permissions. That way, you can use one account for your everyday Administrative activities, and reserve the other as a "Super Admin" account in case you forget your regular credentials or they somehow become unusable.

If there are others on your team, or service providers who need access, you can create a separate user account for each, and assign restricted access. To limit the websites or stores that admin users can access when they log in, you must first create a role with limited scope and access to resources. Then, you can assign the role to a specific user account. Admin users who are assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot make changes to any global settings or data.

Step 1: Create a New User

1. On the Admin sidebar tap **System**. Then under **Permissions**, choose **All Users**.
2. In the upper-right corner, tap **Add New User**.
3. In the Account Information section, do the following:



New User Account Information

a. Enter the **User Name** for account.

The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is "John," you can also log in as "john."

b. Complete the following information:

- First Name
- Last Name
- Email address

  This email address must be different from the one that is associated with your original Admin account.

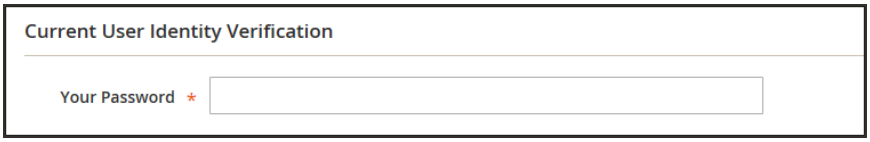
c. Assign a **Password** to the account.

The password should be seven or more characters long, and include both letters and numbers.

d. In the **Password Confirmation** box, repeat the password to make sure it was entered correctly.

e. If your store has multiple languages, set **Interface Locale** to the language to be used for the Admin interface.

4. Set **This Account is** to "Active."
5. Under Current User Identity Verification, enter **Your Password**.

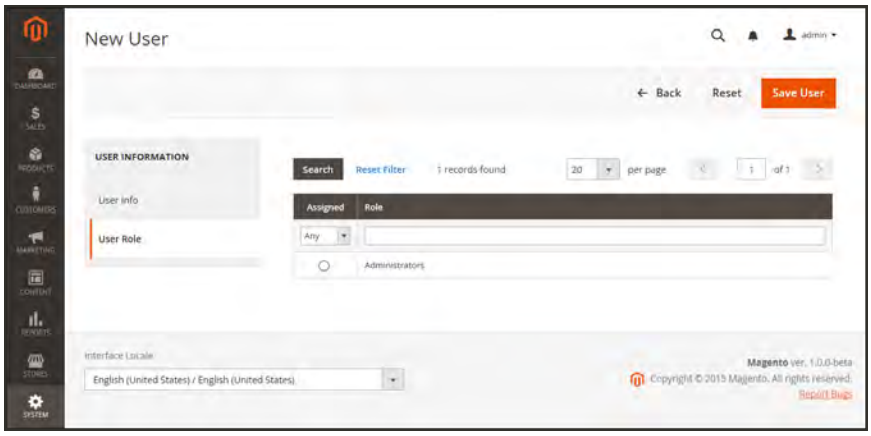


Current User Identity Verification

Step 2: Define the Role

1. In the panel on the left, choose **User Role**. The grid lists all the existing roles. Initially, the only role available is Administrators.
2. In the Assigned column, select the **Administrators** option.
3. Tap **Save User**.

   You now have two accounts with Administrator access.



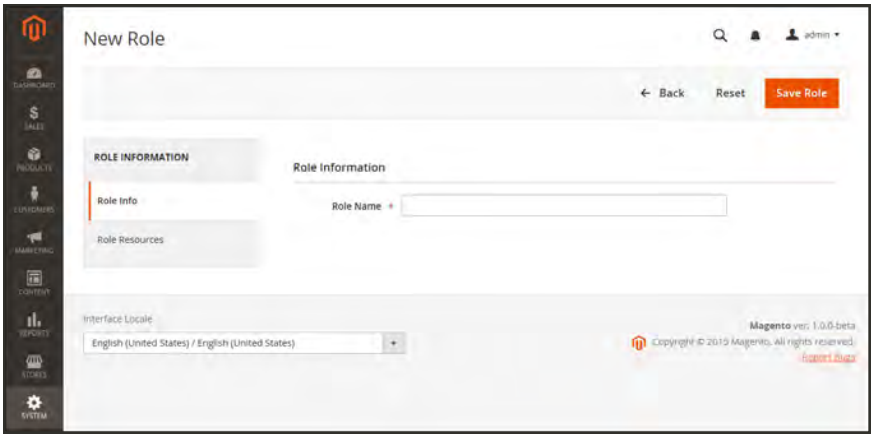
Add New User Role

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. Permission can be granted to the following resources:

- Price Resources
- Promotion Resources
- Product Resources

After the role is established you can add new users and assign the restricted role to grant them limited access to the Admin.

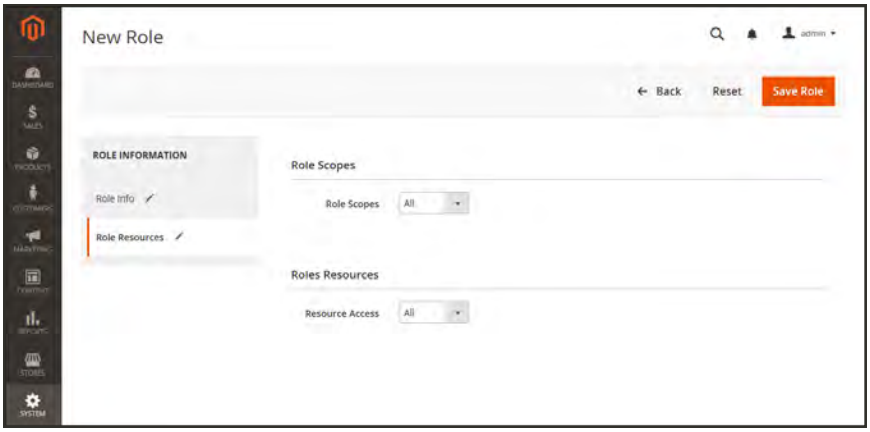


Role Name

Step 1: Define the Role

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
2. In the upper-left corner, tap **Add New Role**.

3. In the Role Information section, enter a descriptive **Role Name**.
4. In the panel on the left, choose **Role Resources**.
5. Set **Role Scopes** to "Custom." Then, mark the checkbox of each website and view that users with this role can access.



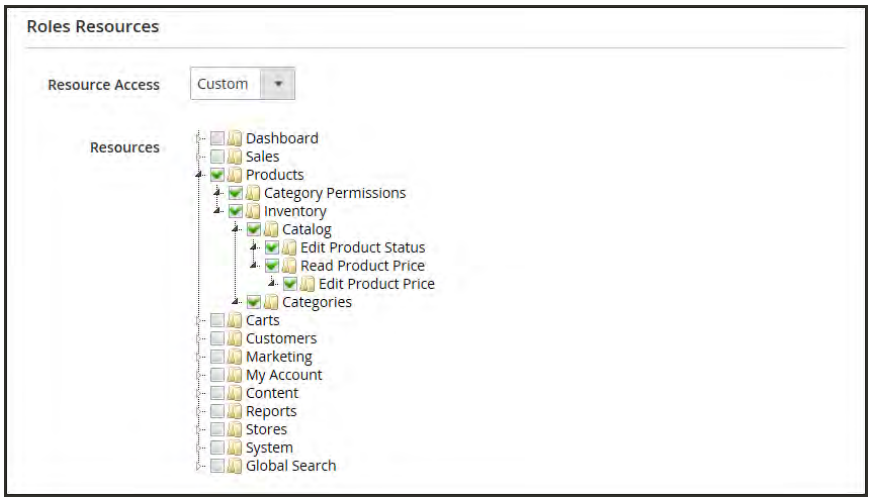
Role Scopes

Step 2: Assign Resources

1. In the Roles Resources tree, mark the checkbox of each Admin **Resource** that you want the role to be able to access.

   In the tree, the color of each node changes from white to gray each time the section is expanded or collapsed. If the node is collapsed, you can click the node to show additional resources.

   > **Important!** 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.



Role Resources Assigned

2. (Optional) In the panel on the left, choose **Role Users**. Then, assign additional Administrator user accounts to the new role.

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

   The role now appears in the grid, and can be assigned to new user accounts.

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Alternate Media Storage

Magento Enterprise Edition 2.0 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.

Using a Database for Media Storage

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.

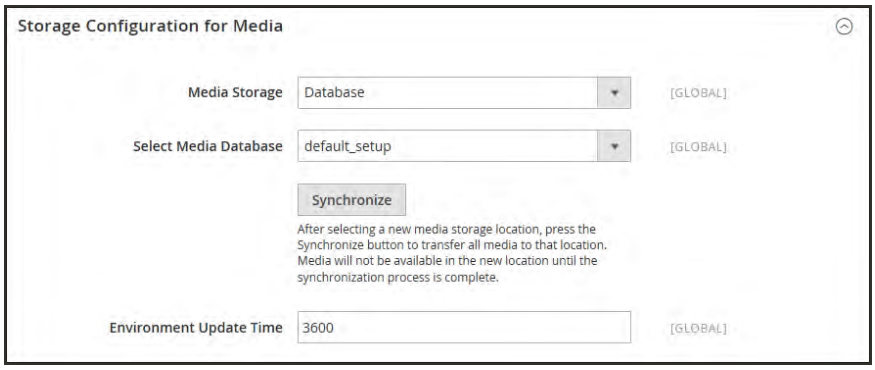
3. **System locates media in database.** If the media is not found in the file system, a request for the media is sent to the database that is specified in the configuration.

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:



Media Storage Configuration for Database

   a. Set **Media Storage** to "Database."
   b. Set **Select Media Database** to the database you want to use.
   c. Tap **Synchronize** to transfer the existing media to the newly selected database.
   d. Enter the **Environment Update Time** in seconds.
5. When complete, tap **Save Config**.

Using a Content Delivery Network

Storing media files in a CDN is another alternative supported in Magento. There is no full integration with a specific CDN, and you are responsible for choosing and configuring a CDN on your own. After configuring the CDN, you must complete the configuration from the Admin. The changes can be made at either the global or website level. When a CDN isused 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.

