Magento
An Adobe Company

Magento Commerce
User Guide

Version 2.2

Contents

About This Guide

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

Online User Guide

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

PDF User Guide (You are here!)

You'll find the same great information in the PDF user guide, based on the date last updated. Simply click the link to open the PDF in your browser. You can also right-click the download link to save the file to your computer. To page through the PDF as a book, set your reader's View > Page Display to "Two Page View".See the Documentation Archive for previous versions of the user guide. Updated: 27 October. 2017

GETTING STARTED

Contents

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

CHAPTER 1:

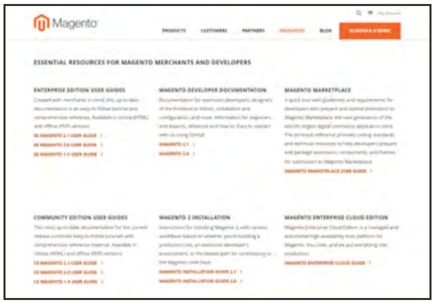
Welcome

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

Magento Advantage

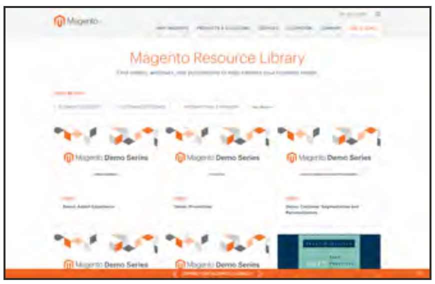
Resources

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



Product Documentation

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



Magento Resources Library

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

Security Center

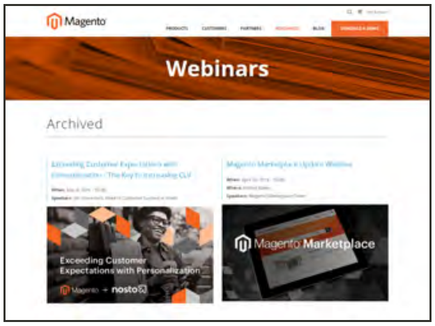
Join Magento's Security Alert Registry to get the latest information on potential vulnerabilities and Security Best Practices.

Forums

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

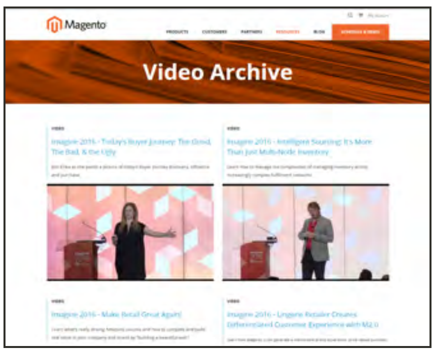
Blog

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



Webinars

Don't worry if you miss a live webinar! You can find the archived version here.

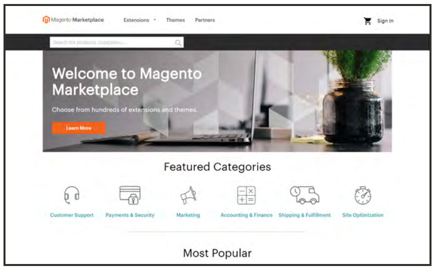


Video Archive

Catch up and review archived sessions from Imagine 2016!.

Events

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

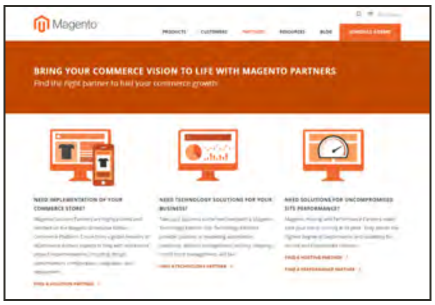


Magento Marketplace

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

Training & Certification

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



Partners

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

Expert Consulting Services

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

Join the Conversation!

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

Magento Forums

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

Facebook

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

Twitter

Follow us on Twitter!

LinkedIn

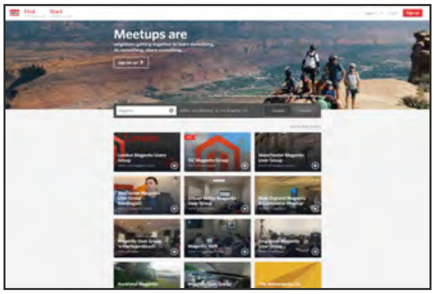
Join a Magento group on LinkedIn.

Google+

Add us to your circle on Google+.

YouTube

Learn while you watch videos
on our YouTube channel!



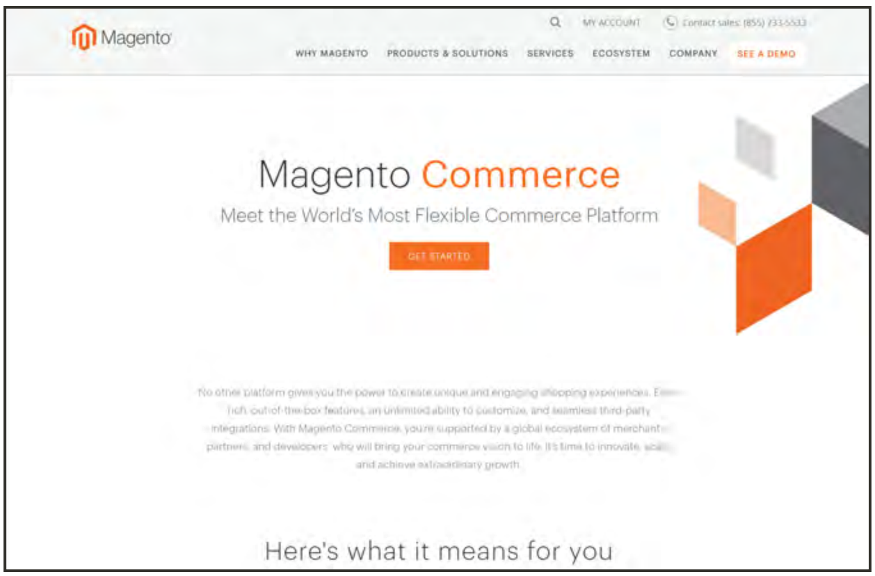
Meetup

Find a Magento Meetup near you!

CHAPTER 2:

About This Release

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



Magento Commerce

System Requirements

For the most up-to-date information, see System Requirements in the 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 mainline version)	
PHP	**Supported**		**Not Supported**
	7.0.2		7.0.0
	7.0.4		7.0.1
	7.0.6 - 7.0.x		7.0.3
	7.1.x		7.0.5
	Required PHP Extensions:		
	`bc-math` (Magento Commerce only)		
	`curl`		
	`gd`, ImageMagick 6.3.7 (or later) or both		
	`intl`		`SimpleXML`
	`mbstring`		`soap`
	`mcrypt`		`xml`
	`mhash`		`xsl`
	`openssl`		`zip`
	`PDO_MySQL`		
	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 5.7or 5.6.x Compatible with MariaDB and Percona Magento Enterprise Edition 2.x 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. Transport Layer Security (TLS) Requirements:	
	TSL 1.1 or later	PayPal and repo.magento.com require TSL 1.1 or later.
Mail Server	Mail Transfer Agent (MTA) or SMTP server	

Supported Applications

NAME	DESCRIPTION	
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	Elasticsearch	Versions 5.x, 2.x, and 1.7 2.x supported from Linux repository. 2.0 branch supported from PHP repository.
	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.

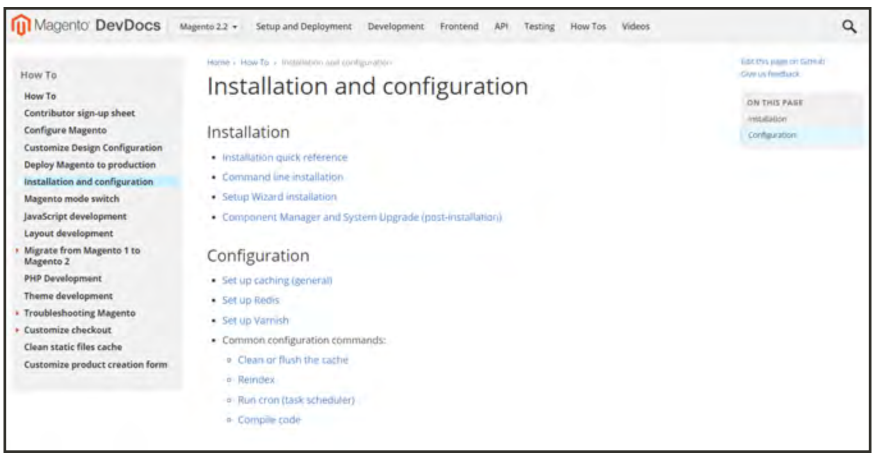
Installation

To download and install the latest release of Magento 2.x on your server, see the Installation and Configuration in our technical documentation. The Magento installation can be deployed to run in either production or developer mode. Some tools and configuration settings are designed specifically for developers, and can be accessed only while the store is running in developer mode. To learn more, see: Magento Modes.

The Magento installation consists of the following steps:

- Set Up Your Environment
- Get the Magento Software
- Complete the Web Setup
- Verify

To update an existing installation, see Web Setup Wizard in the System section of this guide.



Installation and Configuration

Prelaunch Checklist

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

General Settings

☑ **Store URLs**

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

☑ **Security Certificate**

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

☑ **Store Email Addresses**

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

Marketing Settings

☑ **Email Templates**

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

☑ **Sales Communications**

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

☑ **Google Tools**

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

Sales & Marketing Settings

Cart Options

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

Checkout Options

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

Taxes

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

Shipping Methods

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

PayPal

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

Payment Methods

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

System Settings

Cron (Scheduled Tasks)

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

Your Login Credentials

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

Storefront URL

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

`http://mydomain.com`

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

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

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

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

Admin URL

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

`http://mydomain.com/admin`

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

Magento Account

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

Customer Account

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

For Your Records

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

Store and Admin

Store URL: ____________________

Admin URL: ____________________

Admin User Name: ____________________

Admin Password: ____________________

Admin Email Address: ____________________

Magento Account

User Name: ____________________

Password: ____________________

Email Address: ____________________

Test Customer Account

User Name: ____________________

Password: ____________________

Email Address: ____________________

Installation Information

Installation Date: ____________________

Magento Version: ____________________

Encryption Key: ____________________

Database Name: ____________________

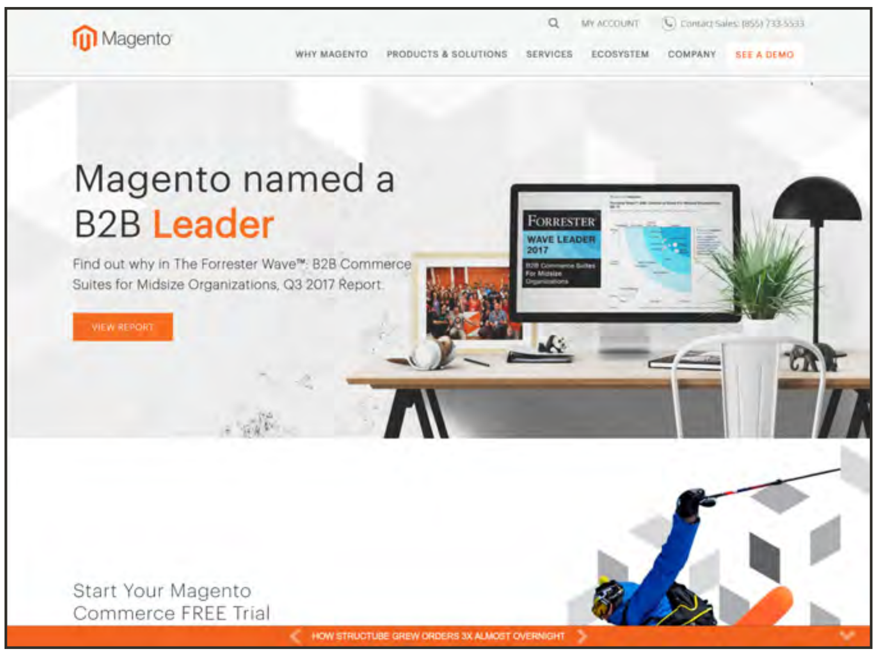
Database User Name: ____________________

Database Password: ____________________

CHAPTER 3:

Your Magento Account

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



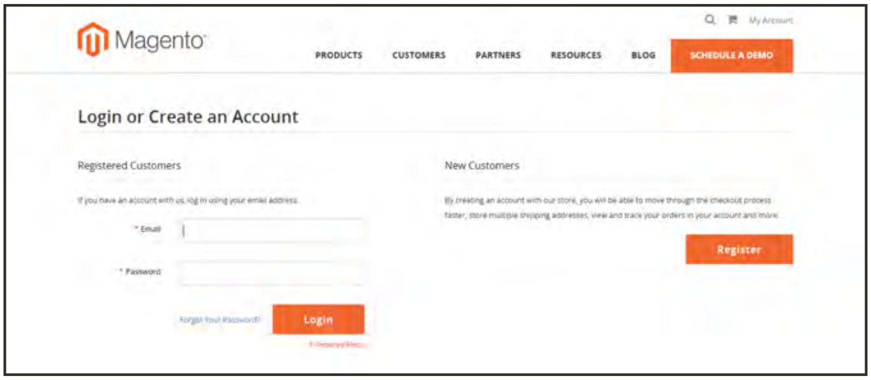
Your Magento Account

Creating an Account

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

To create a Magento account:

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



Log In to Your Account

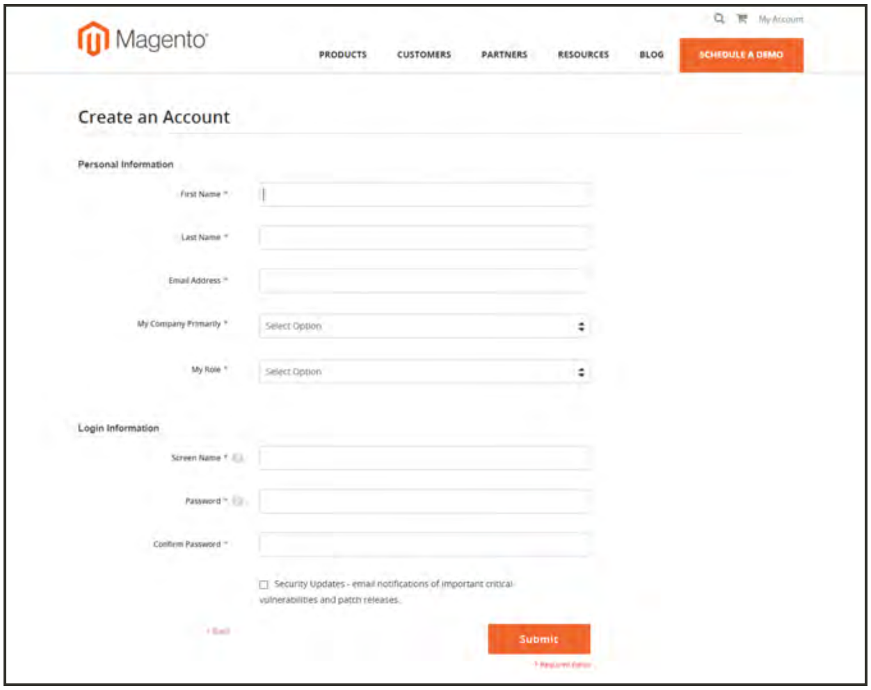
3. Under Personal Information, do the following:
   a. Enter your **First Name**, **Last Name**, and **Email Address**.
   b. Set **My Company Primarily** to the best description of what your company does. Then, set **My Role** to the best description of what you do for the company.
4. Under Login Information,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

   Your screen name can be from four to fifteen characters long, can include numbers and the underscore, but must start with a letter.

   b. Enter a **Password** for your account. Then, enter it again to confirm.

   Your password can be from eight to sixteen characters long, and must include at least one capital letter, one number, and one special character or one lowercase letter.

   c. When complete, tap **Submit**. Your account dashboard appears.



Create an Account

To log in to your Magento account:

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

To receive a new password:

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

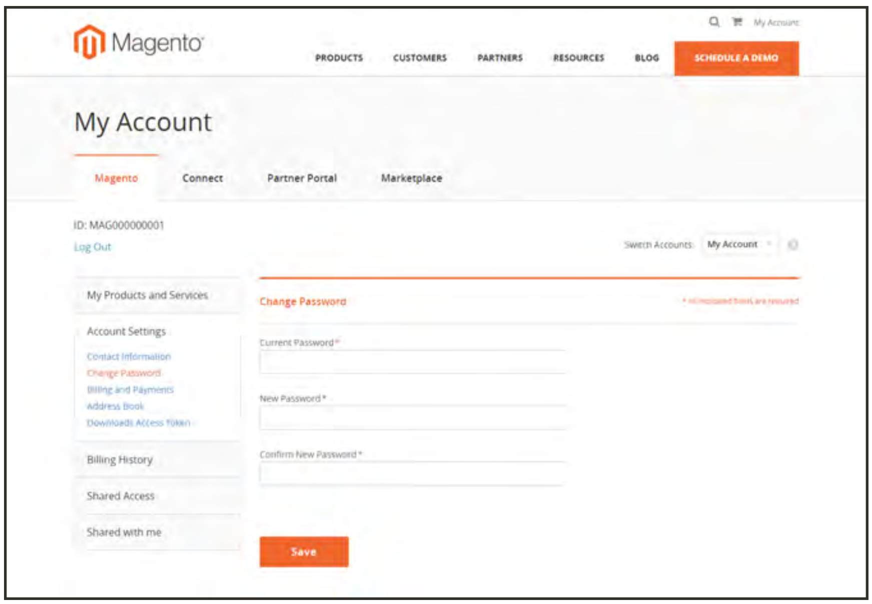
   You will receive an email from Magento with a temporary password that you can use to log into your account. Then, reset your password from the dashboard of your account.

To reset your password:

1. Log in to your Magento account.
2. In the panel on the left, choose **Account Settings**. Then, tap **Change Password**
3. Enter your **Current Password**.

   If you forgot your password, enter the temporary password that was sent to you.
4. Enter your **New Password**. Then, enter it again to confirm.

   > Your Magento password must be between 8-16 characters, and include at least one capital letter, one number, and one special character or lowercase letter.
5. When complete, tap **Save**.



Change Password

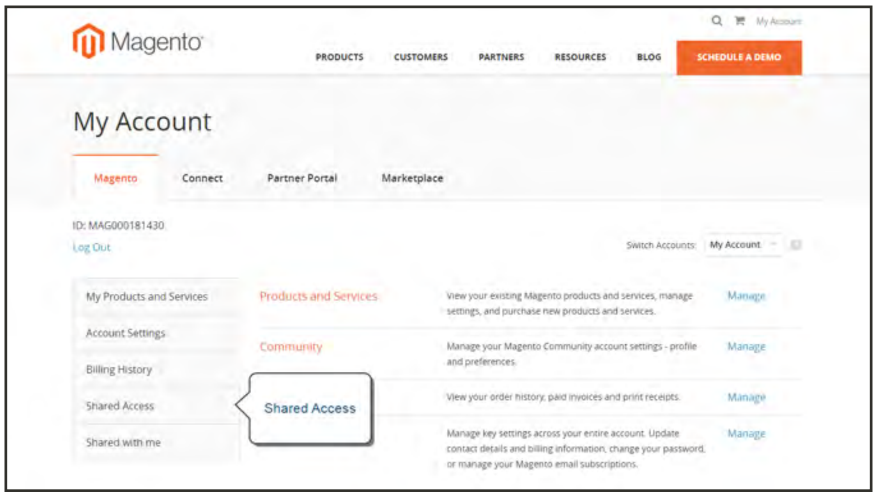
Magento Account Password Requirements

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

Sharing Your Account

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

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



Shared Access

To set up a shared account:

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

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

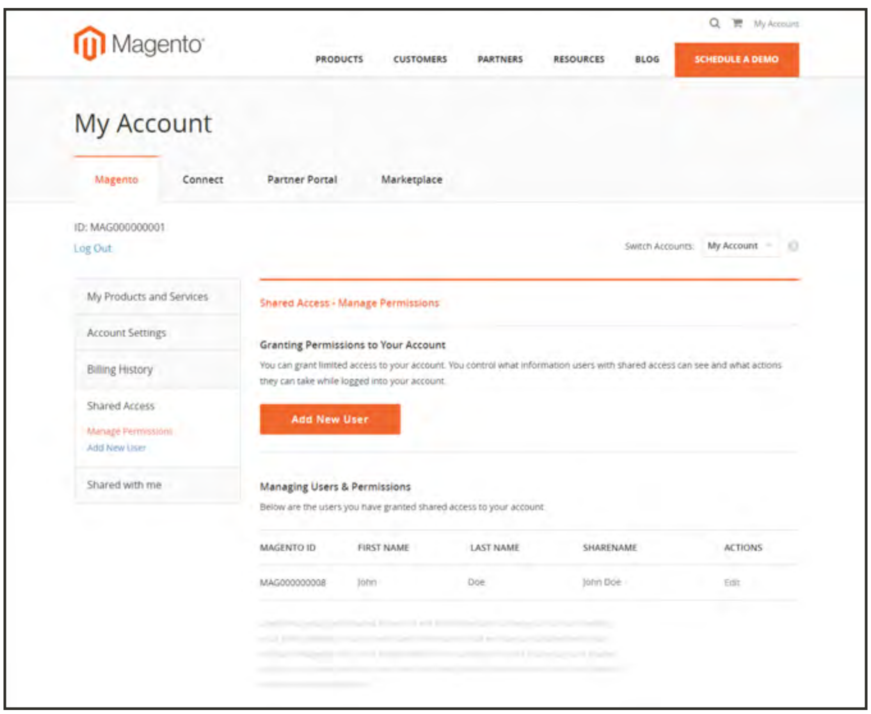
b. To share your personal contact information, mark the checkbox of each item that you want to make available to the other person:

- Your Email
- Your Phone

5. In the Grant Account Permissions section, mark the checkbox of each Magento product and service that you want to share.