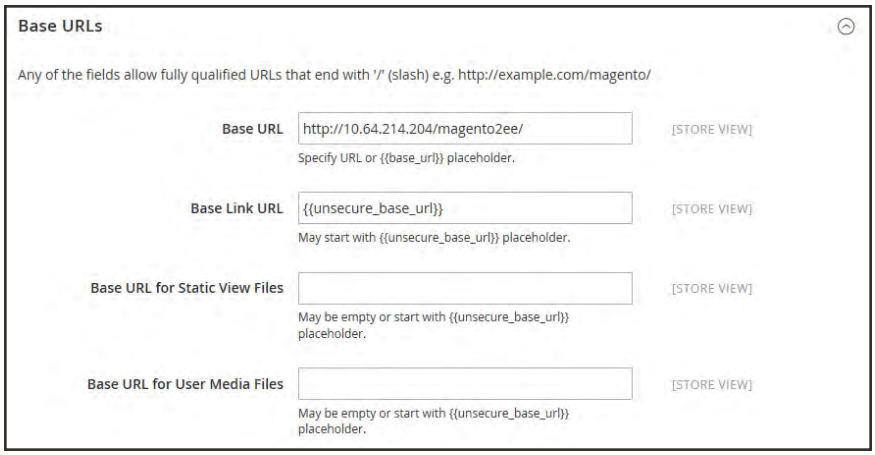
2. **Request sent to CDN; images found and served.** The request is sent first to the CDN. If the CDN has the images in storage, it serves the media files to the customer's browser.

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**.
1. In the panel on the left under **General**, choose **Web**.
2. In the upper-left corner, set **Store View** as needed.
3. Expand the **Base URLs** section. Then, do the following:



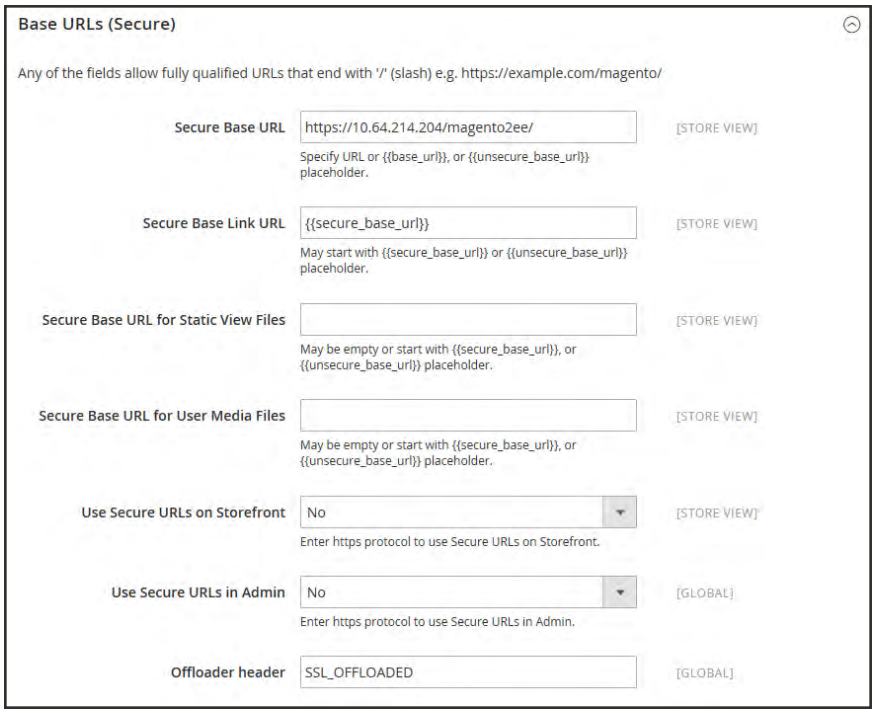
Base URLs

a. Update the **Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.

b. Update the **Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

4. 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}}`

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

CHAPTER 83:

Security

In this section of the guide, you will learn security best practices, how to manage Admin sessions and credentials, implement CAPTCHA, and manage website restrictions.

Security Best Practices

All eCommerce sites are attractive targets to hackers because of the personal and payment information that is required to complete a sale. Even if the system does not directly process credit card transactions, a compromised site might reroute customers to a false page, or alter an order before it is transmitted to the payment processor.

A compromised site can have long-term consequences for both customers and merchants. Customers might suffer financial loss and identify theft, while merchants can face damage to their reputations, loss of merchandise, higher processing fees, revoked privileges with financial institutions, and the threat of lawsuits.

This guide outlines a multifaceted approach to improve the security of your Magento installation. Although there is no single way to eliminate all security risks, there are many things that you can do to make your site a less attractive target. It is crucial for hosting providers, system integrators, and merchants to work together to establish and maintain a secure environment, implement methods for early detection, and determine a plan of action in the event of a breach.

Start Right

Work with reliable hosting providers and solution integrators. When evaluating their qualifications, ask about their approach to security. Verify that they have a secure software development life cycle in accord with industry standards such as The Open Web Application Security Project (OWASP), and that they test their code for security issues.

If you are starting a new site, consider launching the entire site over HTTPs. Taking the lead on this issue, Google now uses HTTPs as a ranking factor.

For an existing installation, plan to upgrade the entire site to run over to a securely encrypted, HTTPs channel. Although you will need to create redirects from HTTP to HTTPs, the effort will future-proof your site. We recommend that you plan to make this change sooner, rather than later.

Protect the Environment

Protecting the environment is the most critical aspect of ensuring the security of your store. Keep all software on the server up to date, and apply security patches as recommended. This applies not only to Magento, but to any other software that is installed on the server, including database software and other websites that use the same server. Any system is only as secure as the weakest link.

Server Environment

- Make sure that the server operating system is secure. Work with your hosting provider to ensure that there is no unnecessary software running on the server.
- Use only secure communications protocol (SSH/SFTP/HTTPS) to manage files, and disable FTP.
- Magento includes `.htaccess` files to protect system files when using the Apache web server. If you use a different web server such as Nginx, make sure that all system files and directories are protected. For an sample Nginx configuration, see: magento-nginx.conf on GitHub.
- Use strong and unique passwords, and change them periodically.
- Keep the system up to date, and immediately install patches when new security issues are discovered.
- Closely monitor any issues that are reported for software components used by your Magento installation, including the operating system, MySQL database, PHP, Redis (if used), Apache or Nginx, Memcached, Solr, and any other components in your specific configuration.
- Limit access to `cron.php` file to only required users. For example, restrict access by IP address. If possible, block access completely and execute the command using the system cron scheduler.

Advanced Techniques

- Automate the deployment process, if possible, and use private keys for data transfer.
- Limit access to the Magento Admin by updating the whitelist with the IP address of each computer that is authorized to use the Admin and Magento Connect downloader. For examples of how to whitelist IP addresses, see: Secure Your Magento Admin.
- Do not install extensions directly on a production server.

  To disable the Magento Connect downloader on the production site, either remove or block access to the `/downloader` directory. You can also use the same whitelisting methods.
- 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 LasstPass, 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.

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.

Your Magento Installation (cont.)

- 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, and CAPTCHA.

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 email.
- 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.
- ☑ (Magento Enterprise only) 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.

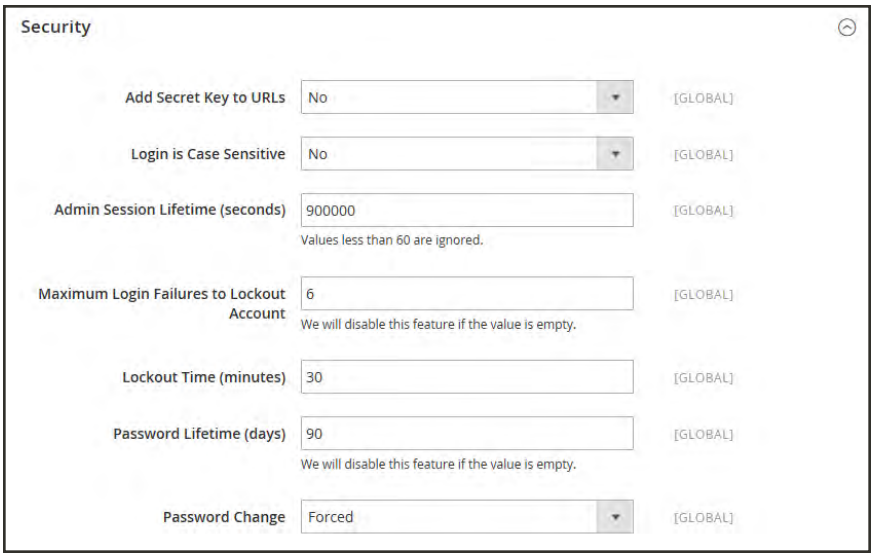
Acknowledgments

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_gimp for his security presentation, Being Hacked is Not Fun.
- Willem de Groot for providing a sample Nginx configuration.

Admin Security

For increased security, you can configure the length of keyboard inactivity before the current session expires, and require the user name and password to be case-sensitive. For additional security, the Admin login can be configured to require a CAPTCHA.



Security

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**. Then, do the following:
   a. To append secret key to the Admin URL to protect against exploits, set **Add Secret Key to URLs** to "Yes." This setting is enabled by default.
   b. To require the user name and password to have the same upper-and lowercase characters as those that are saved in the system, set **Login is Case Sensitive** to "Yes."
   c. To require Admin users to sign in again after a period of keyboard inactivity, set **Admin Session Lifetime (seconds)** to a number greater than 60. To not set a limit on the length of a session, leave the field blank.
   d. In the **Maximum Login Failures to Lockout Account** field, enter the number of times Admin users can try to log in before their accounts are locked.
   e. In the **Lockout Time (minutes)** field, enter the number of minutes an Admin account is locked before the user can try to log in again.
   f. In the **Password Lifetime (days)** field, enter the number of days an Admin password can be used before it expires.

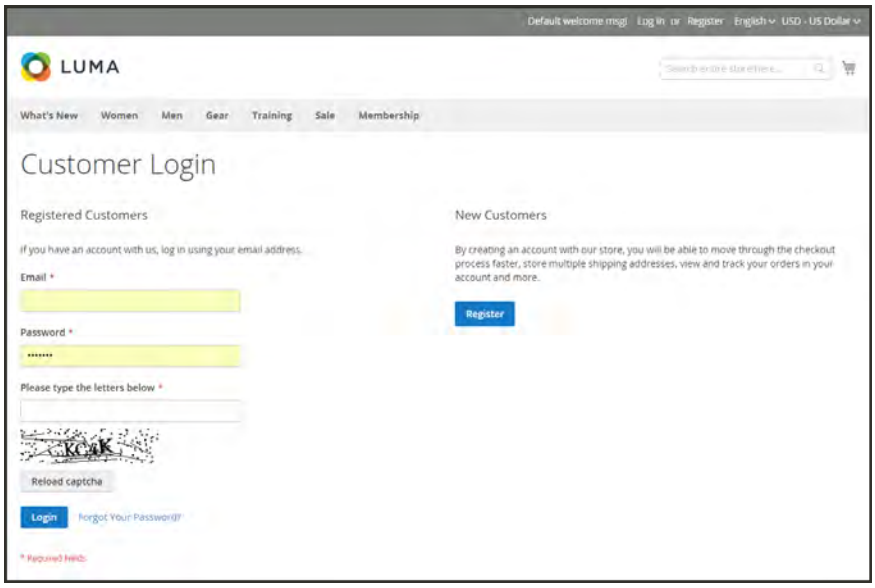
g. If you want to require Admin users to change their passwords before they expire, set **Password Change** to "Forced."

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

CAPTCHA

A CAPTCHA is a visual device that ensures that a human being, rather than a computer, is interacting with the site. CAPTCHA is an acronym for "Completely Automated Public Turing test to tell Computers and Humans Apart," and can be used for both Admin and customer account logins.

You can reload the CAPTCHA as many times as is necessary by clicking the Reload icon in the upper-right corner of the image. The CAPTCHA is fully configurable and can be set appear every time, or only after a number of failed login attempts.



Customer Login with CAPTCHA

Admin CAPTCHA

For an extra level of security, you can add a CAPTCHA to the Admin Sign In and Forgot Password page. Administrator users can reload the displayed CAPTCHA by clicking the Reload icon in the upper-right corner of the image. The number of reloads is unlimited.

Admin Sign In with CAPTCHA

To configure an Admin CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. In the upper-right corner, set **Store View** to "Default."
4. Expand the **CAPTCHA** section, and do the following:
   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.
   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.

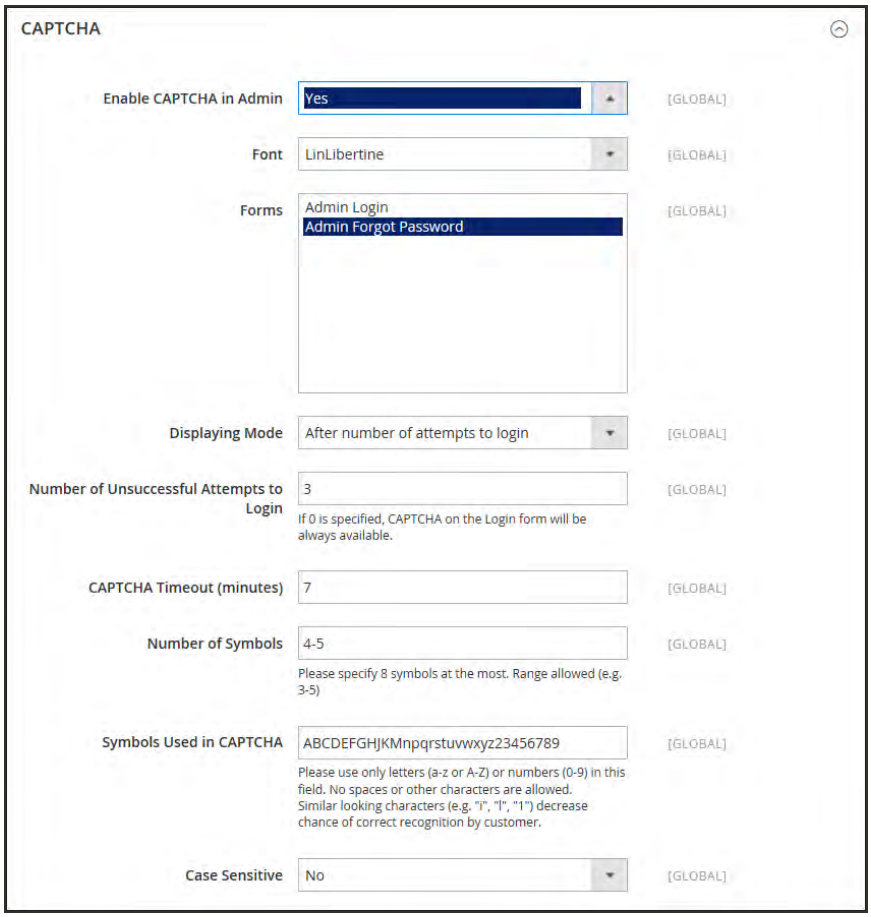
f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page.

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 upper-and lowercase characters exactly as shown set **Case Sensitive** to "Yes."

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

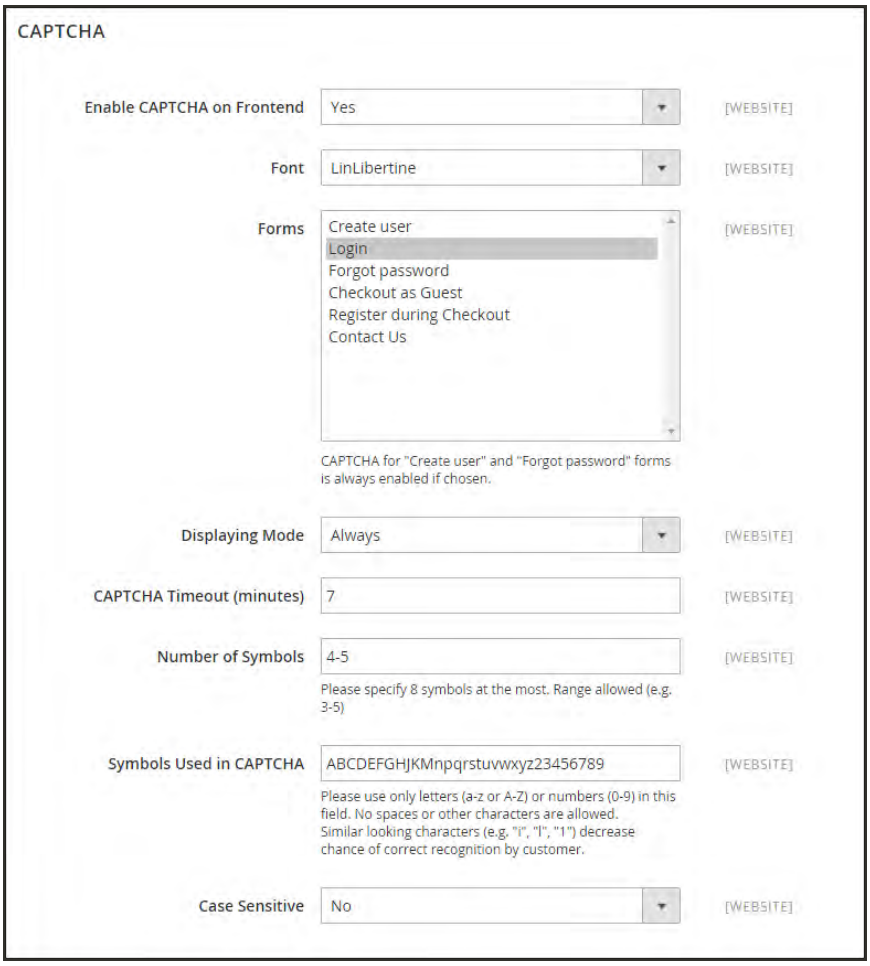


Admin CAPTCHA Configuration

Customer CAPTCHA

Customers can be required to enter a CAPTCHA each time they log in to their accounts, or only after several unsuccessful attempts to log in. CAPTCHA can be used for several forms in the storefront including:

- Create User
- Login
- Forgot Password
- Checkout as Guest
- Register During Checkout
- Contact Us



Customer CAPTCHA Configuration

To configure a Storefront CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand the **CAPTCHA** section, and do the following:
   a. Set **Enable CAPTCHA on Frontend** to "Yes."
   b. Enter the name of the Font to be used for the CAPTCHA symbols. 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.
   c. Choose the **Forms** where CAPTCHA is to be used. Options include:

- Create User
- Login
- Forgot Password
- Checkout as Guest
- Register during Checkout

d. Set **Displaying Mode** to one of the following:

Always	CAPTCHA is always required to access the selected form(s).
After number of attempts to login	Enter the number of login attempts before the CAPTCHA appears. A value of 0 (zero) is similar to "Always." When selected, the number of unsuccessful login attempts appears. This option does not apply to the Forgot Password form, which always display the CAPTCHA, if enabled,

e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.

f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page to generate a new CAPTCHA.

g. Enter the **Number of Symbols** in the CAPTCHA, up to eight. For a variable number of symbols that change with each CAPTCHA, enter a range such as 5-8.

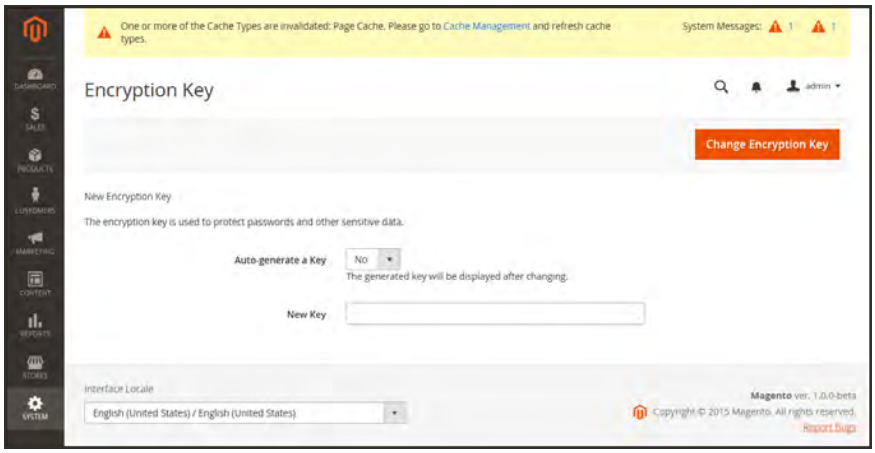
h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.

i. To require that the user enter the upper-and lowercase characters exactly as shown set **Case Sensitive** to "Yes."