6. When complete, tap **Create Shared Access**.

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



Manage Permissions

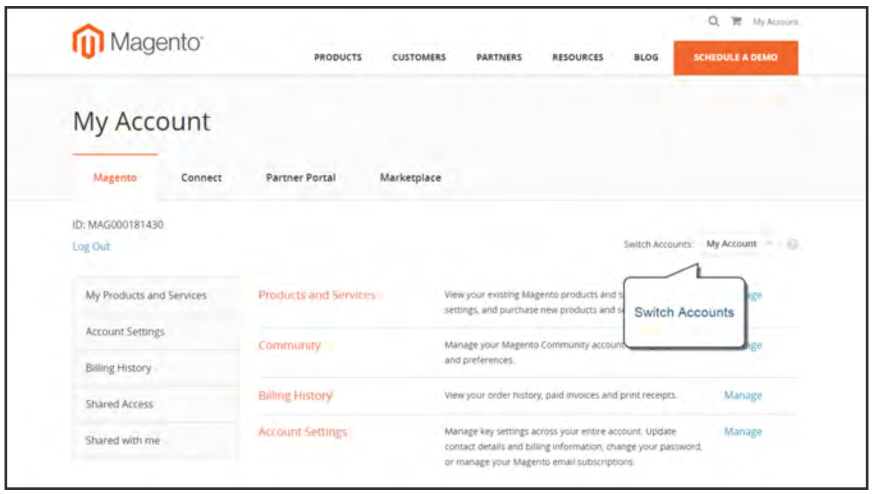
To access a shared account:

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

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

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

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



Switch Accounts

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

CHAPTER 4:

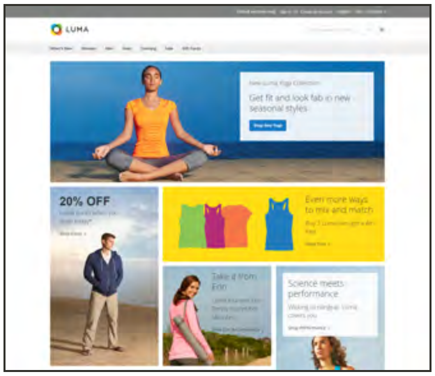
Quick Tour

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

Customer Journey

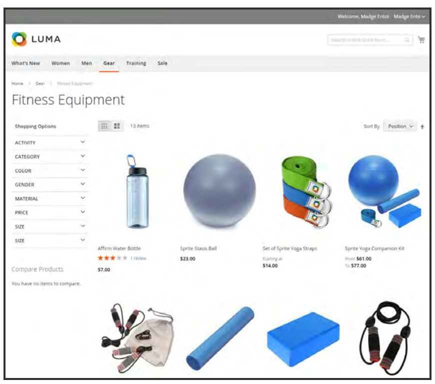
Path to Purchase

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



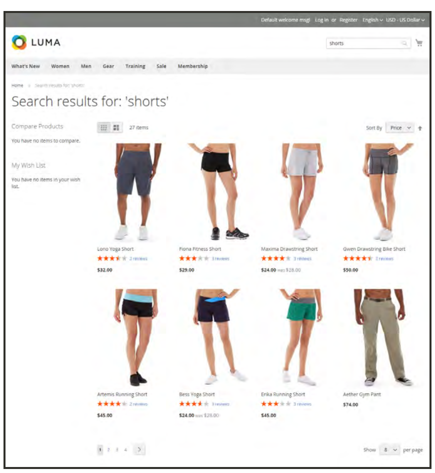
Home Page

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



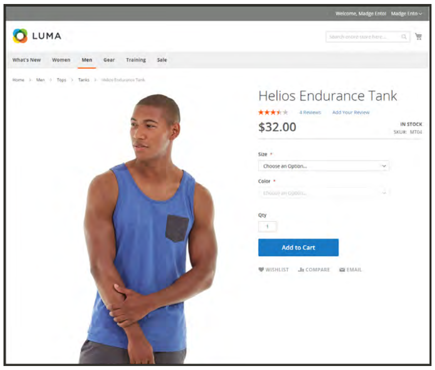
Catalog Page

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



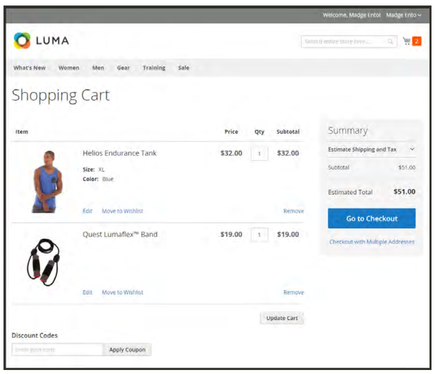
Search Results

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



Product Page

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



Shopping Cart

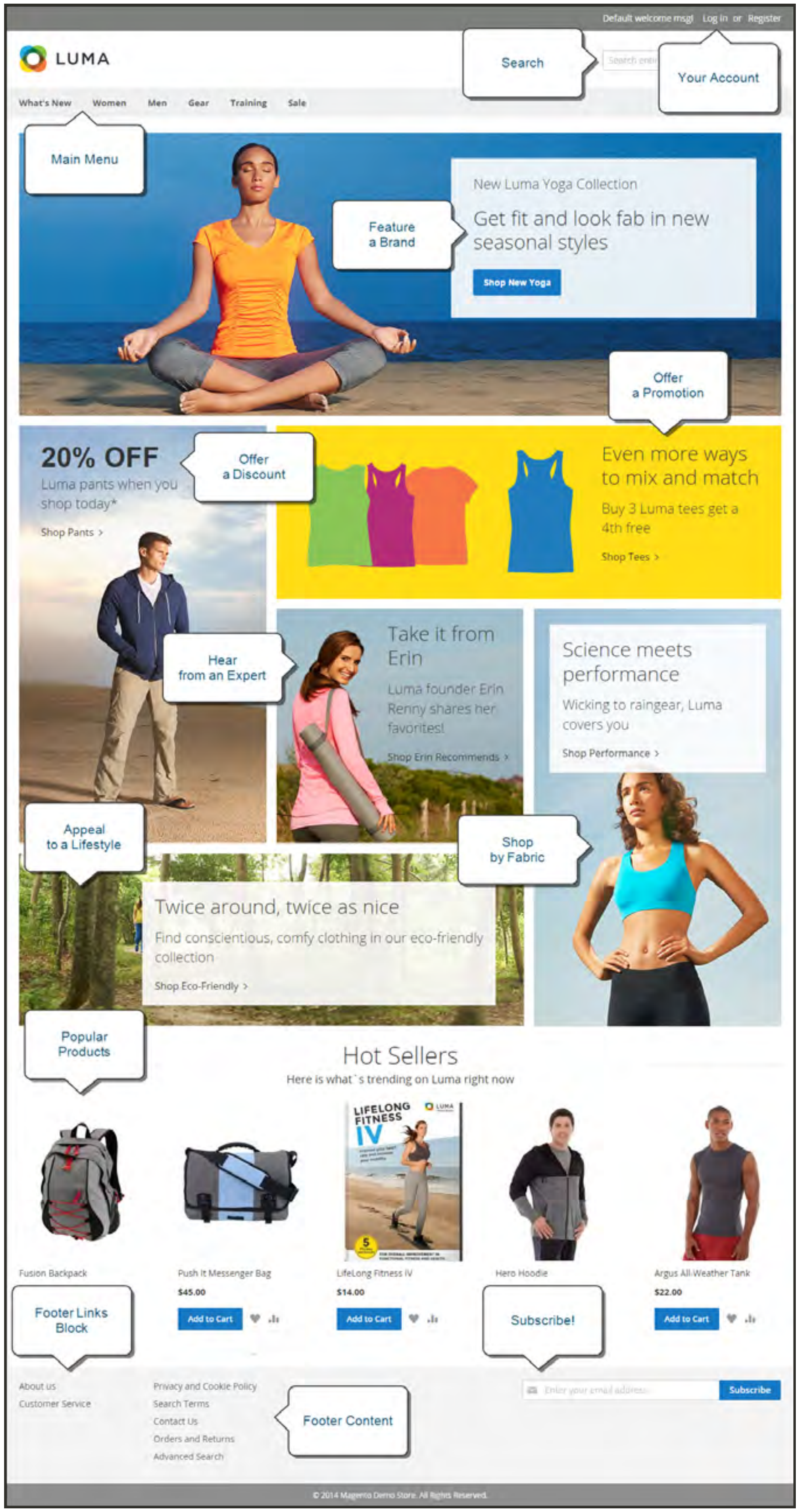
The shopping cart lists each item by price and quantity selected, and calculates the subtotal. Shoppers can apply discount coupons, and generate an estimate of shipping and tax charges.

Home Page

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

Callouts

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


Default welcome msg! Log in or Register
LUMA
Search
Your Account
What's New Women Men Gear Training Sale
Main Menu
Feature a Brand
New Luma Yoga Collection
Get fit and look fab in new seasonal styles
Shop New Yoga
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
LifeLong Fitness IV
$14.00
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

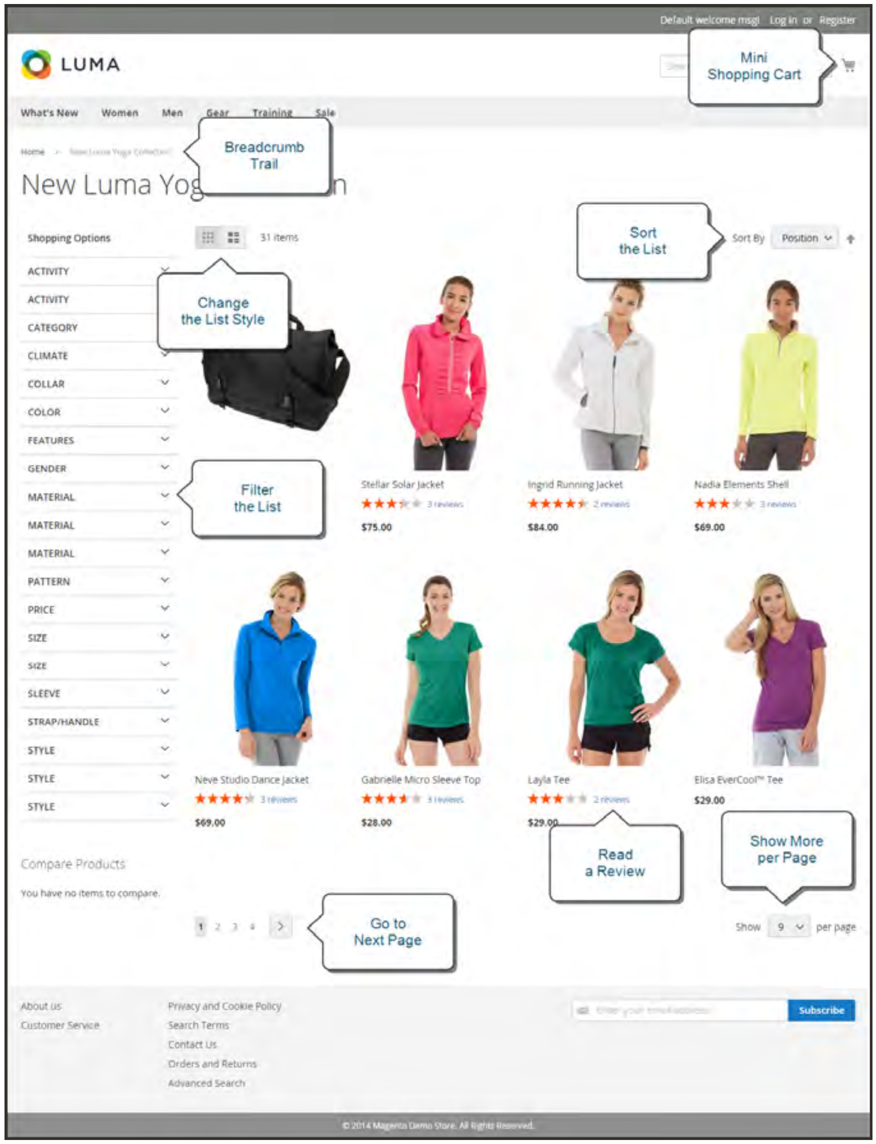
Catalog Page

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

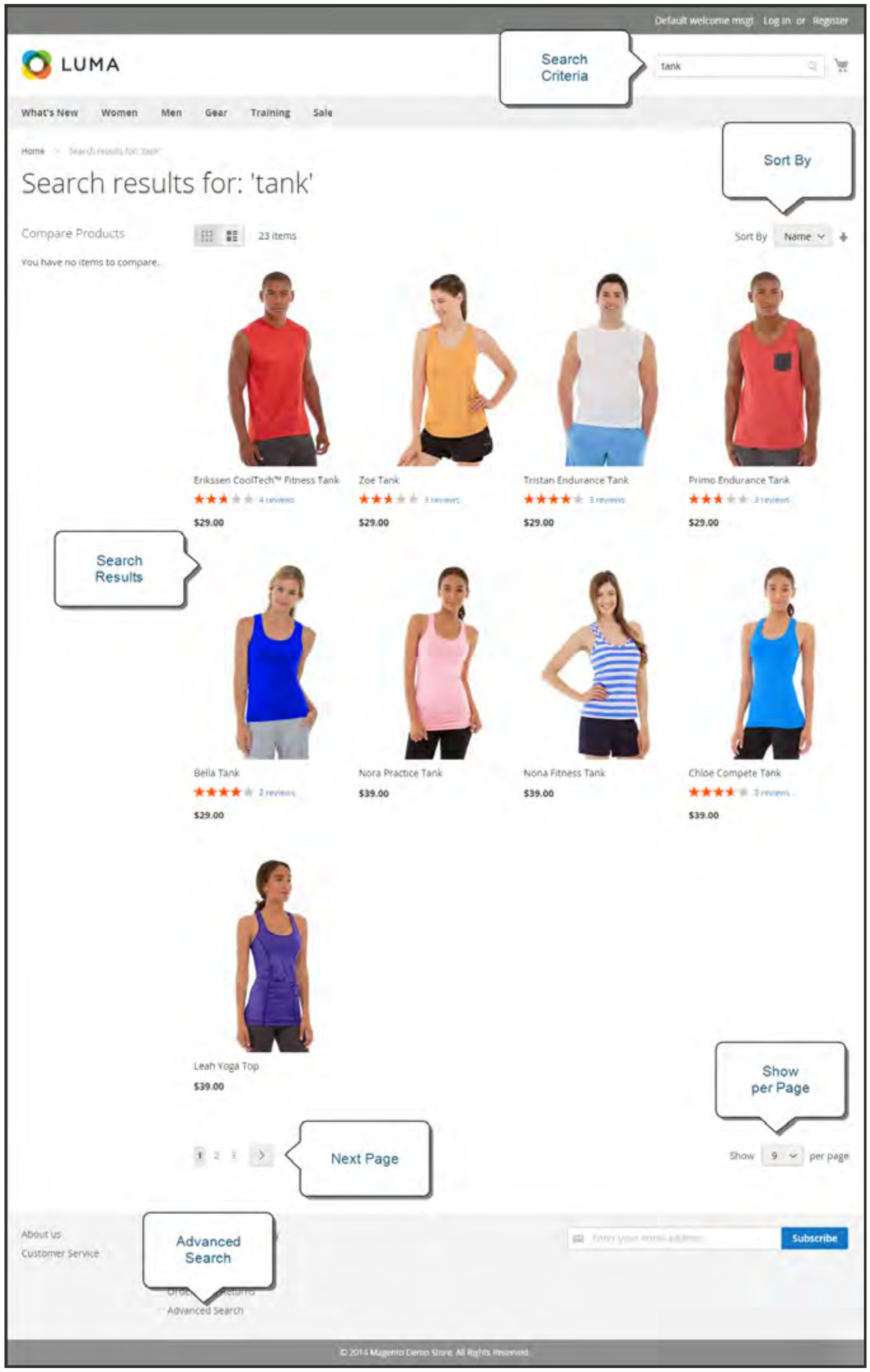
Search Results

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 “pre-qualified.”

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

Callouts

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



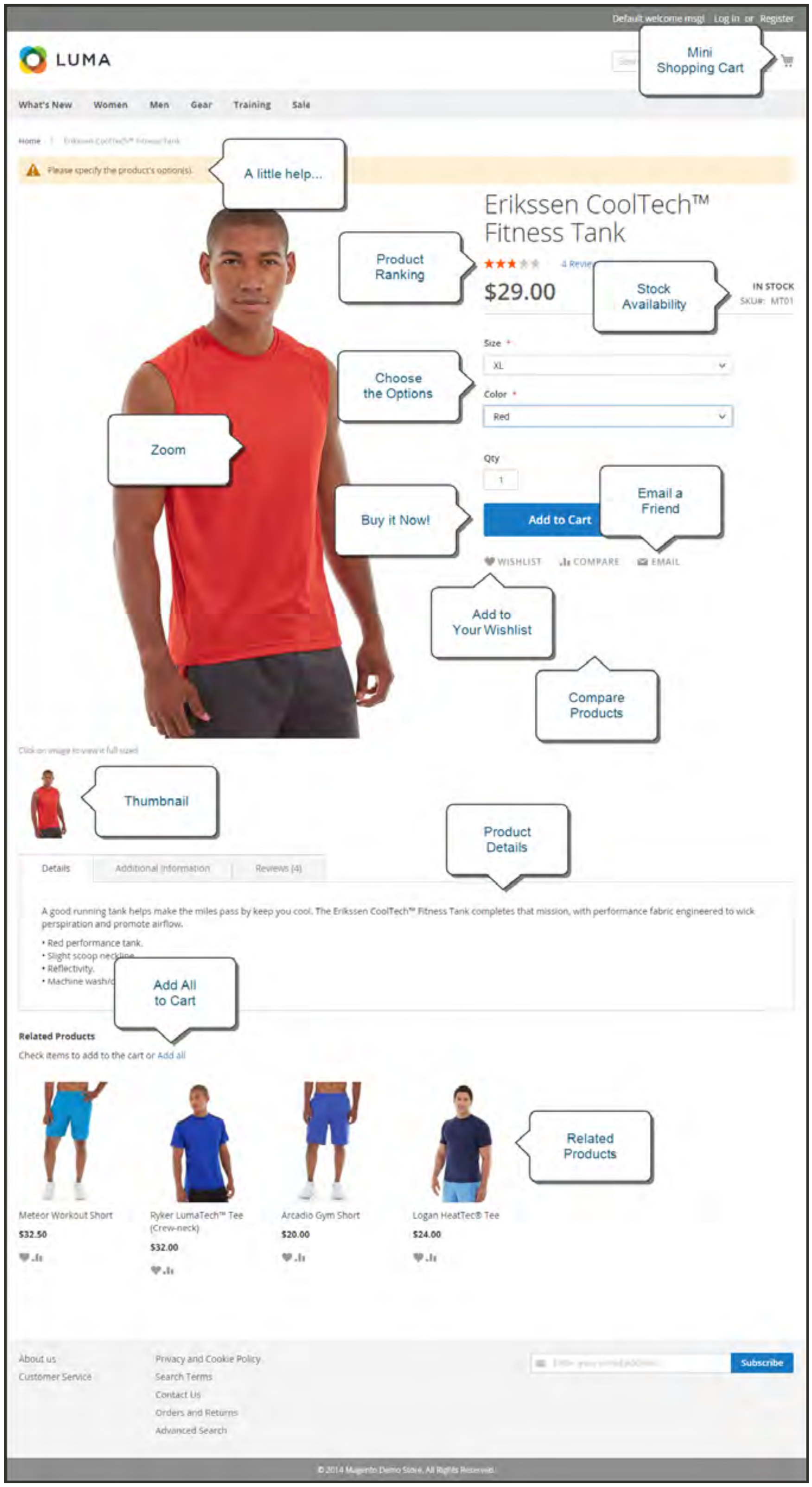
Search Results Page

Product Page

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

Callouts

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



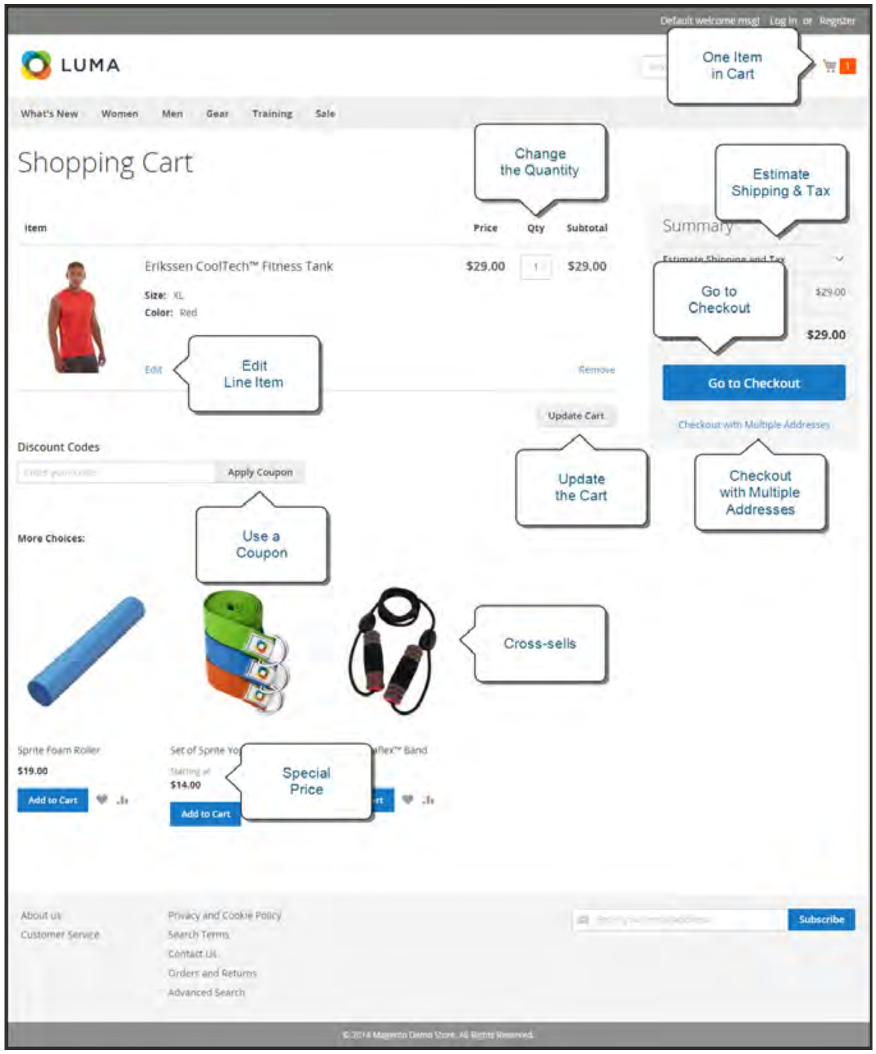
Product Page

Shopping Cart

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

Callouts

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



Shopping Cart Page

Customer Journey

Attract New Customers

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

Engage Your Customers

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

Increase AOV

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

Moment of Purchase

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

Customer Retention

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

Loyalty & Advocacy

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

Attract New Customers

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

Search Engine Optimization

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

Custom URLs

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

Meta Data

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

Sitemap

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

Analytics

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

Engage Your Customers

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

Content Management

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

Design & Theme

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

Multiple Stores, Sites & Views

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

Multiple Devices

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

Shopping Tools

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

Sophisticated Search

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

Increase Average Order Value

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

Targeted Promotions

Use catalog and shopping cart price rules to create promotions that kick into gear when a set of conditions is met. Segment customers dynamically and build segments based on specific characteristics such as customer address, order history, shopping cart content, and much more.