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

Encryption Key

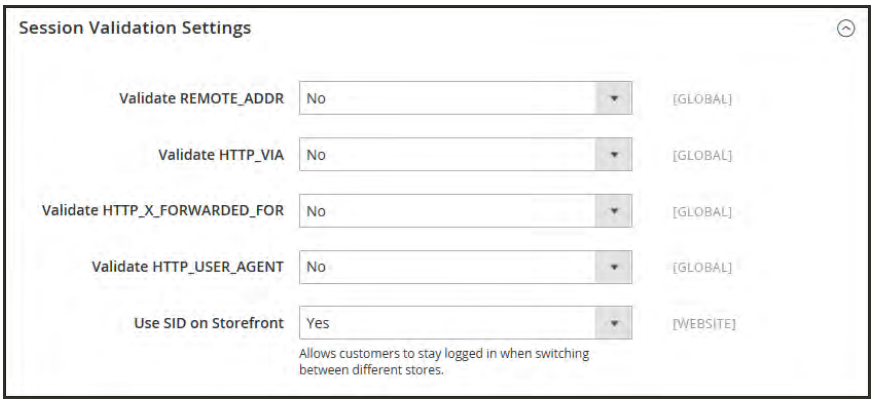
The encryption key is used to protect passwords and other sensitive data. During the Magento setup, you have the option of generating an encryption key, or using an another.



Encryption Key

Session Validation

Magento Enterprise 2.0 allows you to validate session variables as a protective measure against possible session fixation attacks, or attempts to poison or hijack user sessions. The Session Validation Settings determine how session variables are validated during each store visit, and if the session ID is included in the URL of the store.



Session Validation Settings

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**.

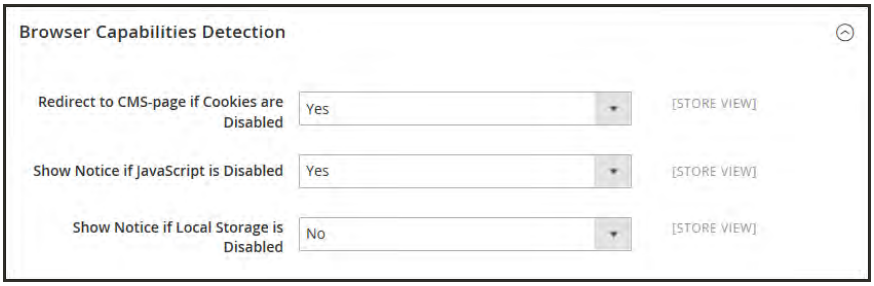
Browser Capabilities Detection

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 "CMS No Cookies Page, " which explains how to make the recommended settings with most browsers.
- If the browser's privacy settings disallow JavaScript, you can configure the system to display the following message above the header of every page:

To configure browser capabilities detection:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand the **Browser Configuration Detection** section, and do the following:
   a. To display instructions that explain how to configure the browser to allow cookies, set **Redirect to CMS-page if Cookies are Disabled** to "Yes."
   b. To display a banner above the header when JavaScript is disabled in the user's browser, set **Show Notice if JavaScript is Disabled** to "Yes."



Browser Capabilities Detection

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

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.

Contents

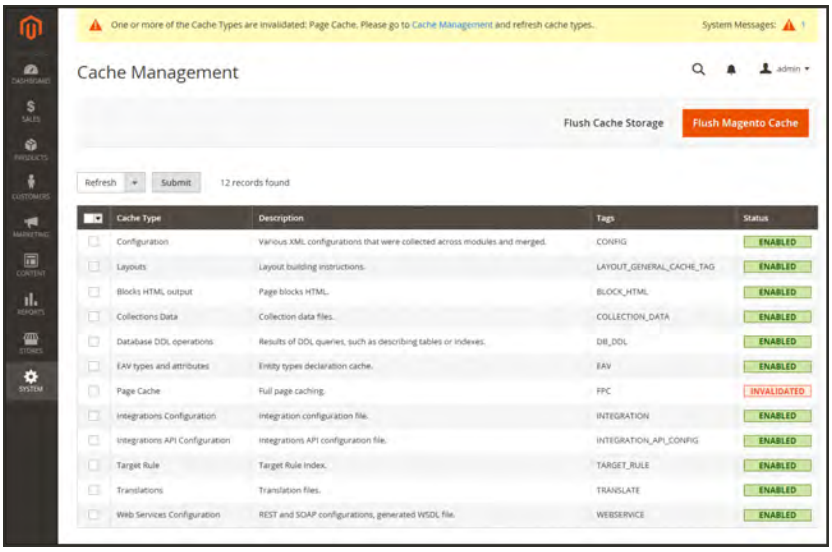
CHAPTER 84:

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.



Cache Management

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.

Control Descriptions

CONTROL	DESCRIPTION
Mass Actions	Marks the checkbox of multiple caches. Options include: Select All — Marks the checkbox of all caches. Unselect All — Clears the checkbox of all caches. Select Visible — Marks the checkbox of all visible caches. Unselect Visible — Clears the checkbox of all visible caches.
Actions	Determines the action to be applied to all selected caches. Options include: Enable — Enables all selected caches. Disable — Disables all selected caches. Refresh — Refreshes all selected caches.
Submit	Applies the action to all selected caches.

Button Descriptions

BUTTON	DESCRIPTION
Flush Magento Cache	Removes all items in the default Magento cache (var/cache), according to their associated Magento tags.
Flush Cache Storage	Removes all items from the cache, regardless of Magento tag. If your system uses an alternate cache location, any cached files used by other applications are removed in the process.
Flush Catalog Images Cache	Removes all automatically resized and watermarked catalog images that are stored at: media/catalog/product/cache. If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
Flush JavaScript/CSS Cache	Removes the merged copy of JavaScript and CSS files from the cache. If recent changes to the style sheet or JavaScript aren't reflected in the store, try flushing the JavaScript/CSS cache and refreshing your browser.
Flush Static Files Cache	Removes preprocessed view files and static files.

Cache Descriptions

CACHE	DESCRIPTION
Configuration	Various XML configurations that were collected across modules and merged. Associated Tag: `CONFIG` System: config.xml local.xml Module: config.xml
Layouts	Layout building instructions. Associated Tag: `LAYOUT_GENERAL_CACHE_TAG`
Blocks HTML output	Page blocks HTML. Associated Tag: `BLOCK_HTML`
Collections Data	Collection data files. Associated Tag: `COLLECTION_DATA`
Database DDL operations	Results of DDL queries, such as describing tables or indexes. Associated Tag: `DB_DDL`
EAV types and attributes	Entity types declaration cache. Associated Tag: `EAV`
Page Cache	Full page caching. Associated Tag: `FPC`
Integrations Configuration	Integration configuration file. Associated Tag: `INTEGRATION`
Integrations API Configuration	Integrations API configuration file. Associated Tag: `INTEGRATION_API_CONFIG`
Target Rule	The target rule index. Associated Tag: `IARGET_RULE`
Translations	Translation files. Associated Tag: `TRANSLATE`
Web Services Configuration	REST and SOAP configurations, generated WSDL file. Associated Tag: `WEBSERVICE`

Full Page Cache

Magento Enterprise Edition 2.0 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.

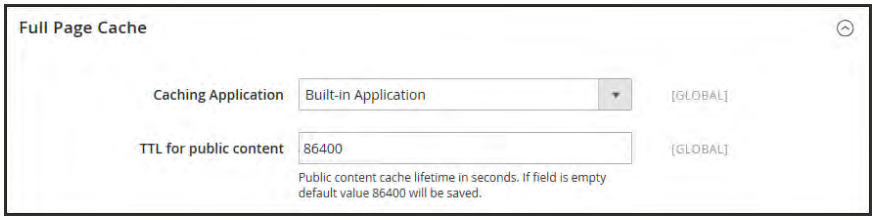
> We currently recommend Full Page Cache to be used only in a development environment.

Cached content can be used to process the requests from similar types of visits. As a result, pages shown to a casual visitor might differ from those shown to a customer. For the purposes of caching, each visit is one of three types:

Non-sessioned	During a non-sessioned visit, a shopper views pages, but does not interact with the store. The system caches the content of each page viewed, and serves them to other non-sessioned shoppers.
Sessioned	During a sessioned visit, shoppers who interact with the store—through activities such as comparing products or adding products to the shopping cart—are assigned a session ID. Cached pages that are generated during the session are used only by that shopper during the session.
Customer	Customer sessions are created for those who have registered for an account with your store and shop while logged in to their accounts. During the session, customers can be presented with special offers, promotions, and prices that are based on the customer group to which they are assigned.

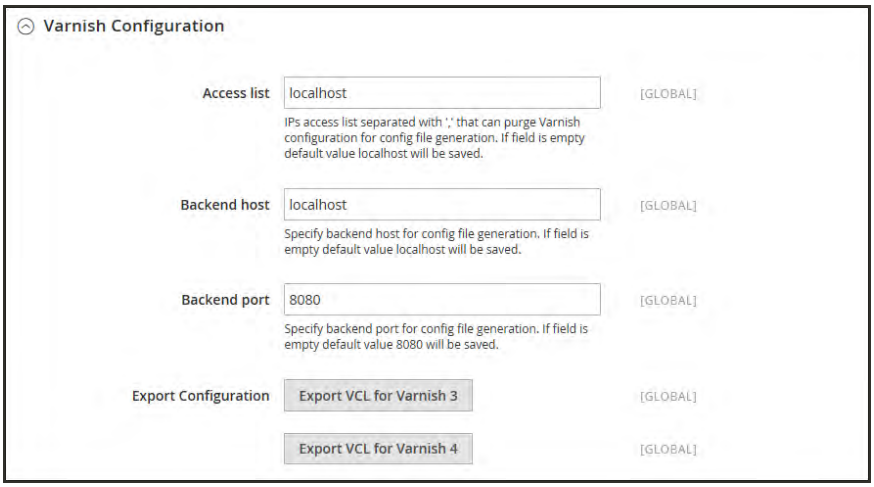
To configure the full-page cache:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Full Page Cache** section.



Full Page Cache

4. Set **Caching Application** to one of the following:
   - Built-in Application
   - Varnish Caching
5. To set the time-out for the page cache, enter the **TTL for public content**. (The default value is 86400)
6. If using Varnish, complete the **Varnish Configuration** section as follows:
   a. In the **Access list** field, enter the IP addresses that can purge the Varnish configuration to generate a config file. Separate multiple entries with a comma. The default value is "localhost."
   b. In the **Backend host** field, enter the IP address of the backend host that generates config files. The default value is "localhost."
   c. In the **Backend port** field, identify the backend port that is used to generate config files. The default value is: "8080."
   d. To export the configuration as a `varnish.vcl` file, tap the button for the version of Varnish that you use.
      - Export VCL for Varnish 3
      - Export VCL for Varnish 4



Varnish Configuration

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

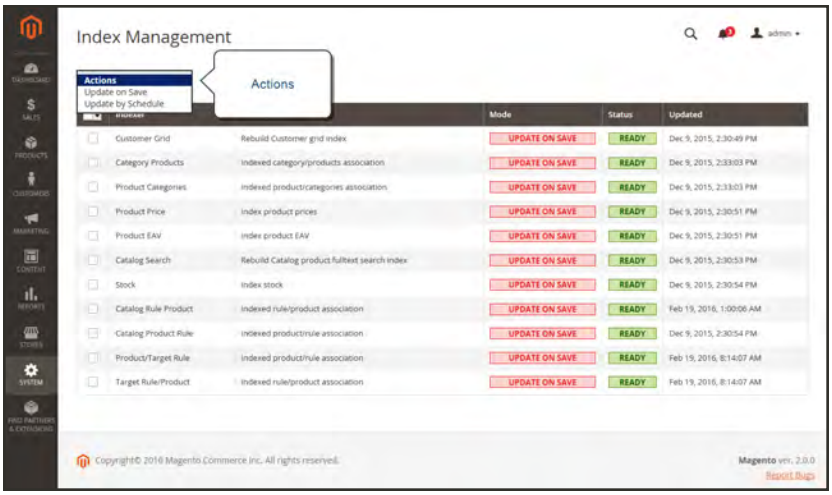
CHAPTER 85:

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. Reindexing is performed as a background process, and your store remains accessible during the processes.

Reindexing the data 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. Reindexing is performed as a background process that is scheduled as a cron job, and your store remains accessible during the processes. A system message appears if a cron job is not available to update any indexers that become invalid.



Index Management

Index Management has a slightly different presentation for the following configurations:

- Solr full-text catalog search
- Flat product catalog

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.

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
4. Tap **Submit** to apply the change to each selected indexer.

Column Descriptions

COLUMN	DESCRIPTION	
Indexer	The name of the indexer.	
Description	A description of the indexer.	
Mode	Indicates the current update mode for each indexer. Options:	
	Update on Save	The index is set to update whenever a change is saved.
	Update on Schedule	The index is set to update on schedule according to a cron job.
Status	Displays one of the following:	
	Ready	The index is up-to-date.
	Scheduled	Reindexing is scheduled to take place.

Column Descriptions (cont.)

COLUMN	DESCRIPTION	
	Running	Reindexing is currently running.
	Reindex Required	A change has been made that requires reindexing, but the indexers cannot be updated automatically. Check to see if cron is available and configured correctly.
Updated	Indicates the date and time an index was last updated.	

Index Trigger Events

Events that Trigger Reindexing

Reindexing Triggers

INDEX TYPE	REINDEXING EVENT
Product Prices	Add customer group Change configuration settings
Flat catalog[1] product data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Flat catalog category data	Add store Add store group Add, edit, or delete attribute (for searching and filtering)
Catalog category/product index	Add, edit, or delete products (single, mass, and import) Change product-to-category relations Add, edit, or delete categories Add or delete stores Delete store groups Delete websites
Catalog search index	Add, edit, or delete products (single, mass, and import) Add or delete stores Delete store groups Delete websites
Stock status index	Change inventory configuration settings.
Category permissions index	Add store, add store group, add or delete or update attribute (for searching and filtering)

[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

ACTION	RESULT	TO CONTROL
Creating a new store, new customer group, or any action listed in “Actions that Cause a Full Reindex.”	Full reindex	Full reindexing is performed on the schedule determined by your Magento cron job. .
Bulk loading of items in the following ways: • Magento import/export • Direct SQL query • Any other method that directly adds, changes, or deletes data.	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.
Changing scope (for example, from global to website)	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.

Events that Trigger Full Reindexing

Full Reindex Triggers

INDEXER	EVENT
Catalog Category Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: • Searchable or visible in advanced search • Filterable • Filterable in search • Used for sorting Change an existing attribute to be any of the preceding. Enable flat category frontend options

Full Reindex Triggers (cont.)

INDEXER	EVENT
Catalog Product Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: • Searchable or visible in advanced search • Filterable • Filterable in search • Used for sorting Change an existing attribute to be any of the preceding. Enable flat category frontend options
Stock status indexer	When the following Catalog Inventory options change in the system configuration: Stock Options — Display Out of Stock Products Product Stock Options — Manage Stock
Price Indexer	Adding a new customer group. When any of the following Catalog Inventory options change in the system configuration: Stock Options — Display Out of Stock Products Product Stock Options — Manage Stock Price — Catalog Price Scope
Category or Product Indexer	Create or delete a store view Delete a store Delete a website

CHAPTER 86:

Backups

Magento Enterprise Edition 2.0 gives you the ability to back up different parts of the system—such as the file system, database, and media files—and to rollback 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 back up before installing extensions and updates.

Restrict Access to Backup Tools

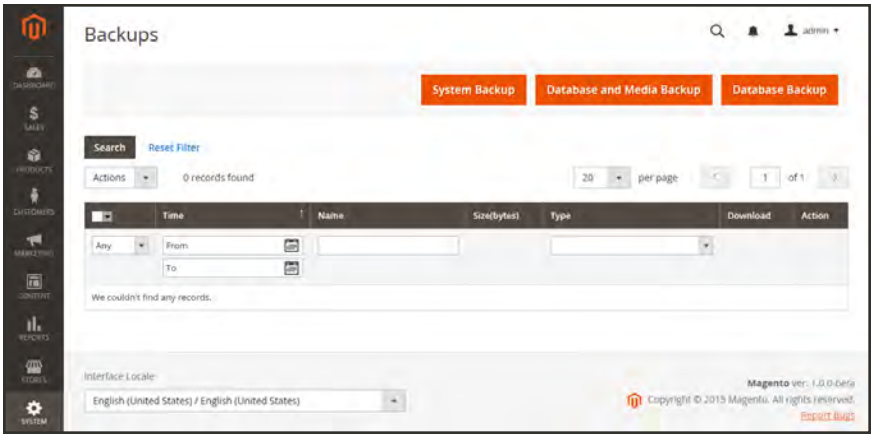
Access to the Backups and Rollback management tool can be restricted by configuring user permissions for backup and rollback resources. To restrict access, leave the corresponding checkbox unselected. If you need to grant access to rollback resources, you must grant access to backup resources as well.

Backup Before Installing Extensions and Updates

Always perform a backup before you install an extension or update Magento. Magento Connect Manager (MCM) includes a backup option that you can use before installing an extension or upgrading to a new release.

To create a backup:

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Backups**.



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.

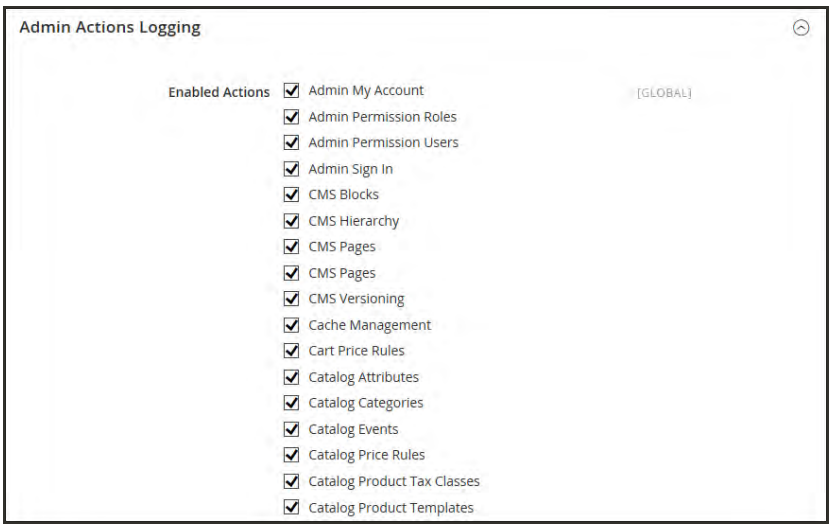
3. To put the store into maintenance mode during the backup, mark the checkbox. When the backup is complete, maintenance mode is turned off automatically.

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.

CHAPTER 87:

Action Log

The Action Log tracks the activities of administrators who work n your store. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object on which the action was performed. Additionally the IP and date are always logged.



Admin Actions Logging

To configure the Action Log:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand the **Admin Actions Logging** section, and do the following:
   - To enable admin logging, mark the checkbox.
   - To disable admin logging, clear the checkbox.
4. When complete, tap **Save Config**.

To configure the archiving of Admin Actions Logs:

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:

Admin Actions Log Archiving

   a. In the **Log Entry Lifetime, Days** field, enter the number of days that Admin Actions log entries are saved.

   b. Set **Log Archiving Frequency** to one of the following:

      - Daily
      - Weekly
      - Monthly

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

Archive

In addition, you can control how long the log entries are stored and how often they are archived. The Admin Actions archive lists the CSV log files that are stored on the server. By default, the file name includes the current date in ISO format: yyyyMMddHH.csv.

> Log archiving requires a cron job to be set up.

To set up Admin Actions Log Archiving:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Admin Actions Log Archiving** section, and do the following:
   a. In the **Log Entry Lifetime, Days** field, enter the number of days that you want to keep the log entries in the database before they are removed.
   b. Set **Log Archiving Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthly
4. When complete, tap **Save Config**.