Coupons

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

Product Suggestions

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

Email Reminders

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

User Permissions & Roles

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

Full-Page Caching

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

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

Sales Order Archive

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

Index Management

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

Moment of Purchase

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

Instant Purchase

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

Shopping Assistance

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

Security

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

Order Processing

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

Multiple Payment Options

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

PayPal Merchant Solutions

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

Magento Shipping

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

Multiple Shipping Options

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

Shipping Labels

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

Retain Customers

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

Email Marketing Automation

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

RMA

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

Store Credit

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

Reward Points

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

Target Shopping History

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

Custom Coupons

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

Newsletters

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

RSS Feed

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

Build Loyalty & Advocacy

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

Advanced Reporting

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

Dashboard Snapshots

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

Customer Accounts

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

Advocacy Tools

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

Reviews & Ratings

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

Success!

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

Implementation

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

Design

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

Product Catalog

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

Payment Methods

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

Shipping Methods

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

Taxes

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

Thanks for your order!

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

Basic Configuration

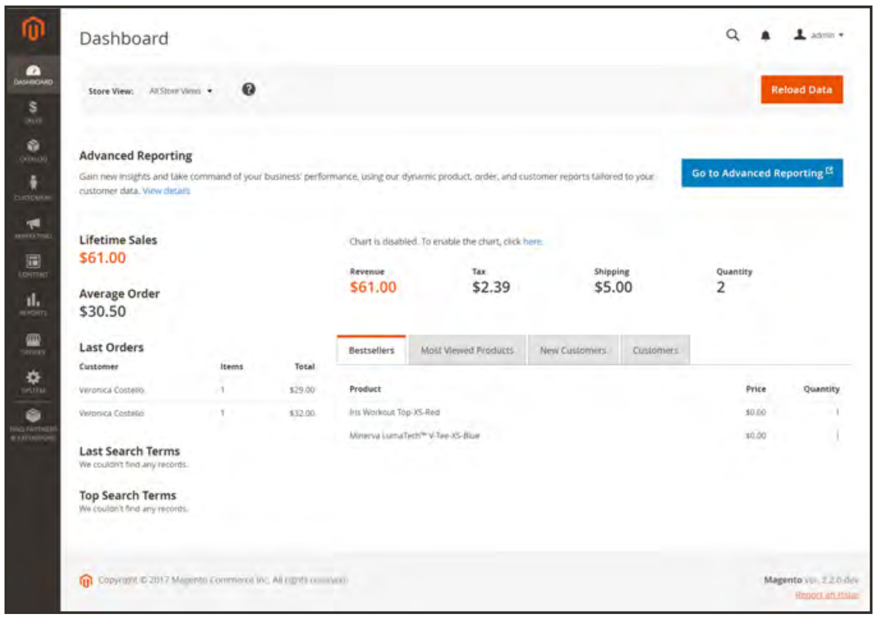
Contents

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

CHAPTER 5:

Store Admin

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



Admin Sidebar and Dashboard

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

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

Admin Sign In

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

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

Admin Sign In

To sign in to the Admin:

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

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

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

2. Enter your Admin **User Name** and **Password**.

3. Tap **Login**.

To reset your password:

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

Forgot Password

2. Tap **Retrieve Password**.

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

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

To sign out of the Admin:

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

Sign Out

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

Admin Password Requirements

FIELD	DESCRIPTION
Password	An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: Configuring Admin Security.

Your Admin Account

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

To edit your account information:

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

Account Information

Admin Sidebar

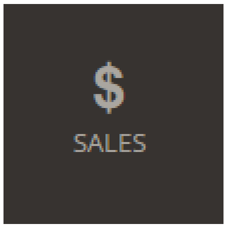
The sidebar on the left is the main menu for your store's Admin, and is designed for both desktop and mobile devices. The flyout menu provides access to all the tools you need to manage your store on a daily basis.

Admin Startup Page

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

Dashboard

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



Sales

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

Catalog

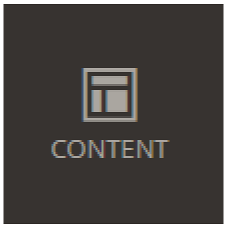
The Catalog menu is used to create products and define categories.goo

Customers

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

Marketing

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



Content

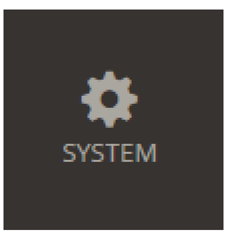
The Content menu is where you manage the content elements and design of your store. You will learn how to create pages, blocks, and frontend apps, and manage the presentation of your store.

Reports

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

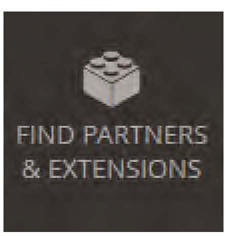
Stores

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



System

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

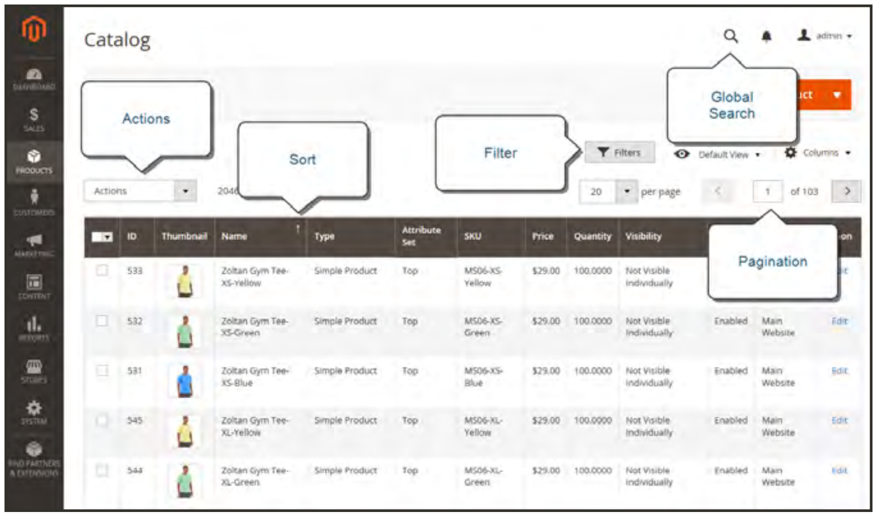


Find Partners & Extensions

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

Admin Workspace

The Admin workspace provides access to all the tools, data, and content that you need to run your store. The default start up page can be set in the configuration. Many Admin pages have a grid that lists the data for the section, with a set of tools to search, sort, filter, select, and apply actions. By default, the Dashboard is the startup page for the Admin. However, you can choose any other page to appear as the startup page when you log in. You can tap the Magento logo in the Admin sidebar to return to the Admin startup page.



Admin Workspace

To change the Admin startup page:

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

Startup Page

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

Workspace Controls

CONTROL	DESCRIPTION
Search	The Global Search box can be used to find any value in the database, including product, customer, and order records.
Sort	The header of each column can be used to sort the list in ascending or descending order.
Filters	Defines a set of search parameters that determines the records that appear in the grid. In addition, the filters in the header of some columns can be used to limit the list to specific values. Some filters have additional options that can be selected from a list box, and for others, you can simply type the value you want to find.
Default View	Determines the default column layout of the grid.
Columns	Determines the selection of columns and their order in the grid. The column layout can be changed. and saved as a "view." By default, only some of the columns are included in the grid.
Paginate	The pagination controls are used to view the additional pages of results.
Actions	The Actions control applies an operation to all selected records. To select individual records, mark the checkbox in the first column of each row, or use the Select control.
Select	The Select control is used to select multiple records that are to be the target of action. Options: Select All / Deselect All

Potential Startup Pages

SIDEBAR	PAGES	
Dashboard		
Sales	Operations	Orders Invoices Shipments Credit Memos Returns Billing Agreements Transactions
	Archive	Orders

Potential Startup Pages (cont.)

SIDEBAR	PAGES	
		Invoices Shipments Credit Memos
Catalog	Products Categories	
Customers	All Customers Now Online Segments	
Marketing	Promotions	Catalog Price Rules Related Products Rules Cart Price Rules Gift Card Accounts
	Private Sales	Events Invitations
	Communications	Email Templates Newsletter Template Newsletter Queue Newsletter Subscribers Email Reminders
	SEO & Search	URL Rewrites Search Terms Search Synonyms Site Map
	User Content	Reviews

Potential Startup Pages (cont.)

SIDEBAR	PAGES	
Content	Elements	Pages Hierarchy Blocks Banners Widgets
	Design	Configuration Themes Schedule
	Content Staging	Dashboard
Reports	Marketing	Products in Cart Search Terms Abandoned Carts Newsletter Problem Reports
	Reviews	By Customers By Products
	Sales	Orders Tax Invoiced Shipping Refunds Coupons PayPal Settlement Braintree Settlement
	Customers	Order Total Order Count New Wish Lists Segments
	Products	Views Bestsellers Low Stock Ordered

Potential Startup Pages (cont.)

SIDEBAR	PAGES	
		Downloads
	Private Sales	Invitations
		Invited Customers
		Conversions
	Statistics	Refresh Statistics
	Business Intelligence	Advanced Reporting
		BI Essentials
Stores	Settings	All Stores
		Configuration
		Terms and Conditions
		Order Status
	Taxes	Tax Rules
		Tax Zones and Rates
	Currency	Currency Rates
		Currency Symbols
	Attributes	Customer
		Customer Address
		Product
		Attribute Set
		Returns
		Rating
	Other Settings	Reward Exchange Rates
		Gift Wrapping
		Gift Registry
		Customer Groups

Potential Startup Pages (cont.)

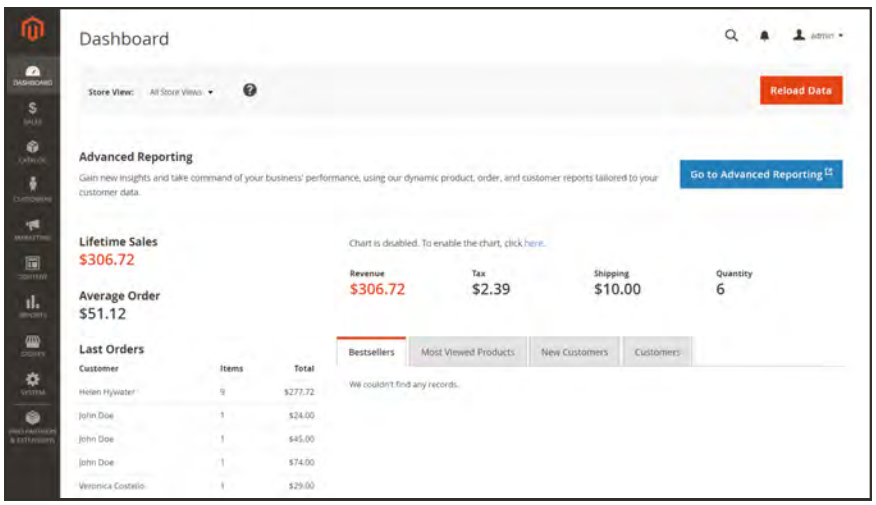
SIDEBAR	PAGES	
System	Data Transfer	Import Export Import/Export Tax Rates Import History Scheduled Import/Export
	Extensions	Integrations
	Tools	Cache Management Index Management Backups Web Setup Wizard
	Support	Data Collector System Report
	Permissions	All Users Locked Users User Roles
	Action Logs	Report Archive Bulk Actions
	Other Settings	Notifications Custom Variables Manage Encryption Key
Find Partners & Extensions		

Dashboard

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

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

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



Dashboard

To configure the chart:

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

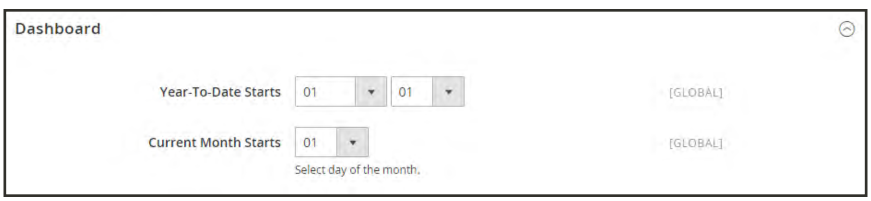
Enable Charts

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

Enable Charts

Set the Beginning Dates

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

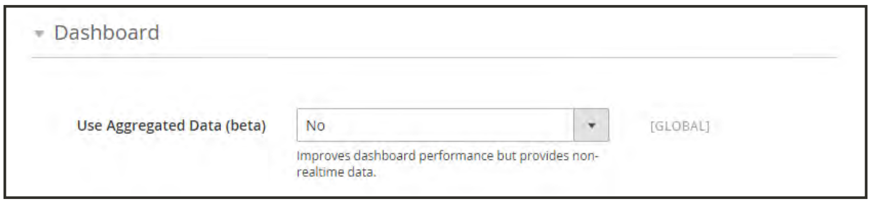


Beginning Date

Choose the Data Source

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

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



Data Source

Change the Startup Page

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

Startup Page

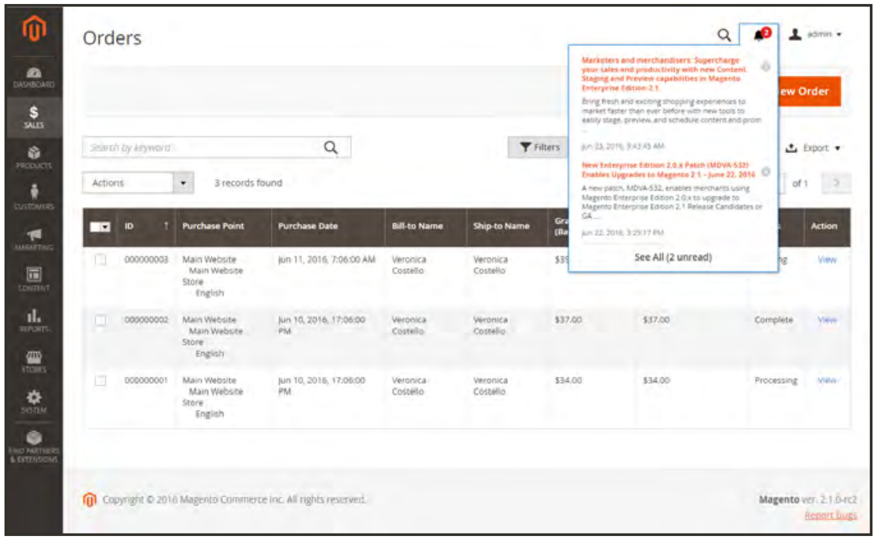
2. When complete, tap **Save Config**.

Dashboard Reports

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

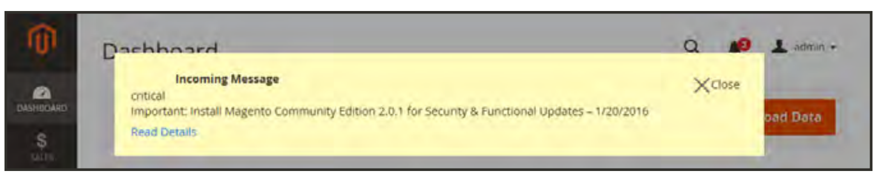
Message Inbox

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



Incoming Messages

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



Message of Critical Importance

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

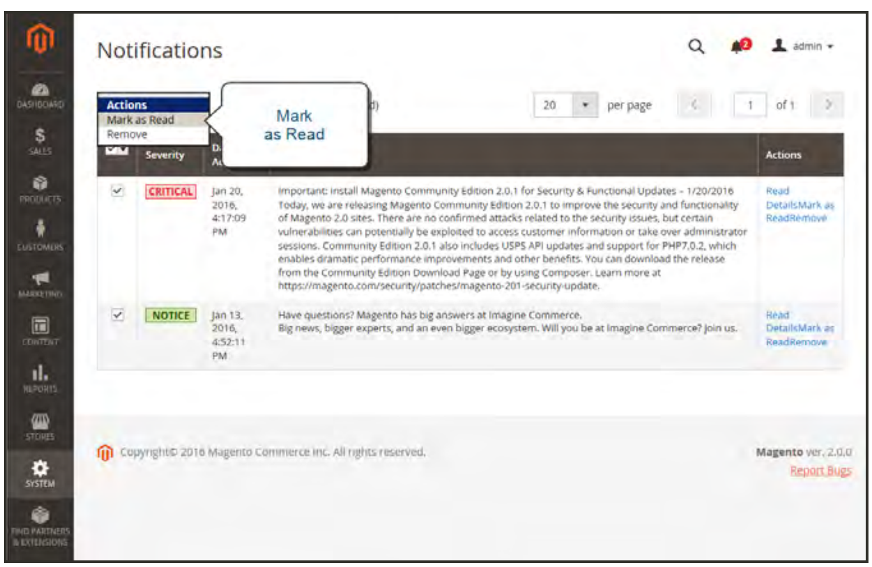
The configuration determines how often the inbox is updated, and how the messages are delivered. If your store Admin has a secure URL, notifications must be delivered over HTTPS.

To view incoming messages:

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

To view all notifications:

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



All Notifications

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

To configure notifications:

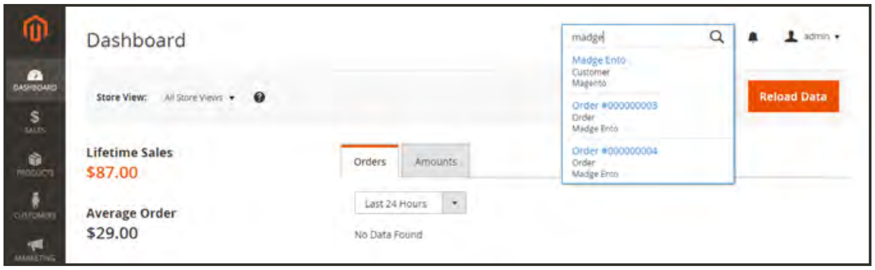
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down, and in the panel on the left under **Advanced**, choose **System**.
3. Expand the **Notifications** section, and do the following:
   a. If your store Admin runs over a secure URL, set **Use HTTPS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

Notifications

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

Global Search

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



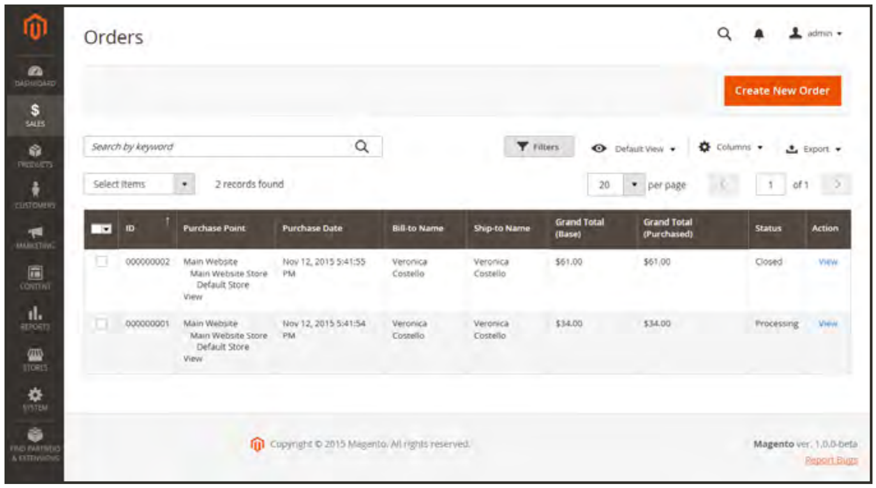
Search

To find a match:

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

Grid Controls

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



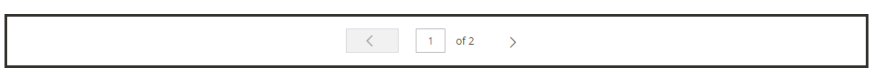
Orders Grid

To sort the list:

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

To paginate the list:

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

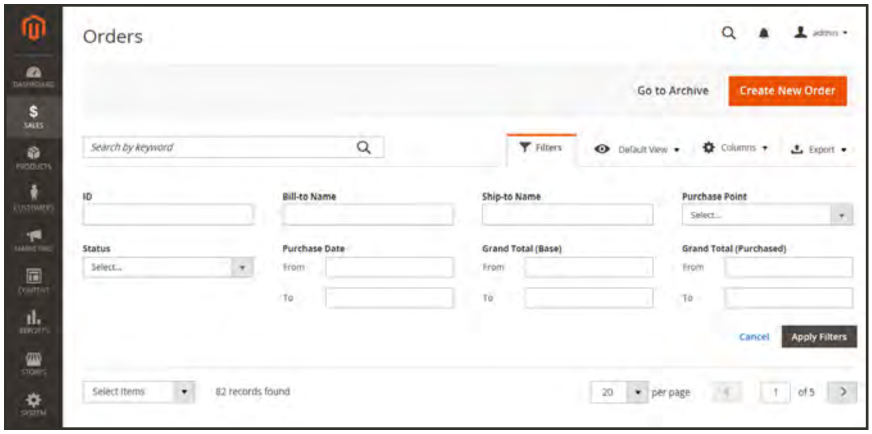


Next and Previous

To filter the list:

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

3. Tap **Apply Filters**.



Filter Controls

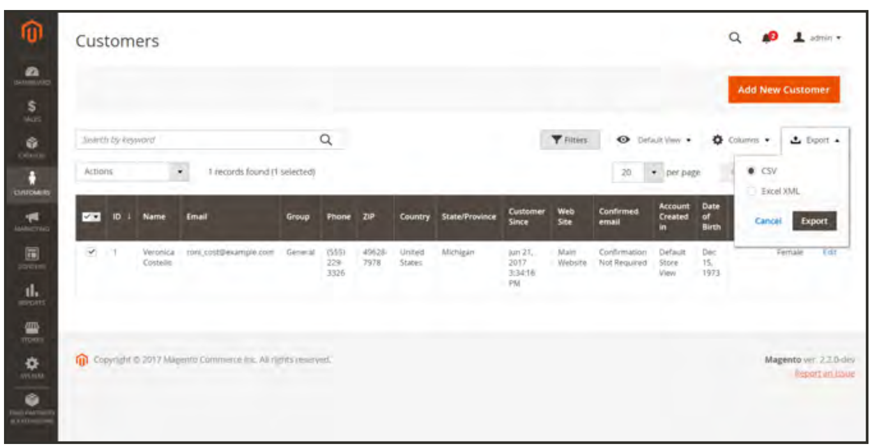
To export data:

1. Select the records that you want to export.

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

2. On the **Export** ( ) menu in the upper-right corner, choose one of the following file formats:

- CSV
- Excel XML



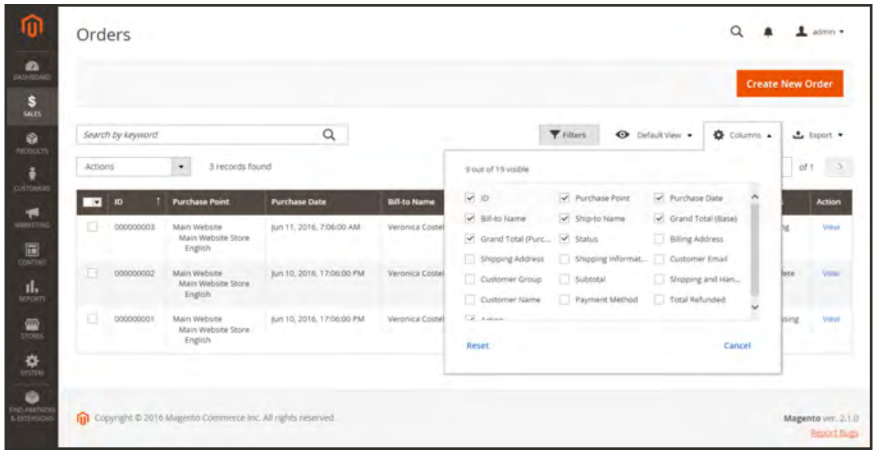
Export Control

3. Tap **Export**.

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

Grid Layout

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



Order Grid Columns

To change the selection of columns:

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

To move a column:

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

To save a grid view:

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

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

To change the grid view:

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

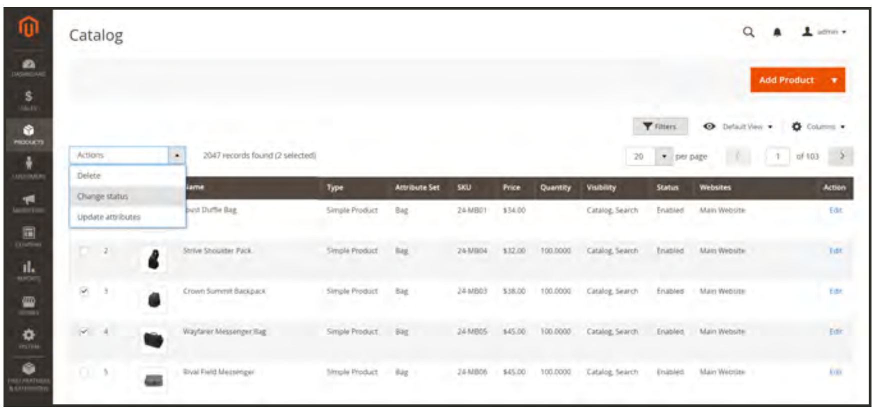
- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** (✎) icon. Then, update the name.

Actions Control

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

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

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



Applying an Action to Selected Records

Step 1: Select Records

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

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

Step 2: Apply an Action to Selected Records

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

Example: Update Attributes

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

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

Update Attributes

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

2. When complete, tap **Submit**.

Actions

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

Actions by Grid

MENU	LIST	ACTIONS
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 Shipments Print Shipping Labels
	Credit Memos	PDF Credit Memos
PRODUCTS		
	Catalog	Delete Change Status Update Attributes
CUSTOMERS		
	All Customers	Delete Subscribe to Newsletter Unsubscribe from Newsletter

Actions by Grid (cont.)

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

Actions by Grid (cont.)

MENU	LIST	ACTIONS
	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 Remove

Admin Session Lifetime

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

To set the session lifetime:

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

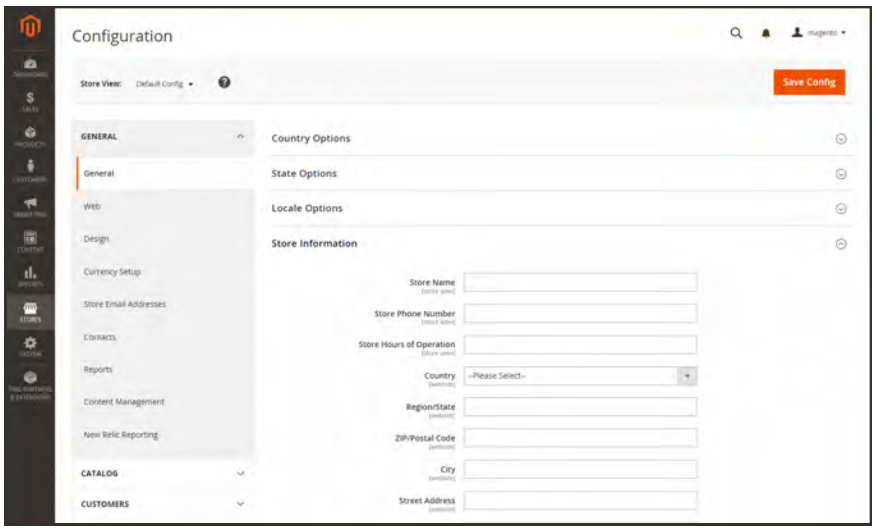
Security

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

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.



General Configuration

Store Information

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

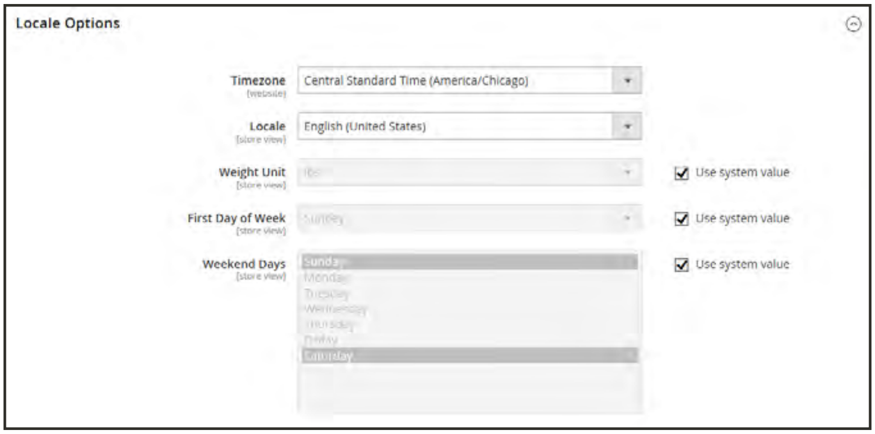
Store Information

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. In the **Store Hours of Operation** field, enter the hours your store is open for business. For example: Mon - Fri, 9-5, Sat 9-noon PST.
   d. Select the **Country** where your business is located.
   e. Select the **Region/State** with the country.
   f. Enter the **Store Address**. If the address is long, continue the address on **Store Address Line 2**.
   g. If applicable, enter the **VAT Number** of your store. To verify the number, click the **Validate VAT Number** button. To learn more, see: VAT ID Validation.
4. When complete, tap **Save Config**.

Locale Options

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



Locale Options

To set the store locale:

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

State Options

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

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

State Options

To set up the state options:

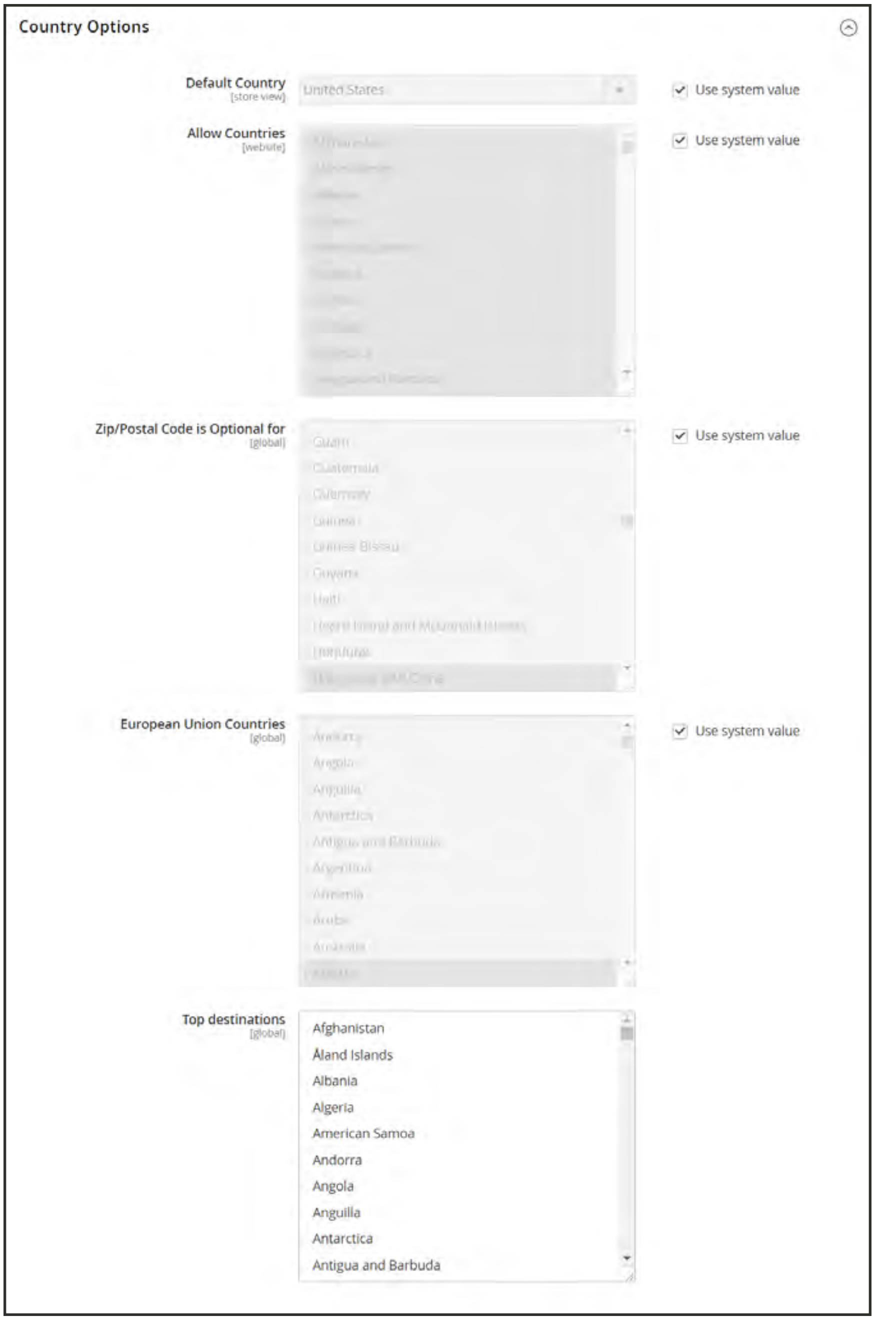
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand the **State Options** section, and do the following:
   a. In the **State is required for** list, select each country where Region/State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

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

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

Country Options

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



Country Options

To set the country options for your store:

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

Merchant Location

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

Merchant Location

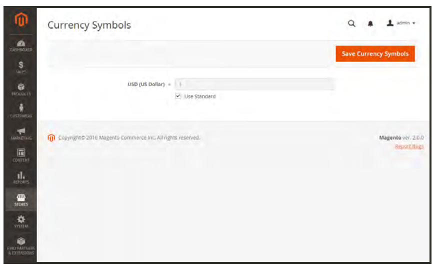
To enter the merchant location:

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

Currency

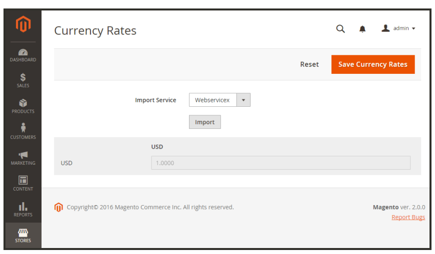
Currency Setup

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



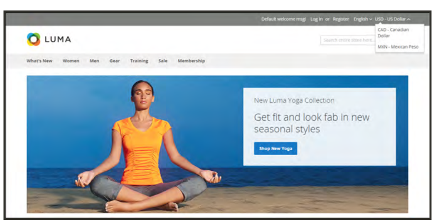
Currency Symbols

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



Updating Currency Rates

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



Currency Chooser

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

Store Email Addresses

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

- General Contact
- Sales Representative
- Customer Support

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

Process Overview:

Step 1: Set Up the Email Addresses for Your Domain

Step 2: Configure the Email Addresses for Your Store

Step 3: Update the Sales Email Configuration

Step 1: Set Up the Email Addresses for Your Domain

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

Step 2: Configure the Email Addresses for Your Store

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

General Contact

   a. In the **Sender Name** field, type the name of the person to appear as the sender of any email messages that is associated with the General Contact identity.

   b. In the **Sender Email** field, type the associated email address.

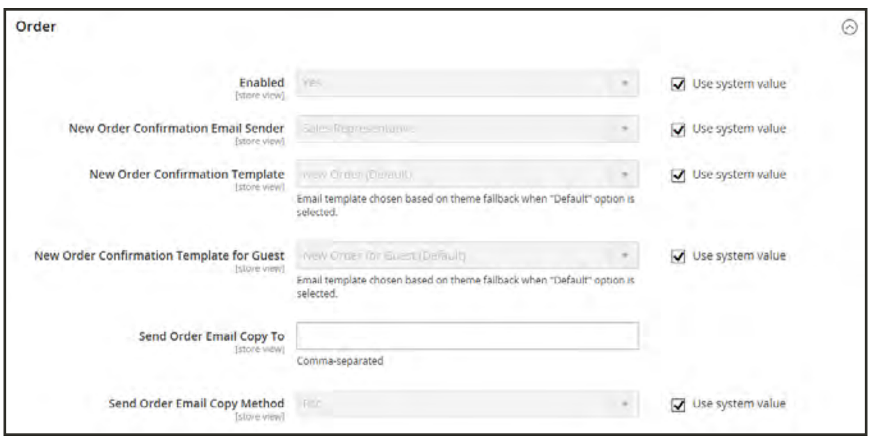
4. Repeat this process for each store email addresses that you plan to use.
5. When complete, tap **Save Config**.

Step 3: Update the Sales Email Configuration

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

1. In the panel on the left, under **Sales**, choose **Sales Emails**. The page has a separate section for each of the following:
   - Order and Order Comments
   - Invoice and Invoice Comments
   - Shipment and Shipment Comments
   - Credit Memo and Credit Memo Comments
   - RMA, RMA Authorization, RMA Admin Comments, and RMA Customer Comments

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



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

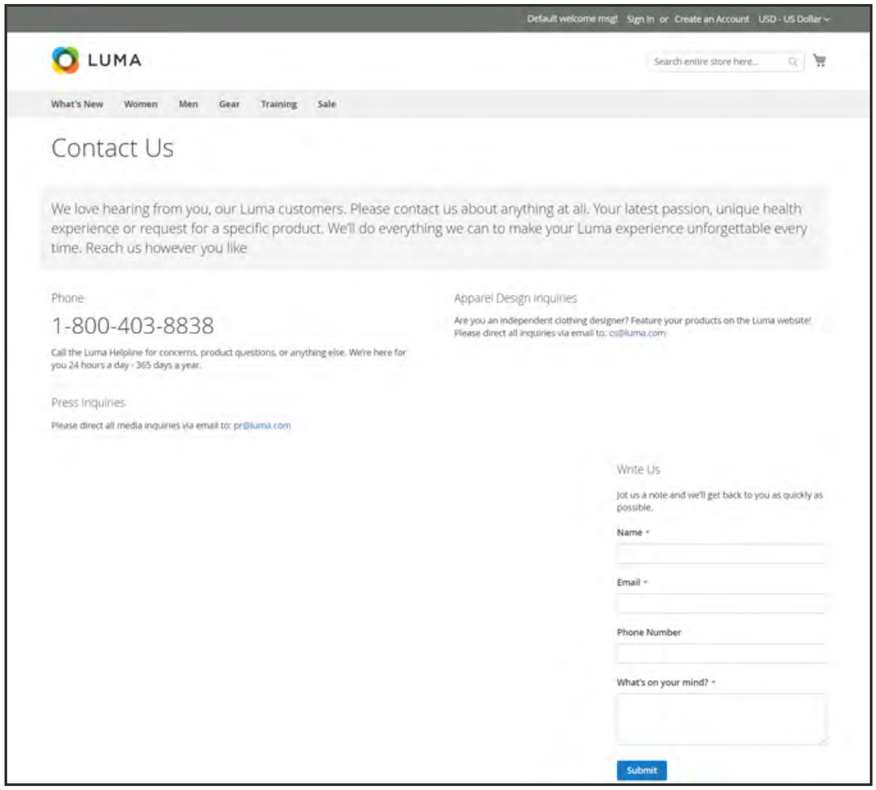
It is important to understand that the default Contact Us form is rendered directly from code rather than from a CMS page.

Default Contact Us Page

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

Contact Us Link in Footer

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



Contact Us Page

To configure Contact Us:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Contacts**.
3. Expand the **Contact Us** section. If necessary, set **Enable Contact Us** to "Yes."

Contact Us

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

Email Options

   a. In the **Send Emails to** field, enter the email address where messages from the Contact Us form are sent.

   b. Set **Email Sender** to the store identity that appears as the sender of the message from the Contact Us form. For example: Custom Email 2.

   c. Set **Email Template** to the template that is used for messages sent from the Contact Us form.

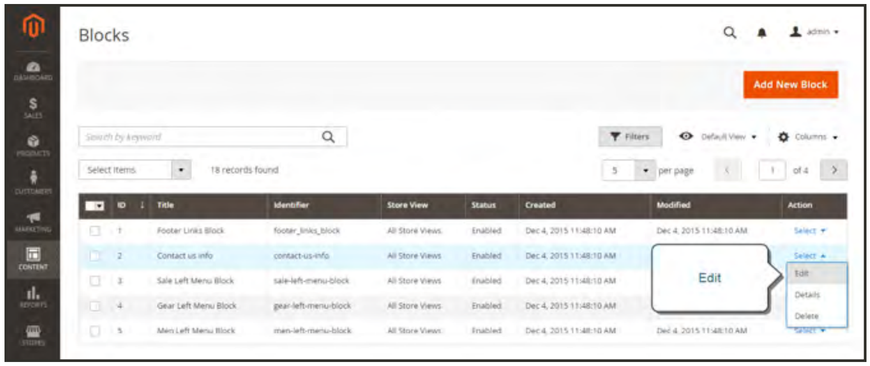
5. When compete, tap **Save Config**.

To customize the content:

Method 1: Using Sample Data

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

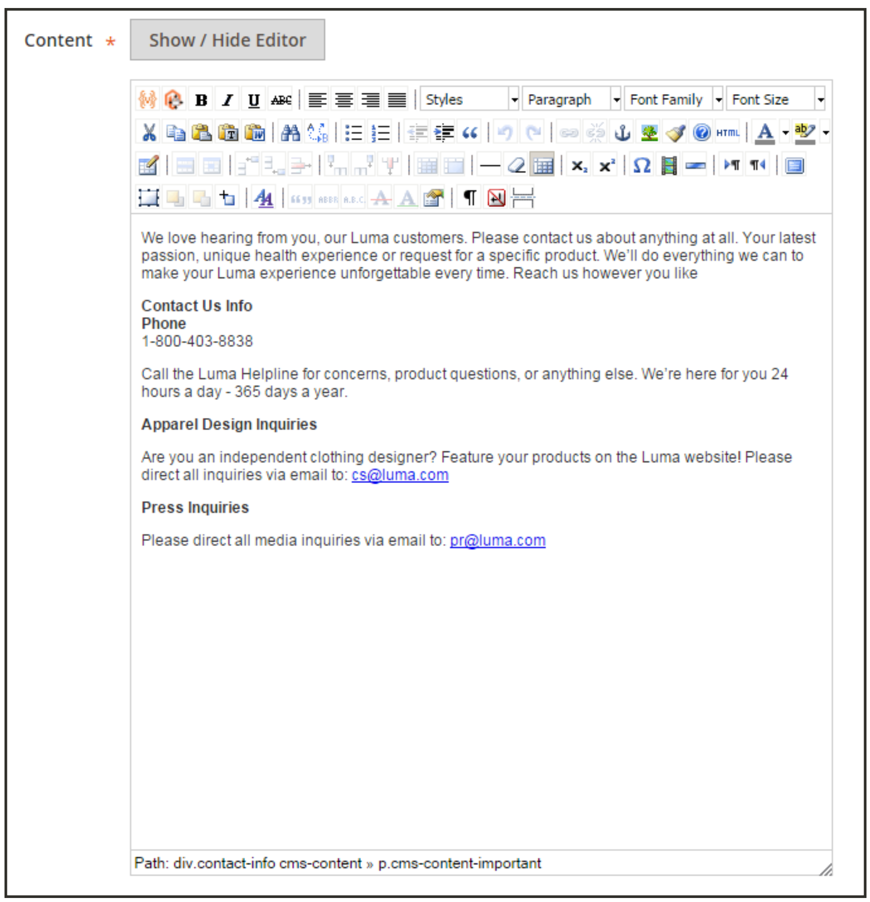
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. Find the **Contact Us Info** block in the list, and open in **Edit** mode.