Notes

CHAPTER 88:

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
- Customer Alerts and Notifications
- Currency Rate Updates
- Log Archiving

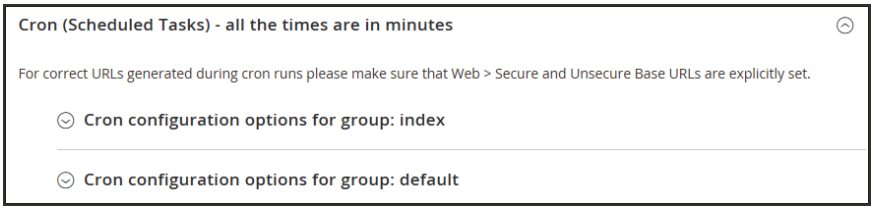
In addition, you can configure the following to run according to a cron schedule:

- Order System Grid Updates and Reindexing
- Pending Payment Lifetime

Make sure that the base URLs for the store are set correctly, so the URLs that are generated during cron operations are correct. To learn more, see: Configure and Run Cron.

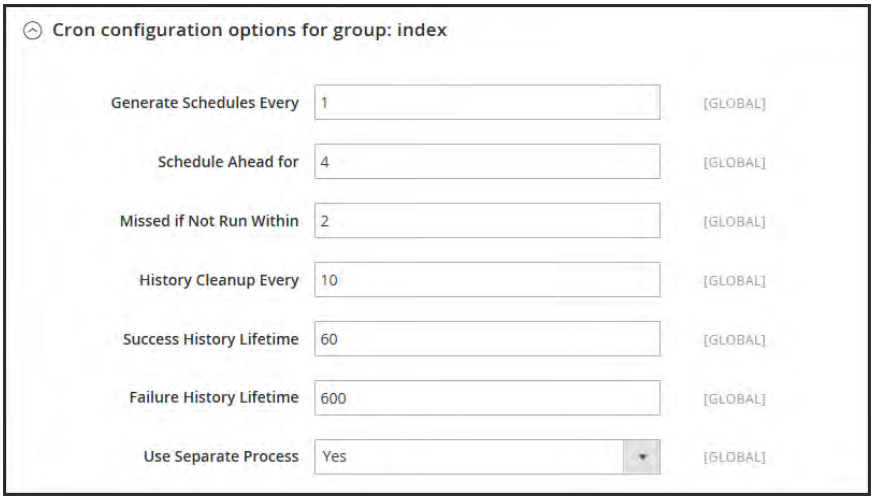
To configure Cron:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Cron** section.



Cron (Scheduled Tasks)

4. Then, complete the following settings for the **Index** and **Default** groups. The settings are the same in each section.
   - Generate Schedules Every
   - Schedule Ahead for
   - Missed if not Run Within
   - History Cleanup Every
   - Success History Lifetime
   - Failure History Lifetime
   - Use Separate Process



Cron Configuration for Group: Index

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

CHAPTER 89:

Web Setup Wizard

The Web Setup setup is the second part of the Magento installation that checks system readiness, establishes the database connection, and creates the initial Admin account. The Magento setup can be rerun at any time from the System menu.

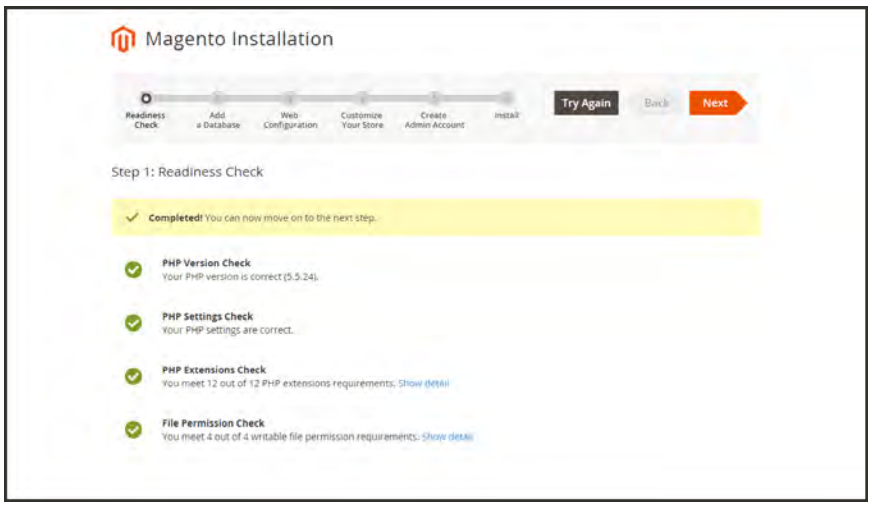
Magento Setup

To launch Magento Setup:

1. On the Admin sidebar, tap **System**. Then under Tools, choose **Web Setup Wizard**.
2. Read the **Terms & Agreement**. If you agree, tap **Agree and Setup Magento** to continue.

Step 1: Readiness Check

1. To verify that your system meets the system requirements, tap **Start Readiness Check**.
2. When the results appear, tap **Details** for more information. Then, do one of the following;
   - If your system fails the readiness check, correct the issue and tap **Try Again**.
   - If your system meets the requirements, tap **Next**.



Readiness Check

Step 2: Add a Database

1. To change the MySQL database or update the credentials, do the following:
   a. Enter the **Database Server Host**. If the database resides on the same server as the Magento code, enter "localhost."
   b. Enter the **Database Server Username**.
   c. Enter the **Database Server Password**.
   d. Enter the **Database Name**.
   e. If applicable, enter the **Table prefix**.
2. When complete, tap **Next** . Your credentials must be correct to continue to the next step.

Add a Database

Step 3: Web Configuration

1. Under Web Configuration, do the following:

   a. In the **Your Store Address** field, enter the full URL of your Magento store.

   b. In the **Magento Admin Address** field, enter the full URL of the Magento Admin.

2. Expand the **Advanced Options**, and do the following:

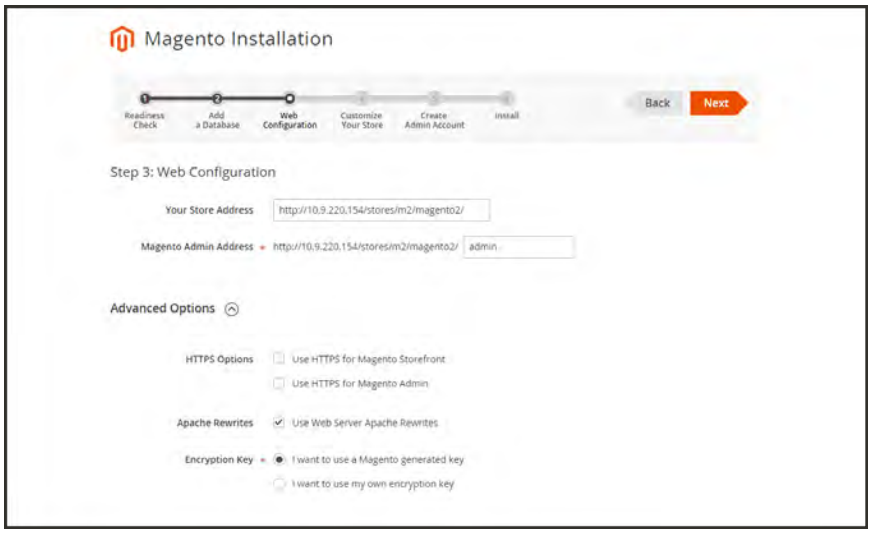
   a. Mark the checkbox of the **HTTPS Options** that apply to your system:

   - Use HTTPS for Magento Storefront
   - Use HTTPS for Magento Admin

   b. To enable your server to use **Apache Rewrites**, mark the checkbox.

   c. Mark the checkbox of the **Encryption Key** setting that applies to your system:

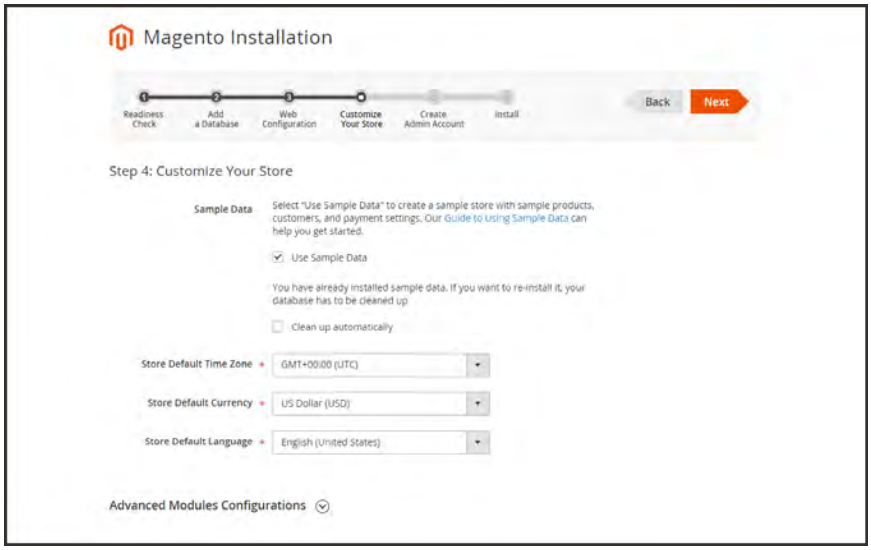
   - I want to use a Magento generated key.
   - I want to use my own encryption key.



Web Configuration

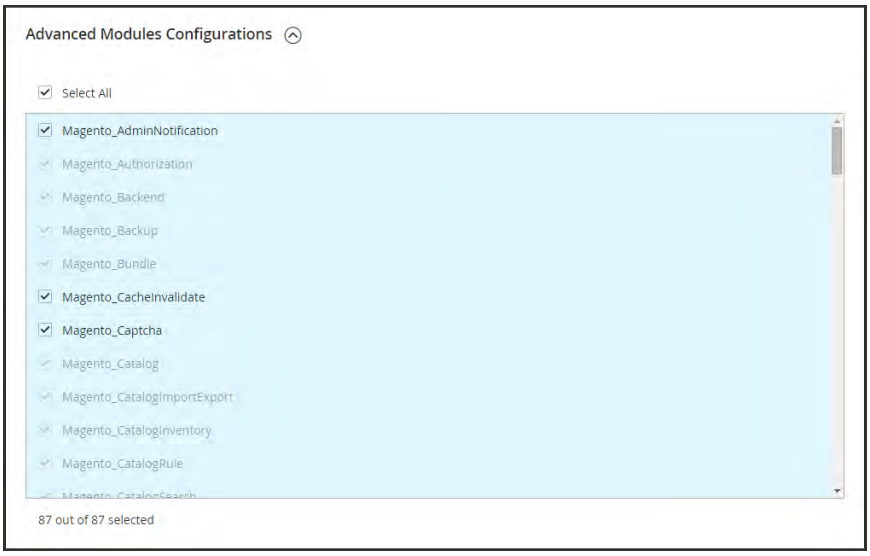
Step 4: Customize Your Store

1. To install or reinstall the **Sample Data**, do the following:
   a. To create a sample store with sample products, mark the **Use Sample Data** checkbox.
   b. If you are reinstalling the sample data, also mark the **Clean up automatically** checkbox.
2. Set **Store Default Time Zone** to the correct time zone for your locale.
3. Set **Store Default Currency** to the default currency that you accept as payment.
4. Set **Store Default Language** to the primary language of your store.



Customize Your Store

5. (Optional) Expand the **Advanced Modules Configuration**, and do the following:
   a. To install only specific modules, clear the **Select All** checkbox.
   b. In the list, select the checkbox of each module you want to install.

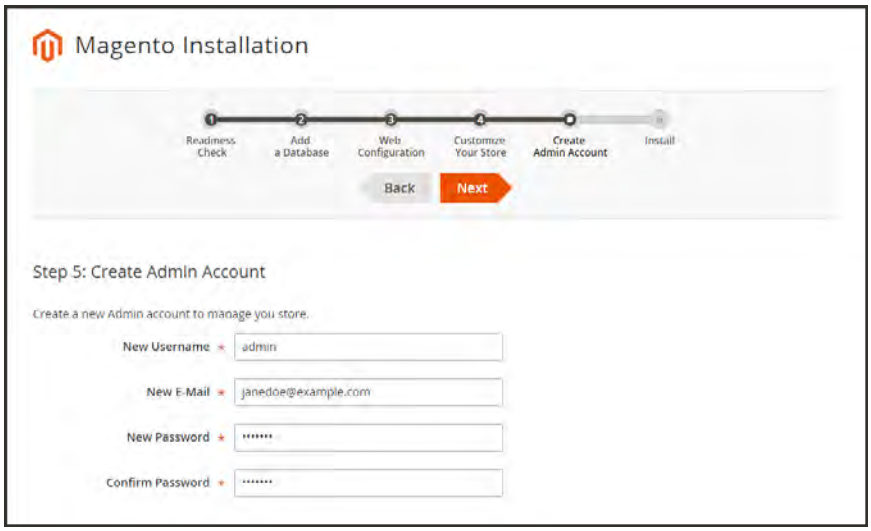


Advanced Modules Configuration

6. When complete, tap **Next**.

Step 5: Create Admin Account

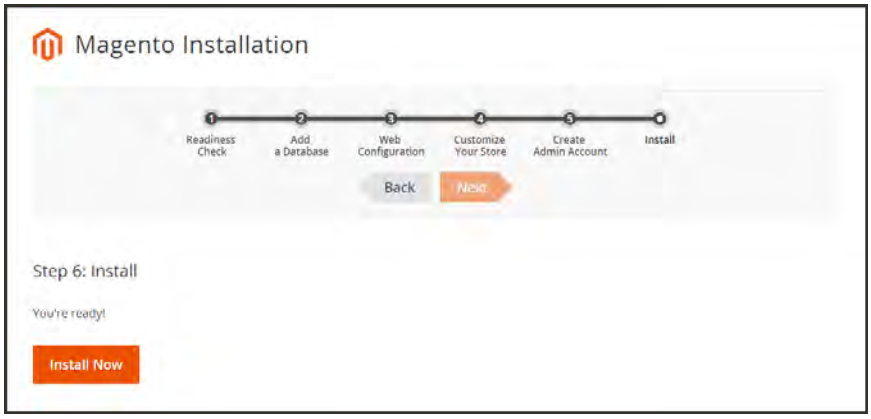
1. Enter a **New Username** for the Admin account.
2. Enter a **New E-Mail** for the Admin account.
3. Enter a **New Password** for the Admin account. Then in the **Confirm Password** field, enter your new password again.
4. When complete, tap **Next**.



Create Admin Account

Step 6: Install

1. When you are ready to complete the setup, tap **Install Now**.



Install

2. When the installation completes, a page appears with your Magento Admin and database credentials, but without the passwords. You can print the page and keep it for your records. Then, do of the following:
   - Launch Magento Storefront
   - Launch Magento Admin
3. If the installation fails to complete, view the **Console Log** to learn more. Then, correct the problem and try again.

3. After Setup is complete, do the following to set the recommended permissions for all files and folders in your Magento2 installation:

4. Change to the Web user who has full permissions to the Magento2 folder. (For example, apache or root.)

```
su - apache
```

5. Change directories to the Magento2 folder, and set the following permissions. You can copy the code, and paste it as a single command.

```
find . -type d -exec chmod 700 {} \; && find . -type f -exec chmod
600 {} \; && chmod +x bin/magento
```

Notes

CHAPTER 90:

Support

The Support Tools are designed to identify known issues in your system. They can be used as a resource during the development and optimization processes, and as a diagnostic tool to help our support team identify and resolve issues.

Data Collector

Data Collector gathers the information about your system that is needed by our Support team to troubleshoot issues with your Magento installation. The backup that is created takes several minutes to complete, and includes both a code and database dump. The data can be exported to a CSV or Excel XML file.

Data Collector

To run Data Collector:

1. On the Admin sidebar, tap **System**. Then under **Support** choose **Data Collector**.
2. In the upper-right corner, tap **New Backup**.

   It will take a few minutes to generate the backup. When complete, the backup appears in the Data Collector grid.
3. To view a log with the backup details, do the following:
   a. In the **Action** column, select **Show Log**.
   b. Click **Back** to return to the grid.

Log

To export backup data:

1. In the first column mark the checkbox of the backup to be exported.
2. On the **Export** menu, choose the format of the export data.

Export Format

3. Look for the download message at the bottom of the screen, and **Save** the file.

System Reports

The system reporting tool gives you the ability take periodic full, or partial, snapshots of the system, and save them for future reference. You can compare performance settings before and after code development cycles, or changes to server settings. The system reporting tool can dramatically reduce the time spent preparing and submitting the information required by Support to begin an investigation.

From the System Reports grid, you can view and download existing reports, delete reports, and create new reports.

Manage System Reports

To access system reports:

1. On the Admin sidebar, tap **System**. Then under **Support**, choose **System Report**.
2. To generate a new system report, tap **New Report**. Then, do the following:
   a. In the **Groups** list, select each set of information that you want to include in the report. By default, all groups are selected.
   b. In the upper-right corner, tap **Create**.

   It might take a few minutes for the report to generate.
3. To view the report, click the **View** link at the end of the row.
4. To download a report, click the **Download** link at the end of the row.
5. To create a new report, click the **New Report** button. Then, do the following:

a. In the list, select the **Groups** of system information that you want to include in the report.

Select Groups

b. Tap **Create** to generate the report.

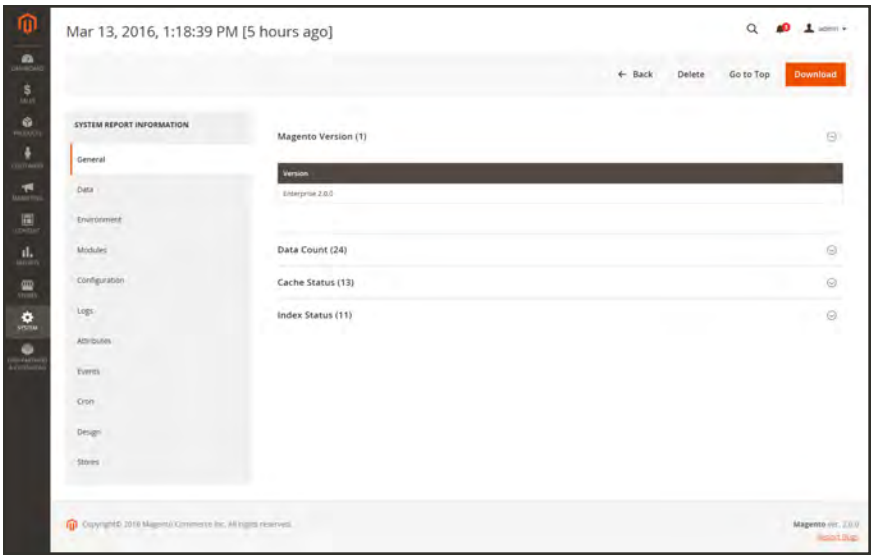
It might take a few minutes for the report to generate, depending on the number of report types selected. When the report is ready, it appears at the top of the grid with the date and time generated..

View System Report

6. In the **Action** column of the grid, select one of the following:

- View
- Delete
- Download

7. In the panel on the left, expand ⌄ each section of the report to view the detail.



General System Report Information

8. To save the report as an HTML file, tap **Download**. Then save the file to your computer.
9. To view the report, open the download file in a browser. In the header, tap the control to jump to a specific section of the report.

System Reports

REPORT GROUP	INFORMATION INCLUDED
General	Magento Version Data Count Cache Status Index Status
Environment	Environment Information MySQL Status
Modules	Custom Modules List Disabled Modules List All Modules List
Configuration	Configuration Data from app/etc/env.php Shipping Methods Payment Methods Payments Functionality Matrix
Logs	Log Files Top System Messages Today's Top System Messages Top Debug Messages Today’s Top Debug Messages Top Exception Messages Today's Top Exception Messages
Attributes	User Defined Eav Attributes New Eav Attributes Entity Types All Eav Attributes Category Eav Attributes Product Eav Attributes Customer Eav Attributes Customer Address Eav Attribute

System Reports (cont.)

REPORT GROUP	INFORMATION INCLUDED
	RMA Item Eav Attributes
Events	Custom Global Events
	Custom Admin Events
	Custom Frontend Events
	Customer Doc Events
	Custom Crontab Events
	Custom REST Events
	Custom SOAP Events
	Core Global Events
	Core Admin Events
	Core Frontend Events
	Core Doc Events
	Core Crontab Events
	Corre REST Events
	Core SOAP Events
	All Global Events
	All Admin Events
	All Frontend Events
	All Doc Events
	All REST Events
	All SOAP Events
Cron	Cron Schedules by status code
	Cron Schedules by job code
	Errors in Cron Schedules Queue
	Cron Schedules List
	Custom Global Cron Jobs
	Custom Configurable Cron Jobs
	Core Global Cron Jobs
	Core Configurable Cron Jobs
	All Global Cron Jobs
	All Configurable Cron Jobs

System Reports (cont.)