Contact Us Info

3. Scroll down to the **Content** field, and make any changes necessary.

- Use the editor toolbar to format the text, and add images and links.
- Tap **Show / Hide Editor** to work directly with the HTML.



Contact Us Demo Content

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

Method 2: Without Sample Data

1. To create a CMS page for the Contact Us form, do the following:

   a. Follow the standard instructions to create a new page, with the following settings:

Page Title:	Contact Us
Content Heading:	Contact Us

   b. Under **Search Engine Optimization**, enter the following settings:

URL Key:	contact
Meta Tile:	Contact Us

   c. Under **Design**, set **Layout** to "1 column."

2. Under **Content**, do the following:

   a. Add any information that you want to include. The content that you enter will appear to the left of the form.

   a. If you want to align your content with the top of the form, enclose it in a <div> tag that floats left as shown in the following example:

   Example

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

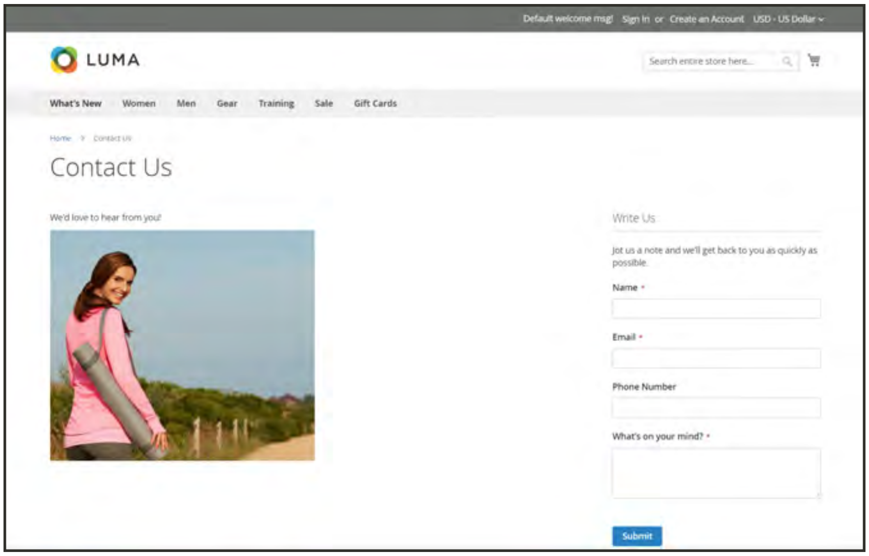
   b. Tap **Show / Hide Editor** to remove the toolbar. Then, paste the following code on a line below the content that you entered in the last step.

   "Contact Us"

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

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

   Your custom form now appears instead of the default form whenever the Contact Us link in the footer is clicked. Make sure to test your content on a mobile device to ensure that it renders correctly.

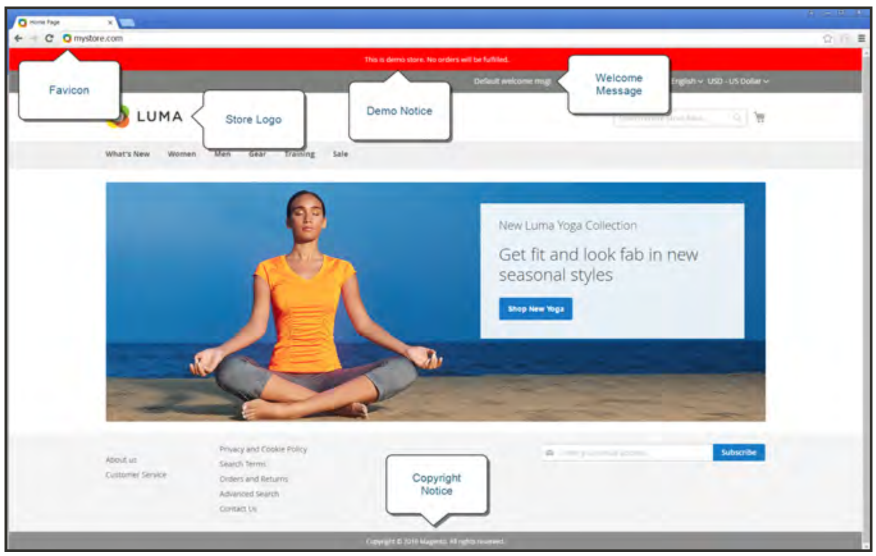


Contact Us Custom Page

CHAPTER 7:

Storefront Branding

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



Storefront Branding

Uploading Your Logo

The size and location of the logo in the header is determined by the store's theme. Your logo can be saved as either a GIF, PNG, or JPG (JPEG) file type, and uploaded from the Admin of your store.

Logo in Header

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

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

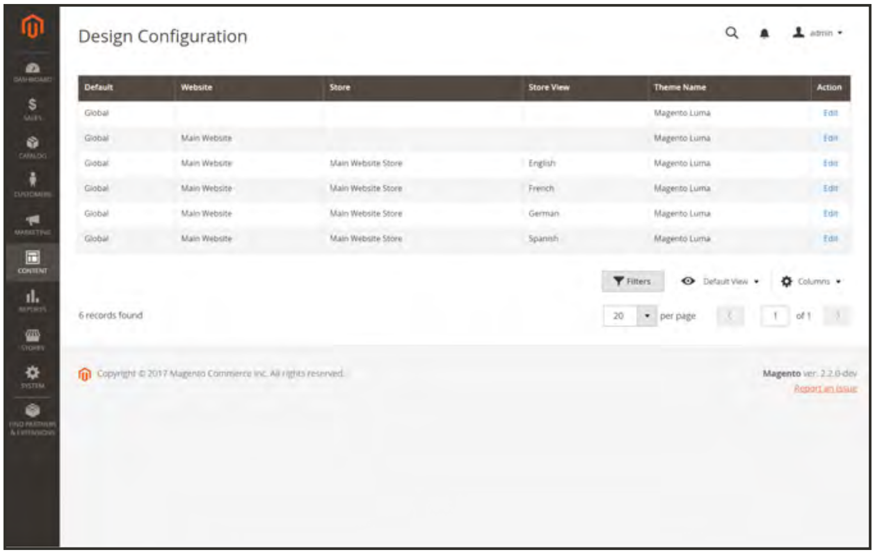
Relative path: `images/logo.gif`

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

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

To upload your logo:

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



Design Configuration

2. Find the store view that you want to configure, and in the **Action** column, click **Edit**.

3. Expand the **Header** section. Then, do the following:

Header

   a. To upload a new logo, tap **Upload**. Then, choose the file from your computer.

   b. Enter the **Logo Image Width** and **Logo Image Height**.

   c. In the **Logo Image Alt** field, enter the text that you want to appear when someone hovers over the image.

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

Logo File Formats

FILE FORMAT	DESCRIPTION
PNG	(Portable Network Graphics) This newer alternative to the GIF format supports up to 16 million colors (24 bit). The lossless compression format produces a high-quality bitmap image with crisp text, but a larger file size than some formats. The PNG format supports transparent layers, and is designed to be both viewed and streamed online.
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.

Adding a Favicon

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

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

Favicon in Address Bar

Process Overview:

Step 1: Create a Favicon

Step 2: Upload the Favicon to Your Store

Step 3: Refresh the Cache

Step 1: Create a Favicon

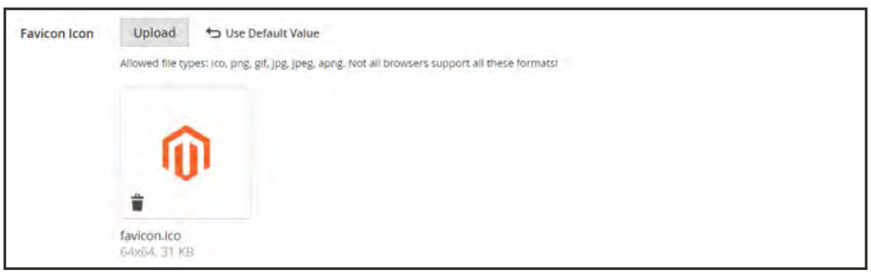
1. Create a 16 x 16 or 32 x 32 graphic image of your logo, using the image editor of your choice.
2. (Optional) Use one of the available online tools to convert the file to the .ico format. Then, save the file to your computer.

Step 2: Upload the Favicon to Your Store

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

HTML Head

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



Favicon

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

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

Step 3: Refresh the Cache

1. When prompted to refresh the cache, click the **Cache Management** link in the message at the top of the workspace.

2. In the list, mark the **Page Cache** checkbox that is marked “Invalidated.”

3. Set **Actions** to “Refresh.” Then, tap **Submit**.

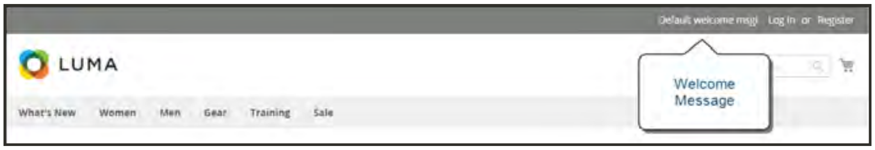
4. To view the new favicon, return to your storefront and press **F5** to refresh the browser.

Favicon File Formats

FILE FORMAT	DESCRIPTION
PNG	(Portable Network Graphics) This newer alternative to the GIF format supports up to 16 million colors (24 bit). The lossless compression format produces a high-quality bitmap image with crisp text, but a larger file size than some formats. The PNG format supports transparent layers, and is designed to be both viewed and streamed online.
APNG	(Animated Portable Network Graphics) A file format similar to PNG that supports 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.

Welcome Message

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

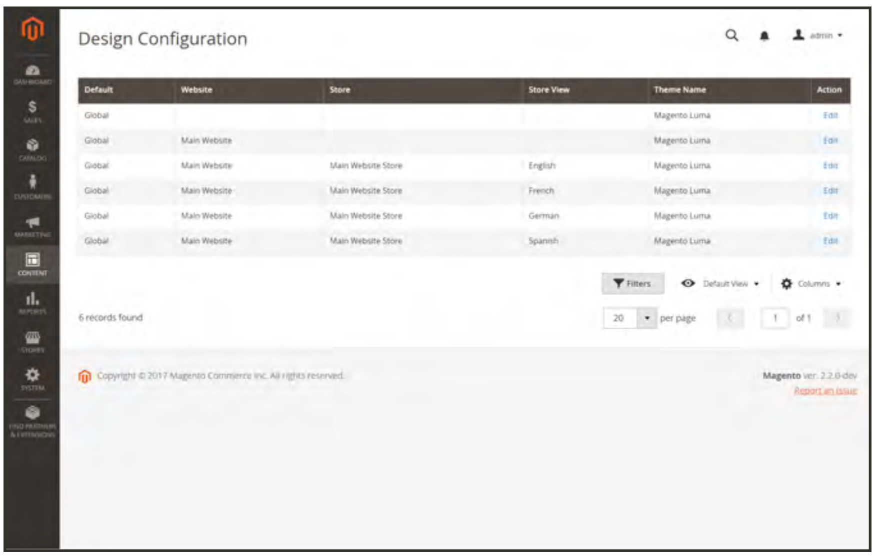


Welcome Message

To change the welcome message:

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

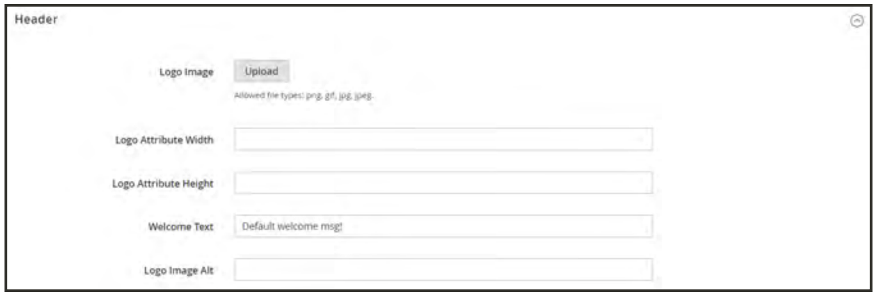
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**. Then, do the following:



Design Configuration

a. Under **Other Settings**, expand the **Header** section.

b. Enter the **Welcome Text** that you want to appear in the header of your store.



Header

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

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

Copyright Notice

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

Copyright Notice

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

Long Format Example

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

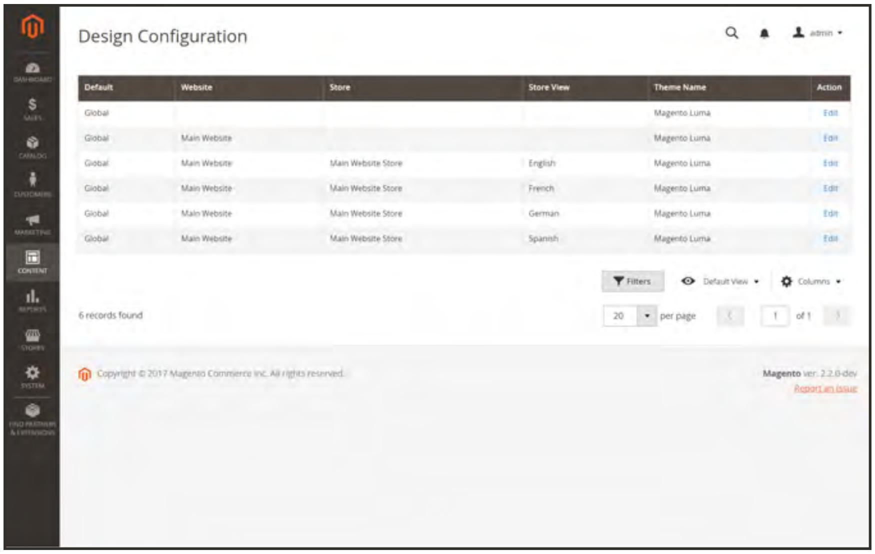
Short Format Example

```
&Copy; 2017 Magento, Inc. All rights reserved.
```

To change the copyright notice:

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

2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**, and do the following:



Design Configuration

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

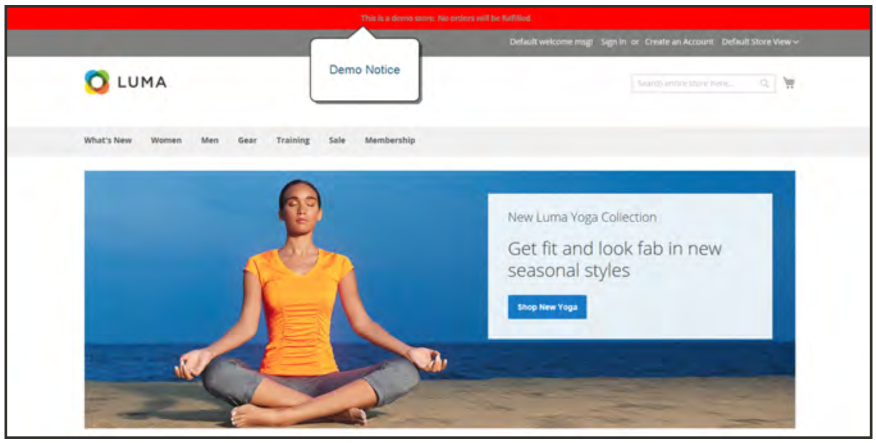
Footer

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

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

Store Demo Notice

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



Store Demo Notice

To set the store demo notice:

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

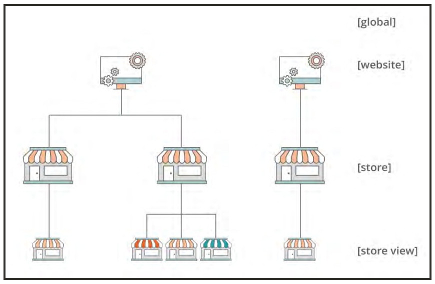
HTML Head

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

CHAPTER 8:

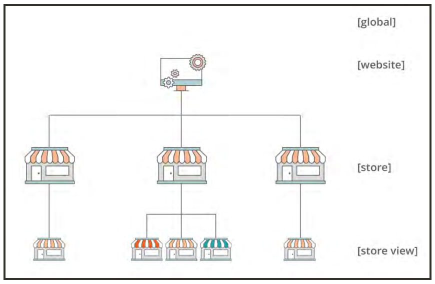
Websites, Stores & Views

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



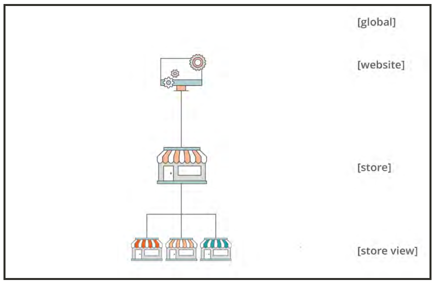
Websites

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



Stores

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



Store Views

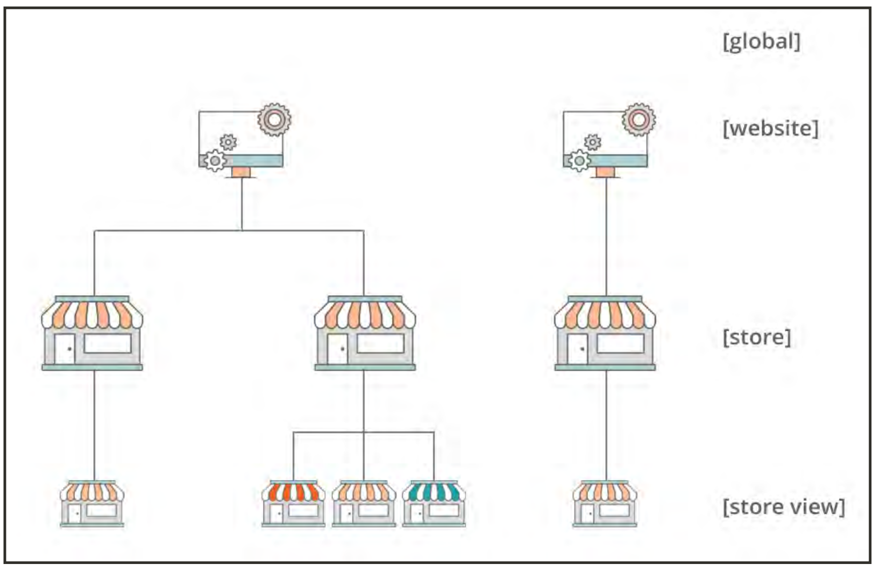
Each store that is available to customers is presented according to a specific "view". Initially, a store has a single default view. Additional store views can be added to support different languages, or for other purposes. Customers can use the language chooser in the header to change the store view.

Scope

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

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

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



Hierarchy of Websites, Stores, and Store Views

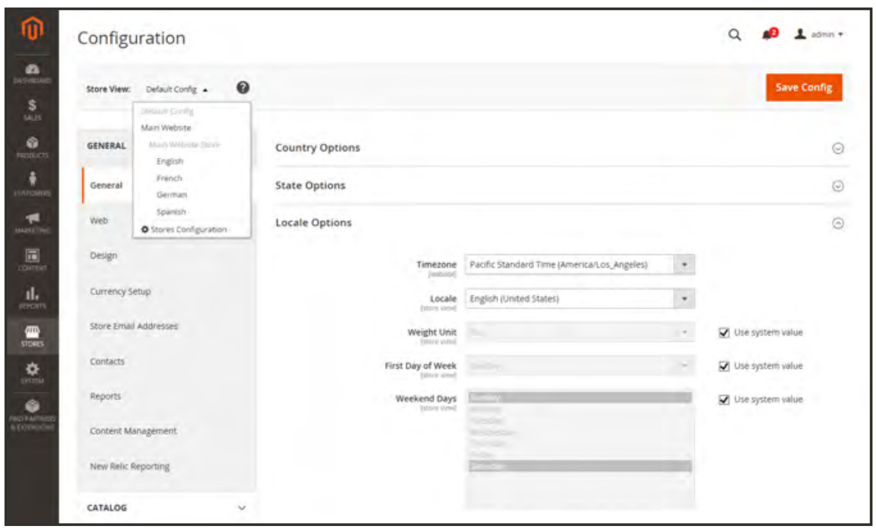
Scope Settings

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

Changing Scope

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

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



Default Config with "Use System Value" Checkboxes

To set the configuration scope:

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

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

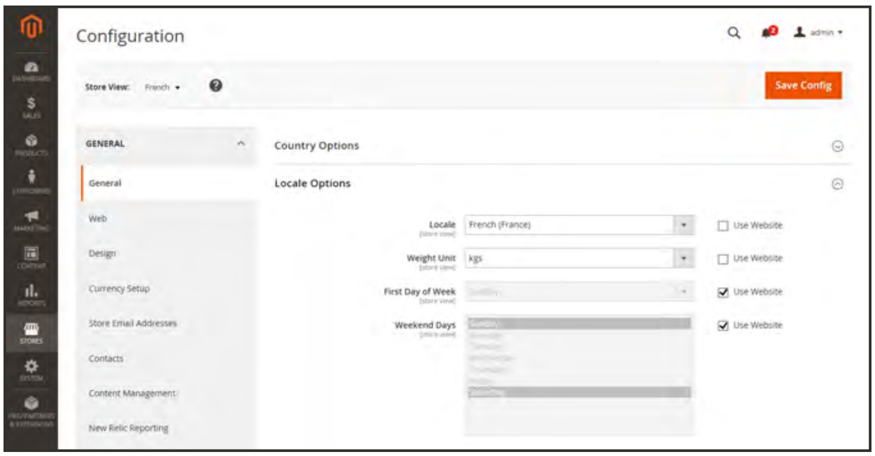
a. In the upper-left corner, set **Store View** to the specific view where the configuration applies. When prompted to confirm scope switching, tap **OK** .