REPORT GROUP	INFORMATION INCLUDED
Design	Adminhtml Themes List Frontend Themes List
Stores	Website Tree Websites List Stores List Store Views List

Notes

APPENDICES

Appendices

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.

Magento 2.x has a quarterly product release cycle, which is represented by the first decimal position in the version number. In addition, there might be interim patch releases to resolve security issues, and make necessary updates to the software. Patch releases are represented by the second decimal position in the version number.

We sometimes refer to the current quarterly release, which at this time is 2.0, or to a specific patch release, such as 2.0.2. The designation 2.x is a general reference that includes any future or past version of the product.

As a best practice, we recommend that you keep your Magento 2.x installation up to date, so you can benefit from the latest features and advancements in digital commerce. You can find the release notes for the current and previous versions of Magento Enterprise Edition, 2.x online.

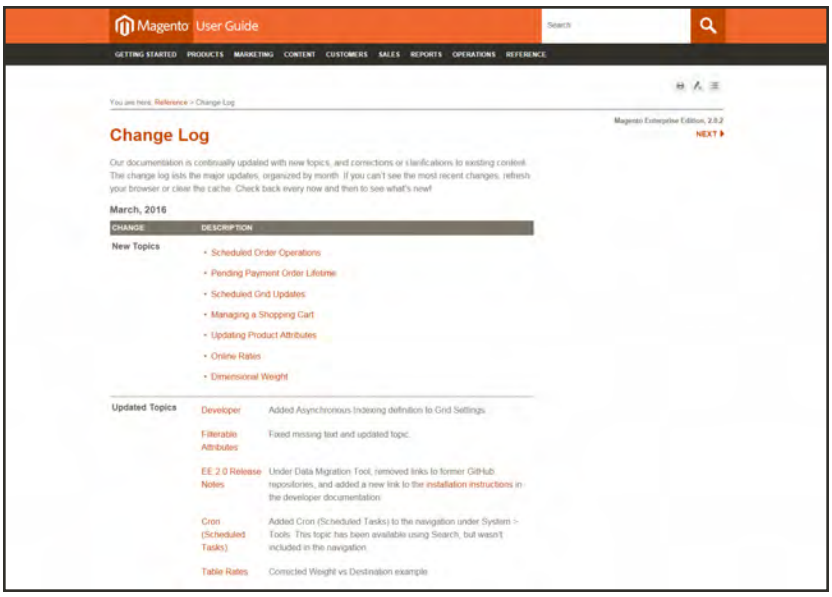
- Magento Enterprise Edition 2.0.2 Release Notes
- Magento Enterprise Edition 2.0.1 Release Notes
- Magento Enterprise Edition 2.0 Release Notes

Notes

APPENDIX B:

Change Log

Our documentation is continually updated with new topics, and corrections or clarifications to existing content. The Change Log in the online user guide lists the major updates, organized by month. If you can't see the most recent changes, refresh your browser or clear the cache. Check back every now and then to see what's new!



Change Log

Notes

APPENDIX C:

Glossary

A

above the fold
The web page content that is immediately visible in the browser window; section of a page that is displayed without the need to scroll.

Admin
The password-protected back office of your store where orders, catalog, content, and configurations are managed.

alt text
The text that is displayed in place of an image when the user is unable to view the image.

anchor text
The visible text that is anchored to another page or page section; the literal text of a hyperlink.

API
Application Program Interface: A software interface that lets third-party applications read and write to a system using programming language constructs or statements.

aspect ratio
The proportional relationship between the width and height of an image.

attribute
A characteristic or property of a product; anything that describes a product. Examples of product attributes include color, size, weight, and price.

authorization
To give a service permission to perform certain actions or to access resources.

average inventory cost
Product price, less coupons or discounts, plus freight and applicable taxes. The average is determined by adding the beginning cost of inventory each month, plus the ending cost of inventory for the last month of the period.

B

B2B
Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

B2C
Business to Consumer: Business transactions between a business entity and a consumer.

banner
Promotional graphics displayed either horizontally on the top of a web page or vertically on the left or right margins. Website advertisements are often displayed as banners.

base currency
The primary form of currency used in store transactions.

base currency rate
The base currency rate is the default for your store.

batch processing
To perform a task or make a change to multiple items all at once, without manual repetition.

bounce rate
The percentage of visitors to your site that leave without viewing any other pages.

brand
A unique identity that defines a particular product or group of products.

breadcrumb
A navigation aid that helps the user to keep track of their location within your store.

brick and mortar
A retail business with a permanent physical location, as opposed to being entirely virtual.

broken link
A hyperlink that fails to send the user to its intended web page.

C

callout
A term that is sometimes used to describe a block that is defined as a layout update using XML code.

canonical URL
The canonical meta tag redirects search engines to the correct URL, when seemingly duplicate content is encountered on the server.

capture
The process of converting the authorized amount into a billable transaction. Transactions cannot be captured until authorized, and authorizations cannot be captured until the goods or services have been shipped.

cardholder
A person who opens a credit card account and is authorized to make purchases.

cascading style sheet
The markup standard used to apply styles to HTML elements on the page.

category
A set of products that share particular characteristics or attributes.

CCV
Credit Card Verification code. (See CVV)

checkout process
The process of gathering the payment and shipping information that is necessary to complete the purchase of items in the shopping cart. In the final step, the customer reviews and places the order.

CMS
Content Management System: A software system that is used to create, edit, and maintain content on a website.

complex data
Data that is associated with multiple product options.

complex product
A product that requires the customer to choose from a selection of options.

composite product
Any product type that offers customers a choice of options.

Content Delivery Network
A large distributed network of servers that specializes in the high performance delivery of multi-media content.

content marketing
The art of promoting products or services by providing valuable information at no charge.

conversion
A marketing term that indicates a goal has been reached. If the goal is to sell a product, conversion is reached when a visitor to your site becomes a buyer.

conversion rate
The percentage of visitors who are converted into buyers.

credit memo
A document issued by the merchant to a customer to write off an outstanding balance because of overcharge, rebate, or return of goods.

CSS
Cascading Style Sheets: A style sheet language that controls the appearance of HTML documents; a way to control the appearance of text, graphics, lists, links, and all other elements on a web page.

CSV
Comma Separated Values: A type of file used to store data values which are separated from each other by commas.

CVM
Card Verification Method: A way to verify the identity of the customer by confirming a 3-digit or 4-digit credit card security code with the payment processor.

CVV
The Card Verification Value, also known as the Card Security Code, provides an additional level of security for online transactions.

D

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.

M

markdown
The amount subtracted from the original price of a product.

markup
A percentage added to the cost of an item to determine the retail price.

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.

My Term
My definition

N

navigation
The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

O

opt-in
The process by which a user consents to receiving emails from an online store.

P

packing slip
A document that is usually included in a shipped package that describes the contents. Packing slips do not include financial or account information.

path to purchase
The path a prospect follows that leads to a sale.

payment bridge
An application that helps merchants meet PCI- DSS requirements.

payment gateway
A service that charges your customers' credit cards and sends the funds to your merchant account, for deposit into your business bank account.

Payment Gateway
A third-party service that processes transactions for external payment methods.

Payment Method
A way for the customer to pay for the merchandise in your store. Payment methods can be internal or external. The Payment Methods section of the System Configuration includes all basic payment methods and gateways.

PCI
Payment Card Industry: Refers to debit and credit cards and their associated businesses.

privacy policy
A document that explains the merchant's policies for handling customer information.

purchase order (PO)
A written sales contract between a buyer and seller that describes the merchandise or service to be purchased from a vendor.

R

redirect
A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

relative link
A hyperlink that includes only the address of the linked page that is relative to the linking page, rather than the full URL.

return policy
A document that explains the merchant's rules regarding the return of products by customers.

robots.txt
A file placed on a website that tells search engine crawlers which pages not to index.

RSS feed
Really Simple Syndication: A technology that creates web content syndication and allows web users to subscribe to product feeds, websites, and blogs.

S

SaaS
Software as a Service: A software delivery model where the vendor provides the software and hosting environment, and customers pay for the service by subscription or per use.

Sass/Compass
A CSS pre-compiler that provides organizable, reusable CSS.

security certificate
Information that is used by the SSL protocol to establish a secure connection.

SEO
Search Engine Optimization: The process of improving a website's search engine rankings in order to increase valued visitors.

SERP
Search Engine Results Page

settlement
Settlement occurs when the acquiring bank and the issuer exchange funds and the proceeds are deposited into the merchant account.

shipping carrier
A company that transports packages. Common carriers include UPS, FedEx, DHL, and USPS.

shopping cart
A grouping of products that the customer wishes to purchase at the end of their shopping session.

sidebar
The right or left column of a two-column page layout.

sitemap
A page that provides search engines with an efficient, alternate route through your site.

SKU
Stock Keeping Unit: A number or code assigned to a product to identify the product, options, price, and manufacturer.

splash page
A promotional page with a product or advertisement; normally displayed before the home page.

SSL certificate
A validation and security mechanism that identifies the merchant and encrypts credit card and other sensitive information.

static block
A fixed content block that can be displayed on various content pages in a store.

static content
Content that does not change frequently. See also dynamic content.

T

tax rule
A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

theme
A package that contains graphics and appearance information, and customizes the look and feel of the store.

transactional email
A notification email sent to the customer when a transaction is processed.

transactional emails
An automated email message that is sent in response to a specific event or transaction.

U

URL
Uniform Resource Locator: The unique address of a page on the internet.

usability
Refers to the degree to which a product or service is easy to use by its customers.

W

widget
A prepared snippet of code that adds functionality and/or dynamic effects to your store.

WYSIWYG
What You See Is What You Get: An editor that displays formatted text as it will appear in its final published form.

X

XML
Extensible Markup Language: A markup format derived from SGML that it used to format information for publication and distribution.

APPENDIX D:

Documentation Archive

To open the PDF in your browser, simply click the link. To save the PDF to your computer, right-click the link.

User Guide Downloads

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