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

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

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

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



Setting the Locale of the French Store View

Store Hierarchy

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

Default Value Options

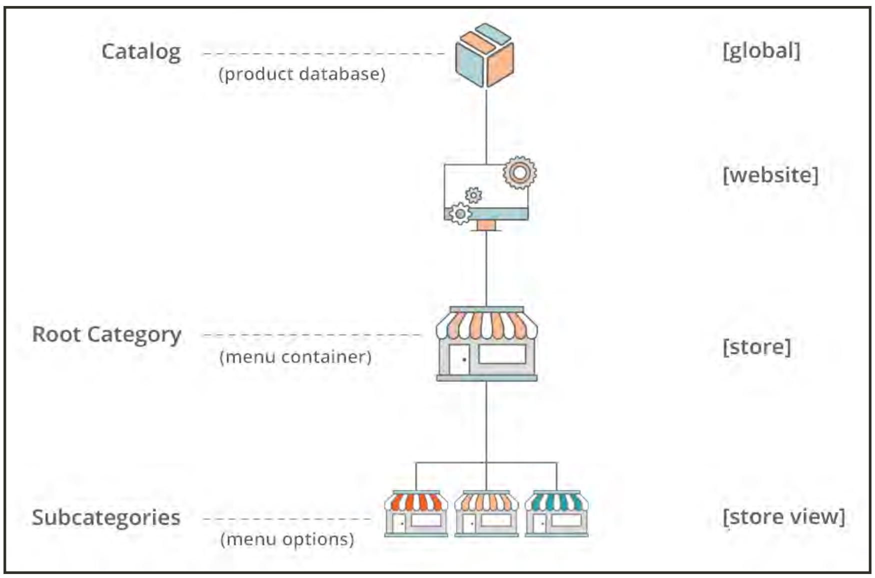
CHECKBOX	DESCRIPTION
Use system value	The “Use system value” checkbox appears when the configuration scope is set to “Default Config.”
Use Default	The “Use Default” checkbox appears when the configuration scope is set to “Main Website,” and refers to the default store that is assigned to the website.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

Catalog Scope

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

In sales, the term “catalog” usually refers to a curated selection of products that is available for sale. For example, a store might have a “Spring Catalog” and a “Fall Catalog”.

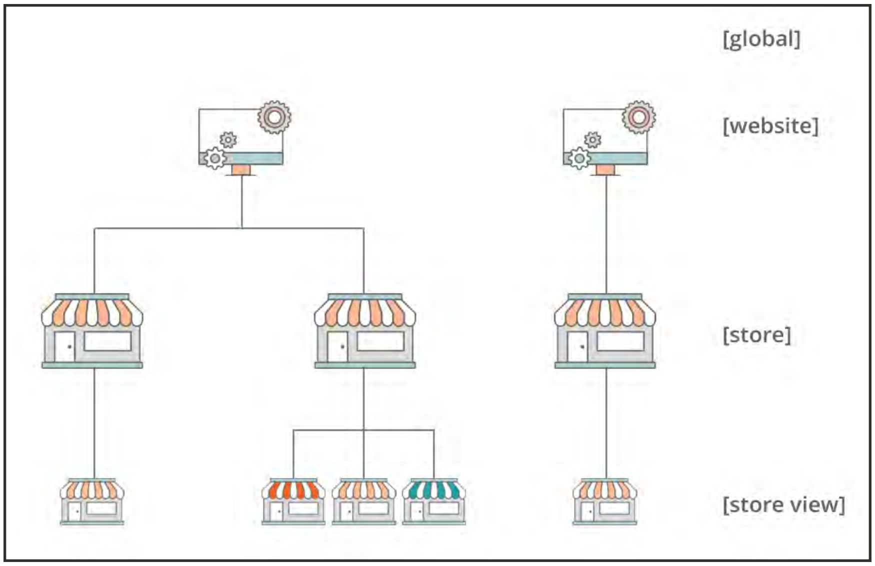
Like the table of contents of a printed catalog, the main menu of your store — or “top navigation” — organizes products by category to make it easy for customers to find what they want. The main menu is based on a “root category,” which is a container for the menu that is assigned to the store. Because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



Product Catalog in Store Hierarchy

Product Scope

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



Multisite Installation

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

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

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

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

To edit a product for a different view:

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

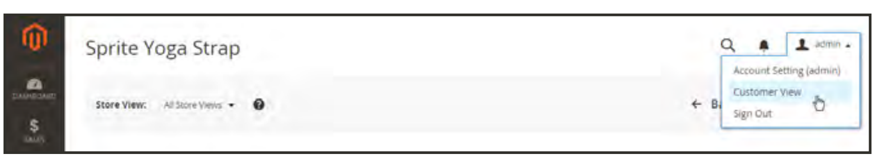
Store View

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

Translating Product Name for Spanish Store View

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

   a. In the upper-right corner, tap the **Admin** menu arrow. Then, choose **Customer View**.



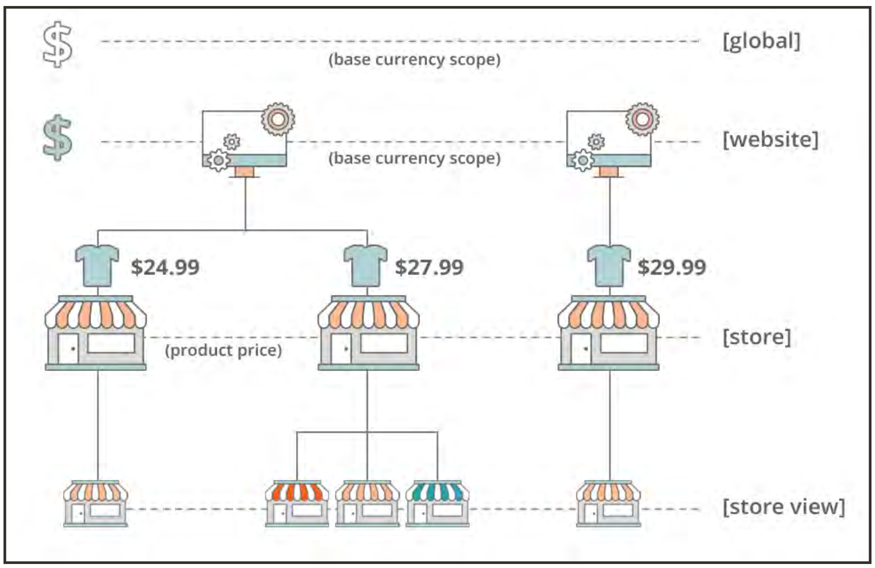
Customer View

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

Price Scope

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

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



Price Scope

To configure price scope:

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

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

Catalog Price Scope

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

Customer Account Scope

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

To set the scope of customer accounts:

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

Account Sharing Options

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

Global	Shares customer account information with every website and store in the Magento installation.
Per Website	Limits customer account information to the website where the account was created.

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

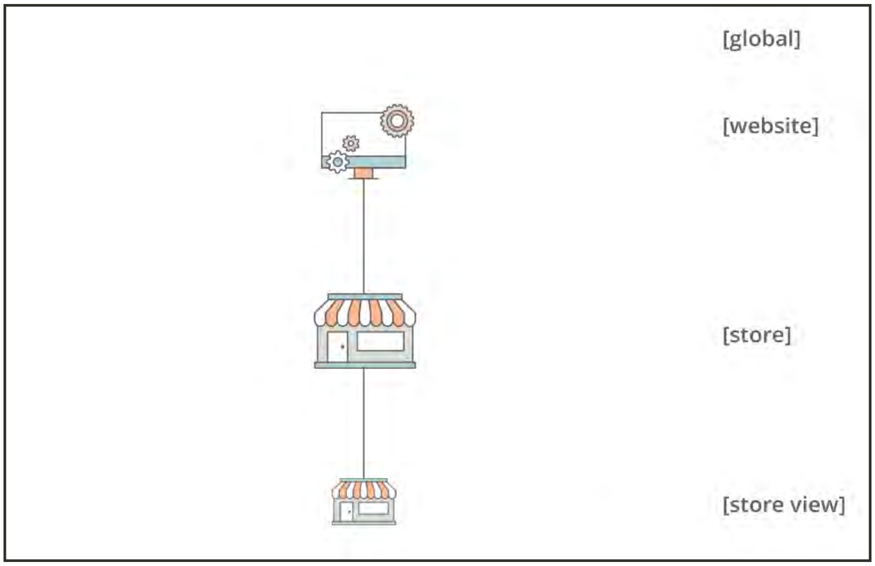
Scope Quick Reference

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

SCOPE	DESCRIPTION
Product Prices	Product prices can be configured to be applied at either a global or website level.
Payment Methods	Payment methods are configured at the website level, although the title and instructions can be configured for each store view.
Checkout	The checkout process takes place at the website level, although some display options can be configured for each store view. All stores associated with a website have the same checkout configuration.
STORE	
Root Category	Each store can have a separate set of products and main menu that is based on a “root” category and subcategories. Each catalog has a root category that is assigned at the store level.
STORE VIEW	
Subcategories	The subcategories that make up the main menu (under the root) are assigned at the store view level.
Locale	Each store view can be assigned a different locale. The display currency, units of measurement, and most of the Admin interface are specific to the locale.
Languages	To support multiple languages, all content, including product descriptions, must be translated for each store view.
Display Currency	A different display currency can be used for each store view, although the transactions are processed at the website level using the base currency.

Single Store Mode

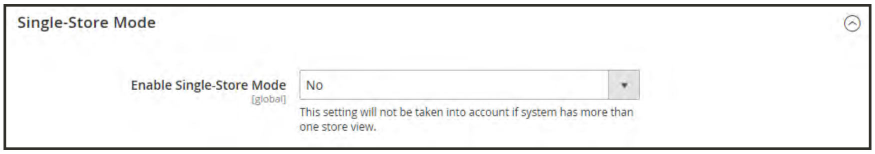
If your Magento installation has only a single store and store view, you can simplify the display by turning off all store view options and scope indicators. Most of the screenshots in this guide were taken with Single Store Mode disabled to show the scope indicator for each setting. Single Store Mode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



Single Website, Store, and View

To set single store mode:

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

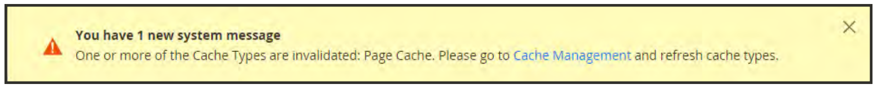


Single Store Mode

4. Tap **Save Config**.

5. When prompted to refresh the cache, do the following:

   a. Tap the **Cache Management** link in the system message at the top of the page.



System Message

   b. Mark the **Page Cache** checkbox.

   c. With **Actions** set to “Refresh,” tap **Submit**.

CHAPTER 9:

Industry Compliance

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

- Legal Requirements
- Industry Guidelines
- Best Practices

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

PCI Compliance Guidelines

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

PCI Requirements

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

To learn more, see: Magento Approach to PCI Compliance.

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

GDPR Compliance

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

All organizations that process personal data must disclose the following:

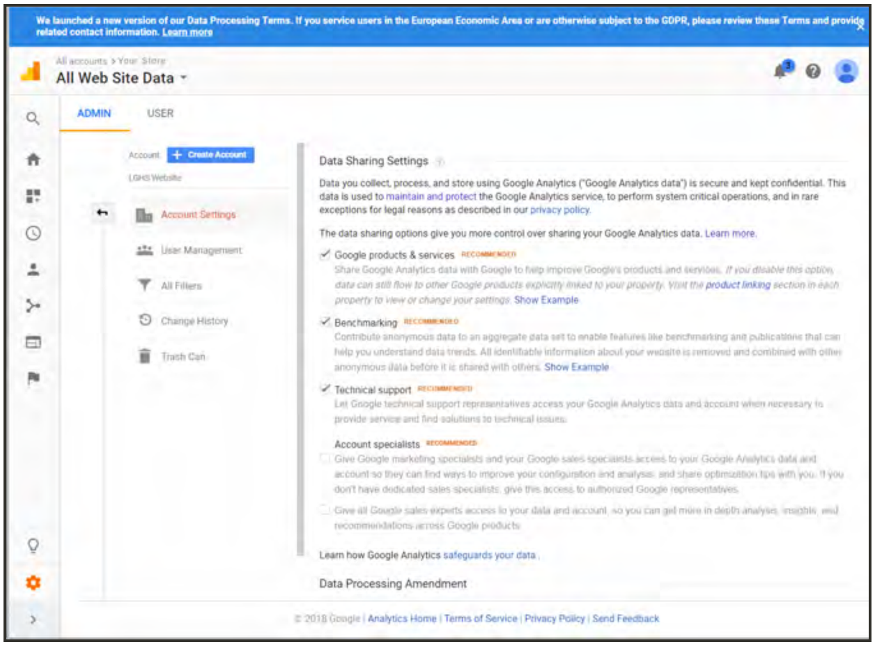
- The type of data that is collected
- The purpose for collecting the data
- The method that is used to collect the data
- How long the data is retained
- Whether or not the data is shared with others

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

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

Google Analytics Settings for GDPR

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



Google Data Sharing Settings

Step 1: Update Google Settings

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

Turn Off Data Sharing

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

- Google products & services
- Benchmarking
- Technical support
- Account specialists

Accept the Data Processing Amendment

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

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

Primary Contact	(Notification Email Address) The contact to whom notices are sent.
Data Protection Officer	(If applicable) The person who is designated to facilitate GDPR compliance,
EEA Representative	(If applicable) The person who represents customers outside of the EU regarding their GDPR obligations.

   b. When complete, tap **Add**.
   c. Repeat to add a contact for each role, if applicable.
6. When complete, tap **Save**.

Step 2: Modify Your Google JS Libraries

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

Anonymize IP Addresses

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

   analytics.js

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

   To learn more, see the Analytics.js Field Reference.

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

   ga.js

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

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

   gtag.js

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

   To learn more, see: IP Anonymization in Analytics in Google Help.

Force SSL

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

analytics.js

```
ga(’set’, ‘forceSSL’, true);
```

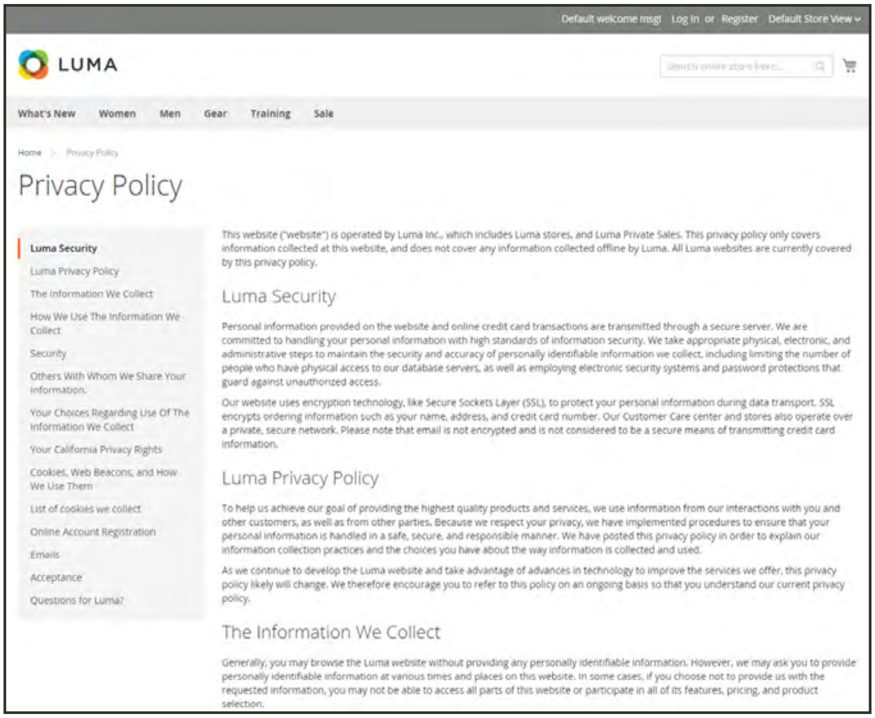
Step 3: Update Your Privacy Policy

Update your privacy policy to state that your company:

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

Privacy Policy

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

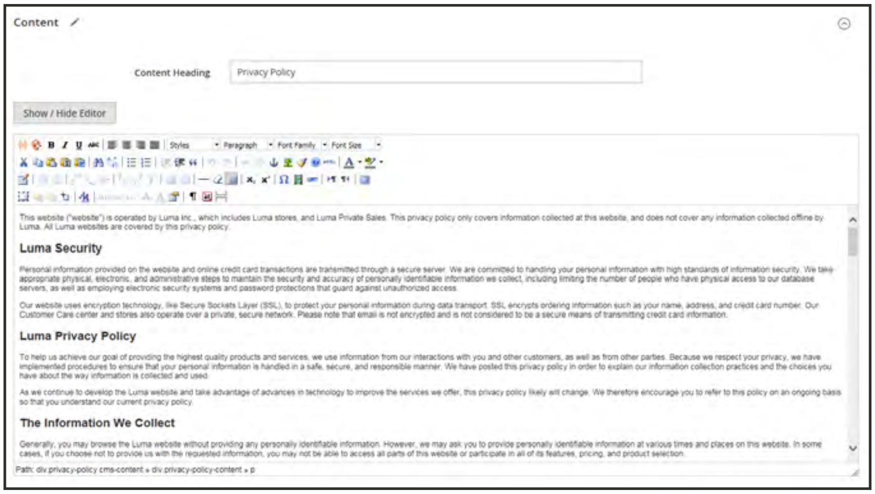


Privacy Policy

To edit your privacy policy:

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

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



Content

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

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

Cookie Law Compliance

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

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

Method 1: Implied Consent

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

Method 2: Expressed Consent

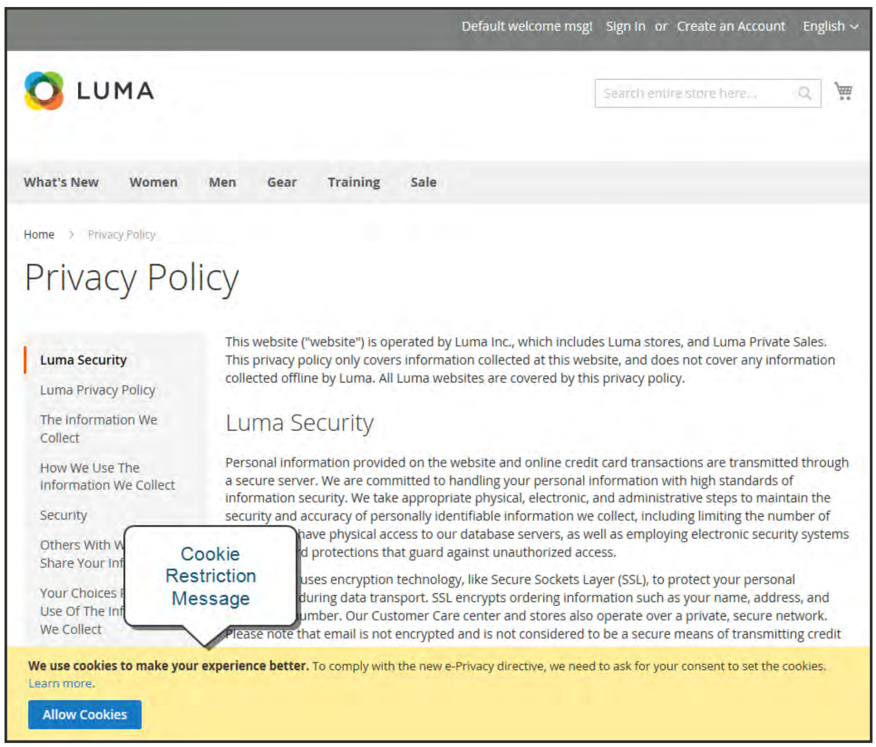
Operating your store in cookie restriction mode requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable. For example, if Google Analytics is available for your store, it can be invoked only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

Cookie Restriction Mode

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

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

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



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."

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

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

Step 2: Update Your Privacy Policy

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

Cookie Reference

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

Magento 2.x Default Cookies

The following cookies are used by Magento Commerce "out of the box" for on-premise and cloud installations. These cookies are required by functionality that is explicitly requested by the customer. To learn about the lifetime of session cookies, see: Customer Session Lifetime.

Requested Functionality Cookies (Exempt)

COOKIE NAME	
add_to_cart	(Used by Google Tag Manager) Captures the product SKU, name, price and quantity removed from the cart, and makes the information available for future integration by third-party scripts,
guest-view	Stores the Order ID that guest shoppers use to retrieve their order status.
login_redirect	Preserves the destination page the customer was navigating to before being directed to log in.
mage-banners-cache-storage	Stores banner content locally to improve performance.
mage-messages	Tracks error messages and other notifications that are shown to the user, such as the cookie consent message, and various error messages, The message is deleted from the cookie after it is shown to the shopper.
mage-translation-storage	Stores translated content when requested by the shopper.

Requested Functionality Cookies (Exempt) (cont.)

COOKIE NAME	
product_data_storage	
	Stores configuration for product data related to Recently Viewed / Compared Products.
recently_compared_product	
	Stores product IDs of recently compared products.
recently_compared_product_previous	
	Stores product IDs of previously compared products for easy navigation.
recently_viewed_product	
	Stores product IDs of recently viewed products for easy navigation.
recently_viewed_product_previous	
	Stores product IDs of recently previously viewed products for easy navigation.
remove_from_cart	
	(Used by Google Tag Manager) Captures the product SKU, name, price and quantity added to the cart, and makes the information available for future integration by third-party scripts.
stf	
	Records the time messages are sent by the SendFriend (Email a Friend) module.
X-Magento_Vary	
	Configuration setting that improves performance when using Varnish static content caching.

Persistent Customization Session Cookies (Exempt)

COOKIE NAME	
amz_auth_err	
	(Used by Amazon Pay) Value “1’ indicates an authorization error.
amz_auth_logout	
	(Used by Amazon Pay) Value “1” indicates that the user should be logged out.
form_key	
	A security measure that appends a random string to all form submissions to protect the data from Cross-Site Request Forgery (CSRF).
mage-cache-sessid	
	The value of this cookie triggers the cleanup of local cache storage. When the cookie is removed by the backend application, the Admin cleans up local storage, and sets the cookie value to “true.”
mage-cache-storage	
	Local storage of visitor-specific content that enables ecommerce functions.
mage-cache-storage-section-invalidation	
	Forces local storage of specific content sections that should be invalidated.
persistent_shopping_cart	
	Stores the key (ID) of persistent cart to make it possible to restore the cart for an anonymous shopper.
private_content_version	
	Appends a random, unique number and time to pages with customer content to prevent them from being cached on the server.
section_data_ids	

Persistent Customization Session Cookies (Exempt) (cont.)

COOKIE NAME	
	Stores customer-specific information related to shopper-initiated actions such as display wish list, checkout information, etc.
`store`	
	Tracks the specific store view / locale selected by the shopper.

Google Analytics Cookies

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

Google Universal Analytics Cookies (Non-Exempt)

JavaScript Libraries: gtag.js and analytics.js

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

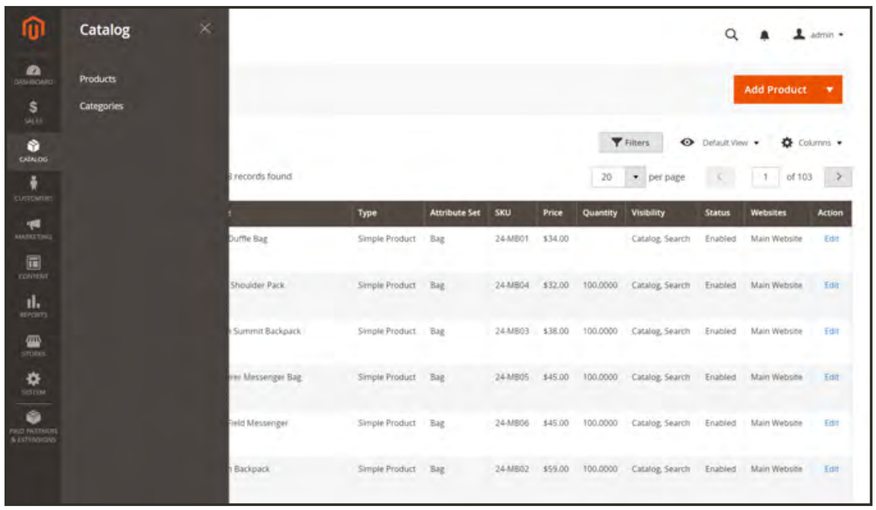
CATALOG

Contents

CHAPTER 10:

Catalog Menu

The Catalog Menu provides easy access to product creation, category and inventory management tools.

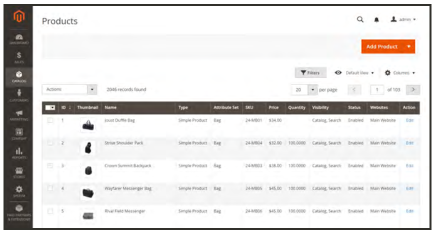


Catalog Menu

To display the Catalog menu:

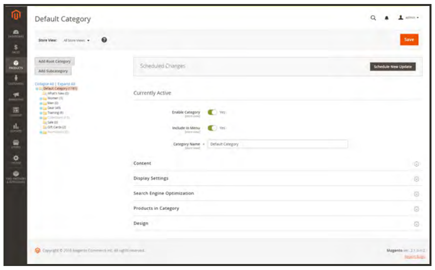
On the Admin sidebar, tap **Catalog**.

Menu Options



Products

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



Categories

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

Catalog URLs

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

URL Formats

Dynamic URL

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

```
http://mystore.com/catalogsearch/result/?q=racer+back

http://mystore.com/women/tops-women.html?style_general=135
```

Static URL

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

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

URL Components

URL Key

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

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

HTML Suffix

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

Because the suffix is controlled by the system configuration, you should never type it directly into the URL key of a category or product. (Doing so will result in a double suffix at the end of the URL.) Whether you decide to use the suffix or not, be consistent and use the same setting for all your product and category pages. Here are examples of URLs with—and withou—a suffix.

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

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

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

Category Path

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

URL with Category Path

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

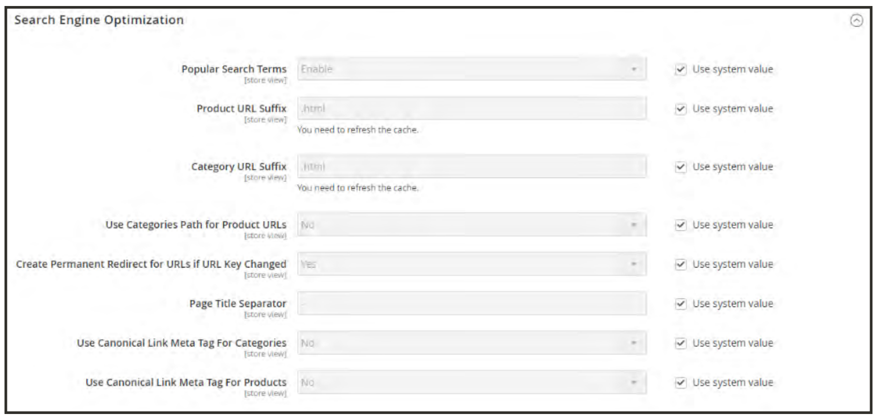
URL without Category Path

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

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

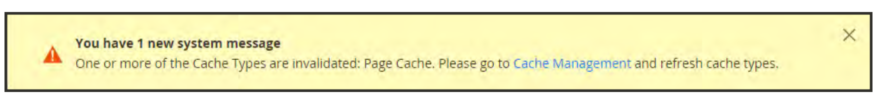
To configure catalog URLs:

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



Search Engine Optimization

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

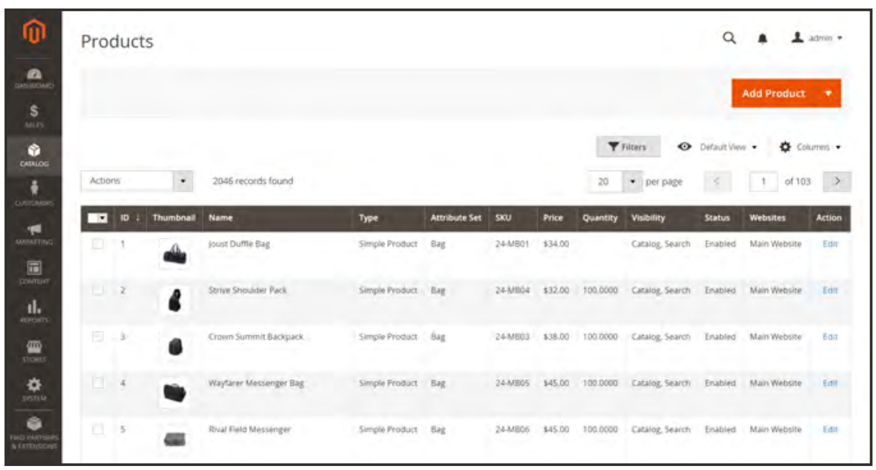
CHAPTER 11:

Products Grid

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

The Products grid lists all products in the catalog, indicates the website(s) where they are available, and if they are currently enabled for sale.

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



Products Grid

Workspace Controls

CONTROL	DESCRIPTION
Add Product	Initiates the process to create a new simple product. To choose a specific product type, click the down arrow. Options: Simple Product Configurable Product Grouped Product Virtual Product Bundle Product Downloadable Product Gift Card
Actions	Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Options: Delete Change Status Update Attributes
Filters	Initiates a catalog search based on the current filters.
[Default] View	Indicates the current grid column layout. If there are saved grid column views, you can choose another.
Columns	Lists all actions that can be applied to selected products in the list. To apply an action to a product or group of products, mark the checkbox in the first column of each product. Product list actions include: Delete Change Status Update Attributes Use the Columns control to customize the selection of columns in the grid.
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/Deselect All
Edit	Opens the product in edit mode. You can accomplish the same thing by clicking anywhere on the row.

Default Columns

COLUMN	DESCRIPTION
(Checkbox)	Selects multiple records to be subject to an action. The checkbox in the first column of each selected record is marked . Options: **Select All** — Selects all records found that match the current filter settings. **Select All on This Page** — Selects only the records found on the current page that match the filter settings.
ID	A unique, sequential number that is assigned when a new product is saved for the first time.
Thumbnail	Displays a thumbnail of the main product image.
Name	The product name.
Type	The product type.
Attribute Set	The name of the attribute set that is used as a template for the product.
SKU	The unique Stock Keeping Unit that is assigned to the product.
Price	The unit price of the product.
Quantity	The quantity that is currently in stock.
Visibility	Indicates where the product is visible in the catalog. Options: Not Visible Individually Catalog Search Catalog, Search
Status	Indicates the current status of the product. Options: Enabled Disabled
Websites	Indicates the website(s) where the product is available.
Action	Opens the product in Edit mode.

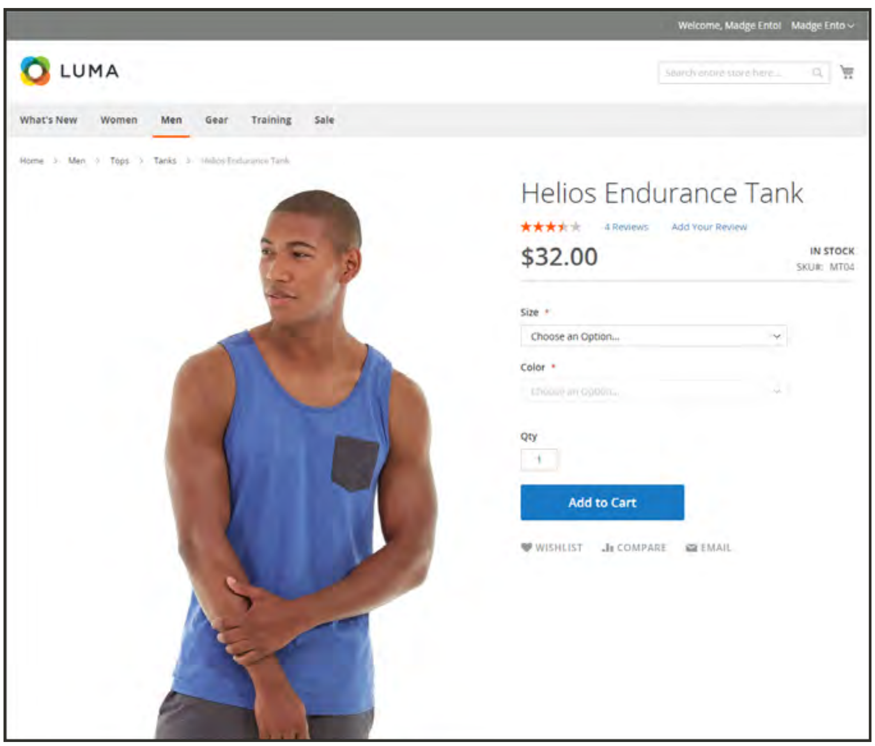
CHAPTER 12:

Creating Products

Choosing a product type is one of the first things you must do to create a new product. In this chapter, you will learn how to create a product of each type. In addition to the basic product types, the term, complex product[1] is sometimes used to refer to products with multiple options, such as a configurable product that is available in various colors and sizes. To learn more about the available options, see Product Settings and Advanced Settings.

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

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

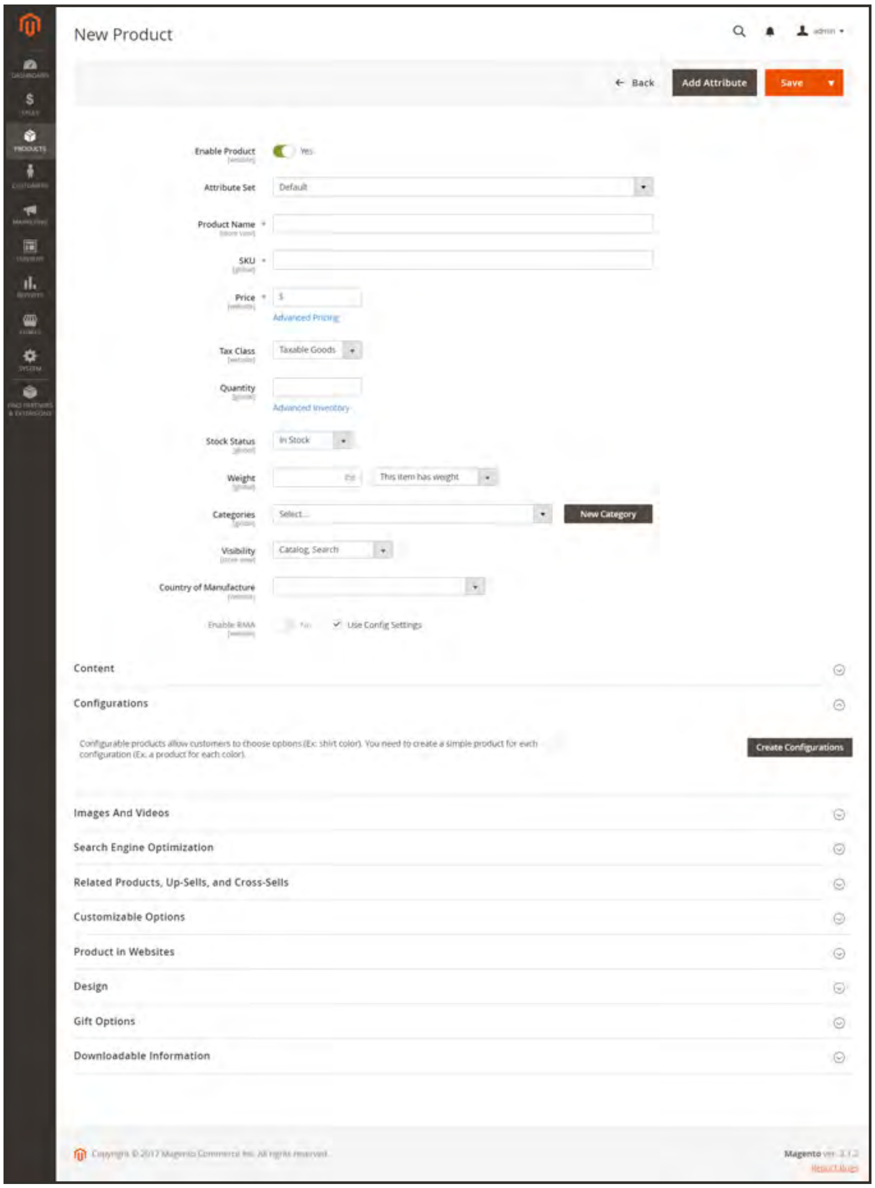


Product Catalog

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

Product Workspace

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



Product Workspace

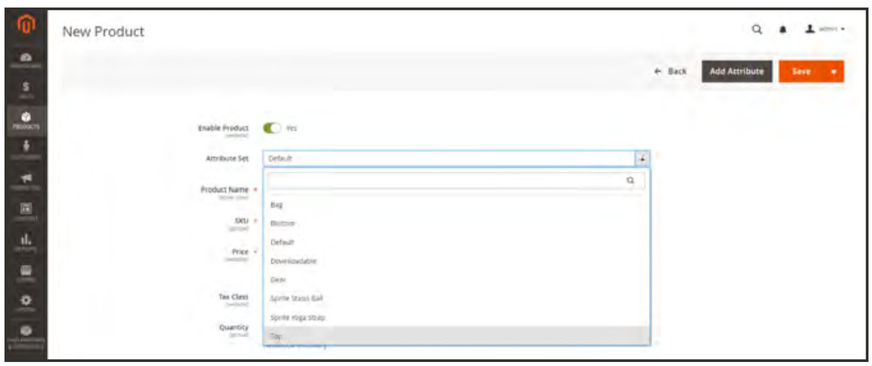
Enable Product

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

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

Attribute Set

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



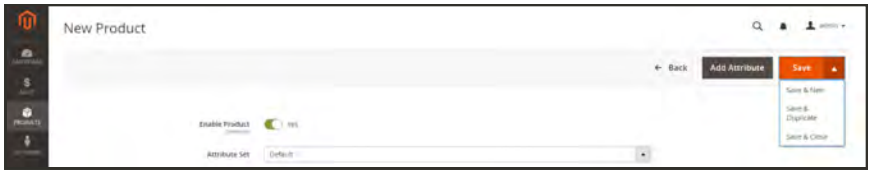
Attribute Sets

Expand/Collapse

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

Save Menu

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



Save Menu

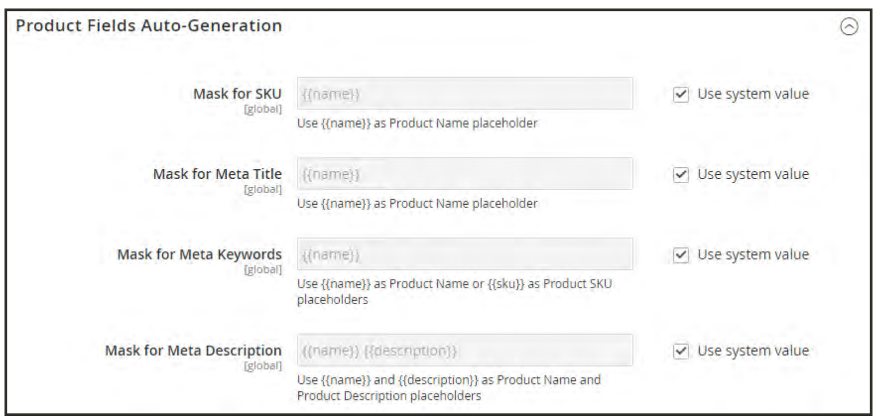
COMMAND	DESCRIPTION
Save	Save the current product, and continue working.
Save & New	Save and close the current product, and begin a new product, based on the same product type and template.
Save & Duplicate	Save and close the current product, and open a new duplicate copy.
Save & Close	Save the current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

Default Field Values

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

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

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



Product Fields Auto-Generation

To edit the placeholder value:

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

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

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

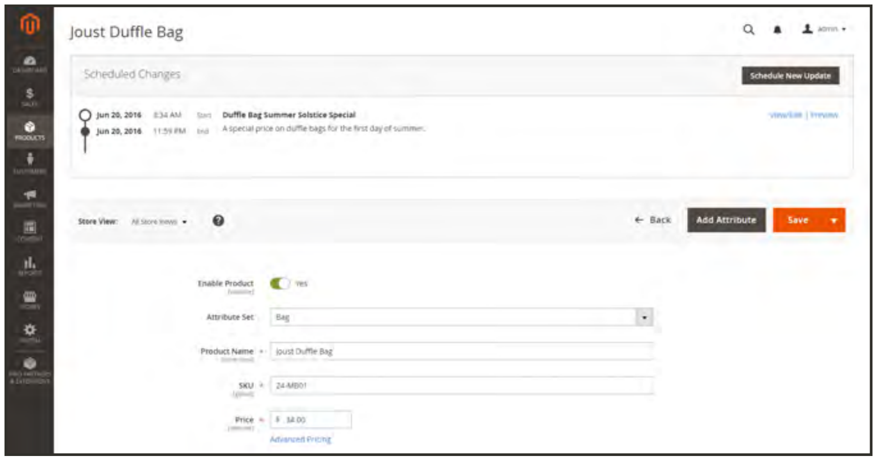
4. When complete, tap **Save Config**.

Common Placeholders

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

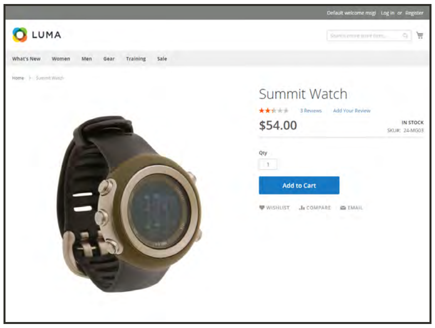
Scheduled Changes

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



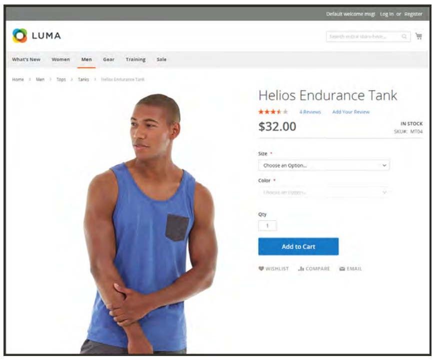
Scheduled Changes

Product Types



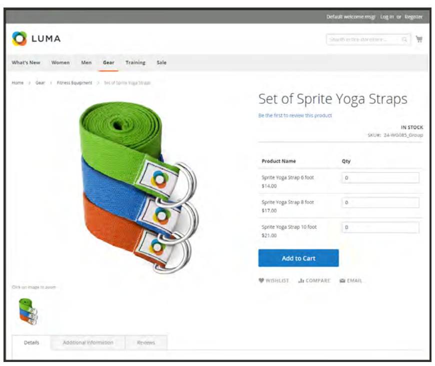
Simple Product

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



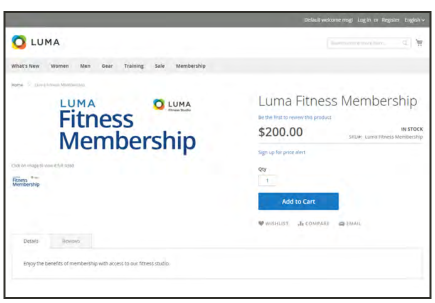
Configurable Product

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



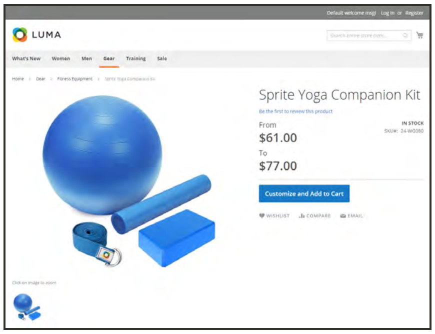
Grouped Product

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



Virtual Product

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

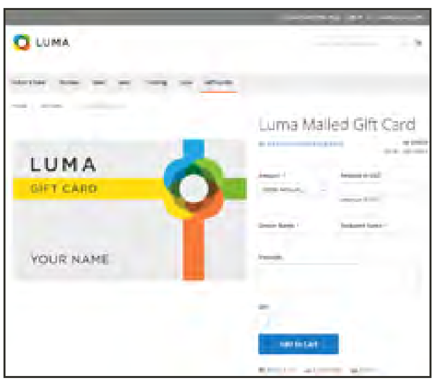


Bundle Product

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

Downloadable Product

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



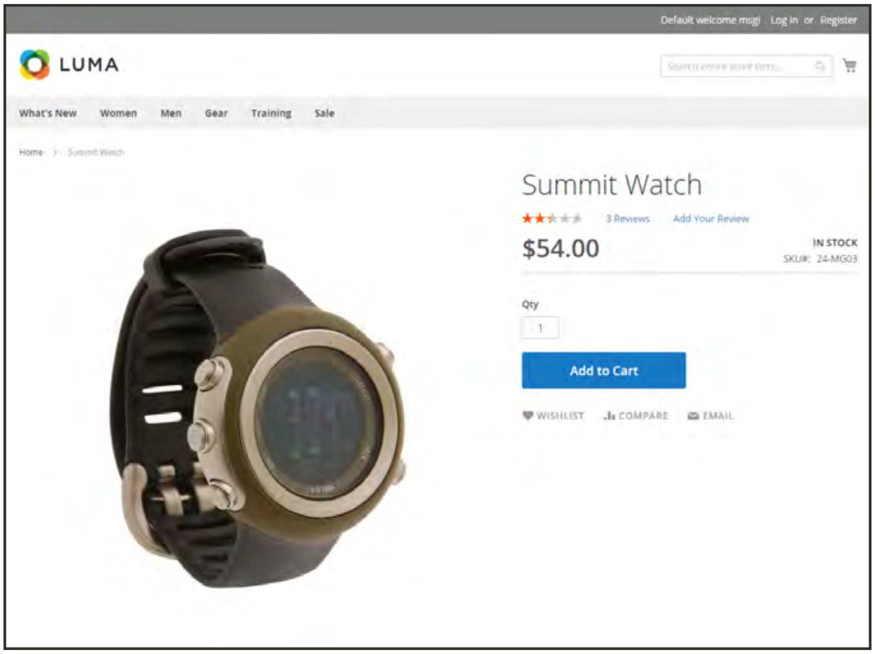
Gift Card

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

Simple Product

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

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



Simple Product

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Required Settings

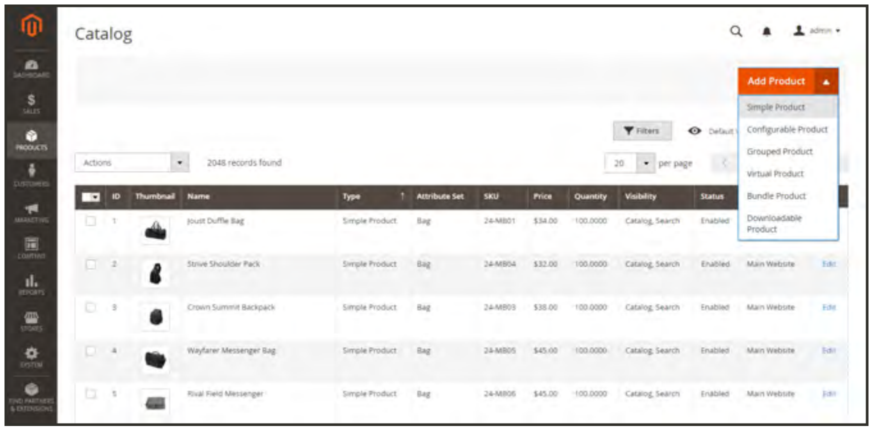
Step 4: Complete the Basic Settings

Step 5: Complete the Product Information

Step 6: Publish the Product

Step 1: Choose the Product Type

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



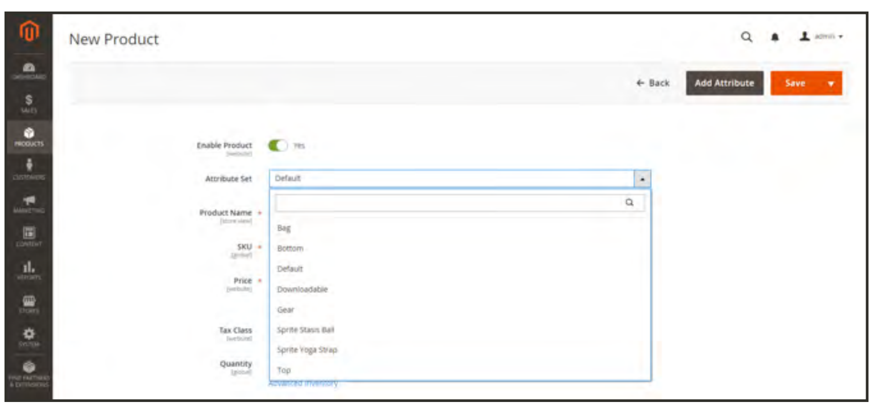
Add Simple Product

Step 2: Choose the Attribute Set

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

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

The form is updated to reflect the change.



Choose Attribute Set

Step 3: Complete the Required Settings

1. Enter the product **Product Name**.
2. Accept the default **SKU** that is based on the product name, or enter another.

3. Enter the product **Price**.

4. Because the product is not yet ready to publish, set the **Enable Product** switch to the "No" position.

5. Tap **Save** and continue.

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

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

Choose Store View

Step 4: Complete the Basic Settings

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

2. Enter the **Quantity** of the product that is currently in stock.

   Take note that by default, **Stock Status** is set to "In Stock."

3. Enter the **Weight** of the product.

4. Accept the default **Visibility** setting, "Catalog, Search."

5. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

Choose an existing category:

a. Start typing in the box to find a match.

b. Mark the checkbox of each category that is to be assigned.

Create a new category:

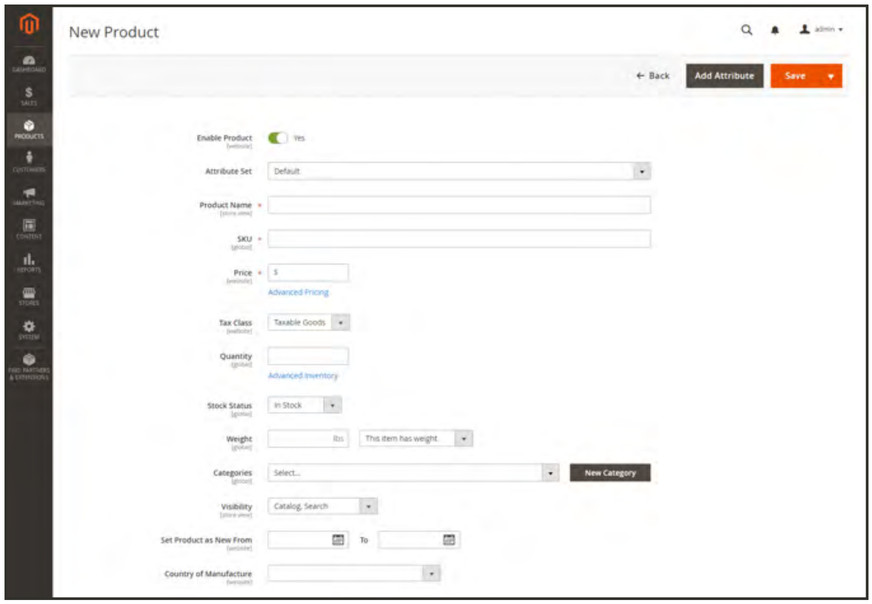
a. Tap **New Category**.

b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.

c. Tap **Create Category**.

6. To feature the product in the list of new products, mark the **Set Product as New** checkbox.

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



Product Details

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

Step 5: Complete the Product Information

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

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

Step 6: Publish the Product

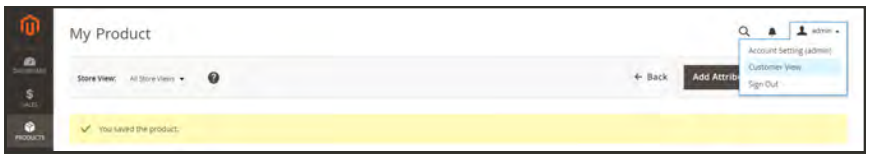
1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the "Yes" position.

2. Do one of the following:

Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.

2. To view the product in your store, choose **Customer View** on the **Admin** (▼) menu. The store opens in a new browser tab.



Customer View

Method 2: Save and Close

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

Save & Close

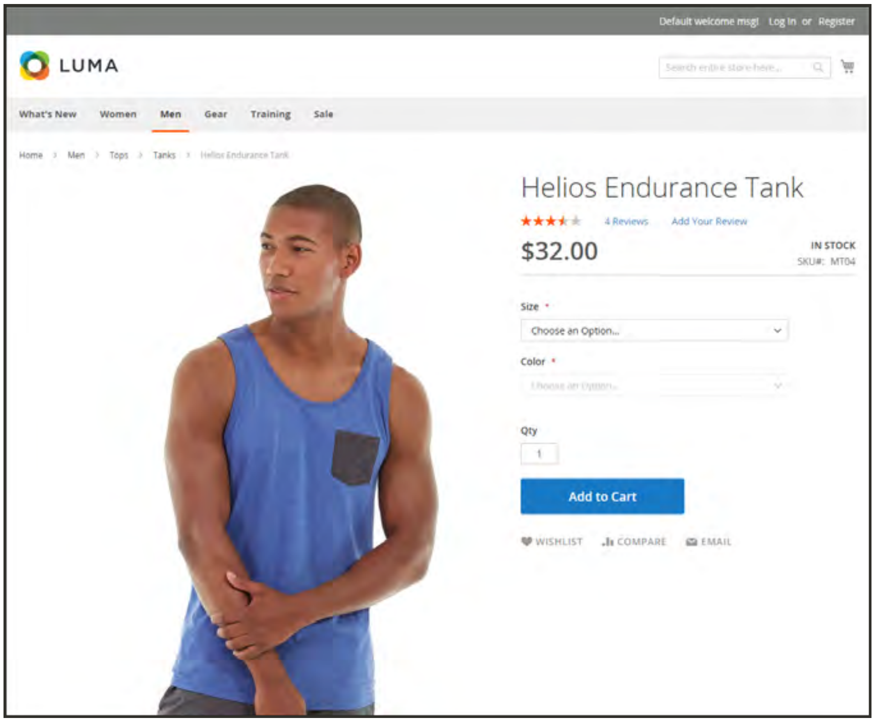
THINGS TO REMEMBER

- Simple products can be included in configurable, bundle, and grouped product types.

- A simple product can have custom options with a variety of input controls, which makes it possible to sell many product variations from a single SKU.

Configurable Product

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



Configurable Product

Part 1: Creating a Configurable Product

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

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

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

Product Variation Attribute Requirements

PROPERTY	SETTING
Scope	Global
Catalog Input Type for Store Owner	The input type of any attribute that is used for a product variation must be one of the following: Dropdown Visual Swatch Text Swatch
Values Required	Yes

Process Overview:

Part I: Create Configurable Product

Step 1: Choose the Product Type

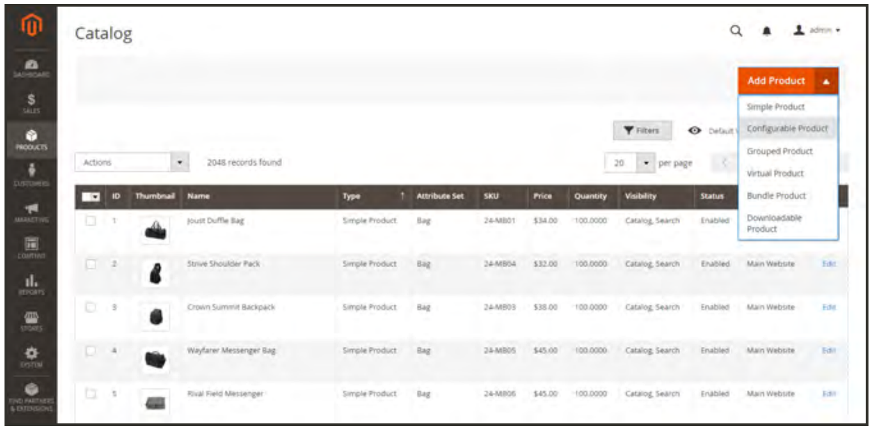
Step 3: Complete the Required Settings

Step 4: Complete the Basic Settings

Step 5: Save and Continue

Step 1: Choose the Product Type

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



Add Configurable Product

Step 2: Choose the Attribute Set

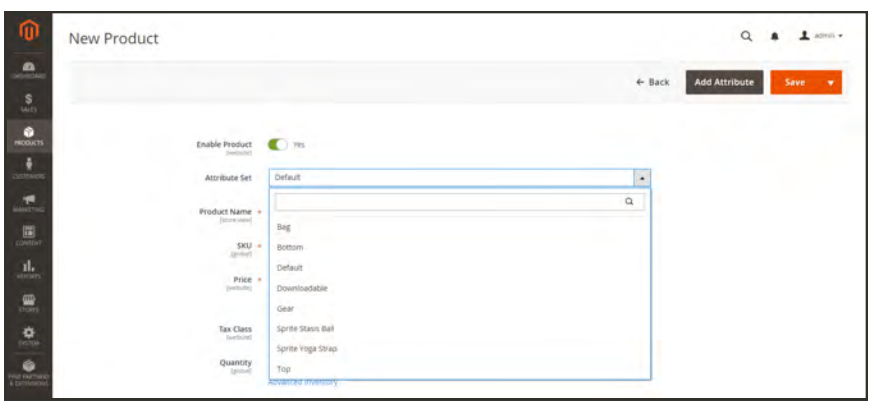
The attribute set determines the selection of fields that are used in the product. The attribute set that is used in the following example has drop-down attributes for color and size. The name of the attribute set is indicated at the top of the page, and is initially set to "Default".

1. To choose the attribute set for the product, click the field at the top of the page and do one of the following:

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

   The form is updated to reflect the change.

2. If you need to add an additional attribute to the attribute set, tap **Add Attribute**. Then, follow the instruction in Adding an Attribute to a Product.



Choose Template

Step 3: Complete the Required Settings

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

   When the product is saved, the Store View chooser appears in the upper-left corner.
6. Choose the **Store View** where the product is to be available.

Choose Store View

Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
   - None
   - Taxable Goods
2. The **Quantity** is determined by the product variations, so you can leave it blank for now.

   The Stock Status of a configurable product is determined by each associated configuration. Because the product was saved without entering a quantity, the Stock Status is now set to “Out of Stock.”

   a. Enter the product **Weight**.

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

Choose an existing category:

a. Start typing in the box to find a match.

b. Mark the checkbox of the category that is to be assigned.

Create a new category:

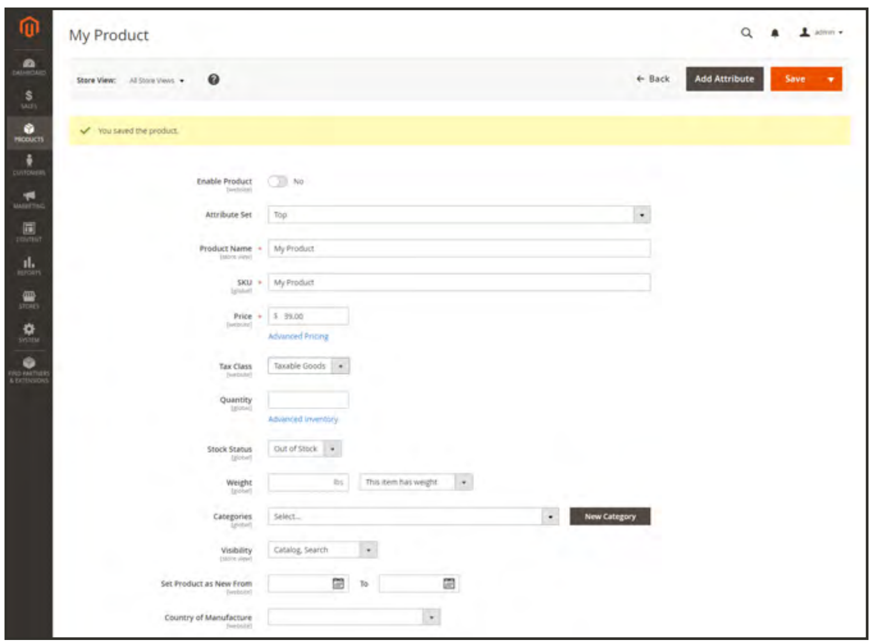
a. Tap **New Category**.

b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.

c. Tap **Create Category**.

5. To feature the product in the list of new products, mark the **Set Product as New** checkbox.

6. Choose the **Country of Manufacture**.



Product Details

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

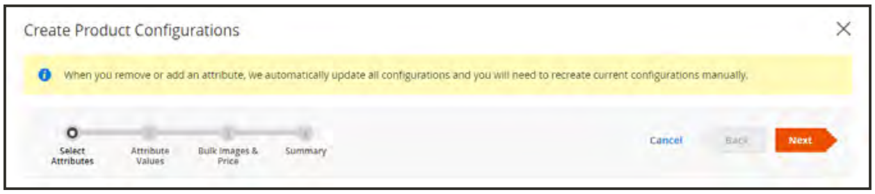
Step 5: Save and Continue

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

Part 2: Adding Configurations

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

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



Progress Bar

Process Overview: Part II: Add Configurations

Step 1: Choose the Attributes

Step 2: Enter the Attribute Values

Step 3: Configure the Images, Price, and Quantity

Step 4: Generate the Product Configurations

Step 5: Add a Product Image

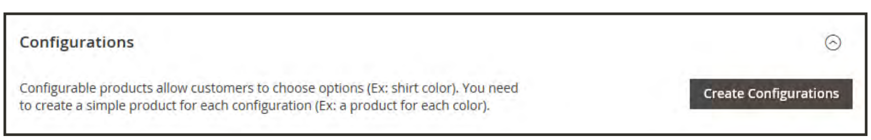
Step 6: Complete the Product Information

Step 7: Publish the Product

Step 8: Configure the Cart Thumbnails (Optional)

Step 1: Choose the Attributes

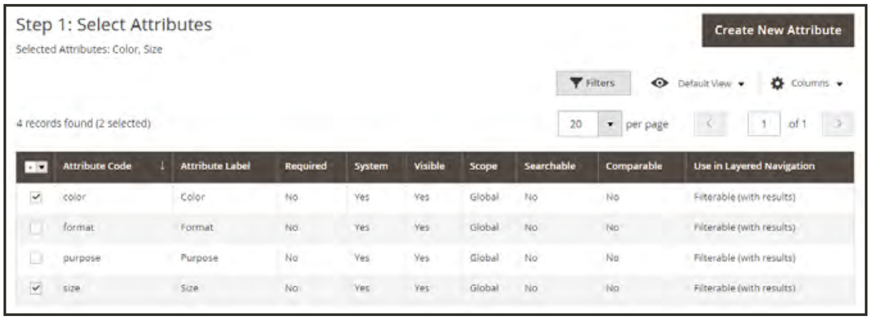
1. Continuing from Part I, scroll down to the **Configurations** section. Then, tap **Create Configurations**.



Configurations

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

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



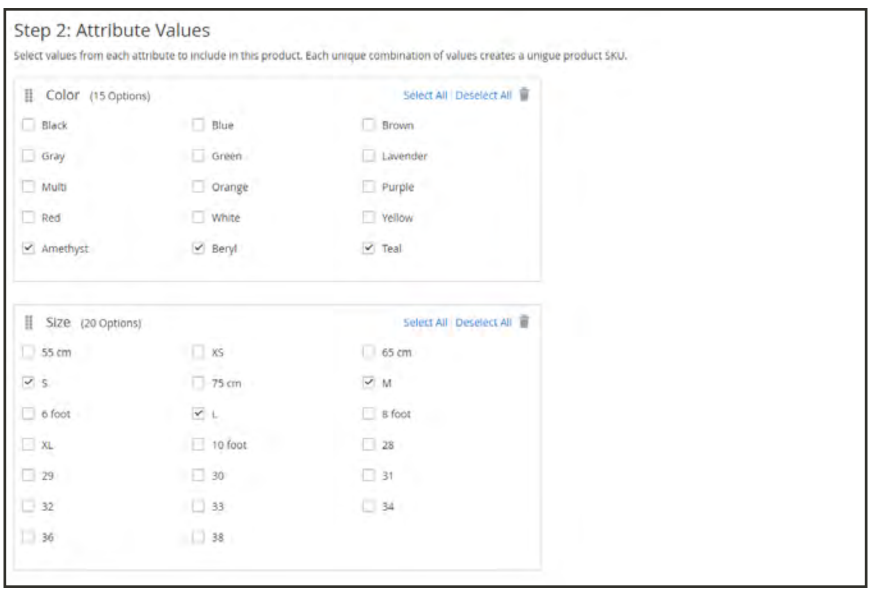
Select Attributes

4. If you need to add a new attribute, **Create New Attribute**. Complete the attribute properties, and tap **Save Attribute**. Then, mark the checkbox to select the attribute.

5. In the upper-right corner, tap **Next**.

Step 2: Enter the Attribute Values

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



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

3. In the progress bar, **Next**.

Step 3: Configure the Images, Price, and Quantity

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

1. Choose the configuration options that apply.

Configure the Images

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

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

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

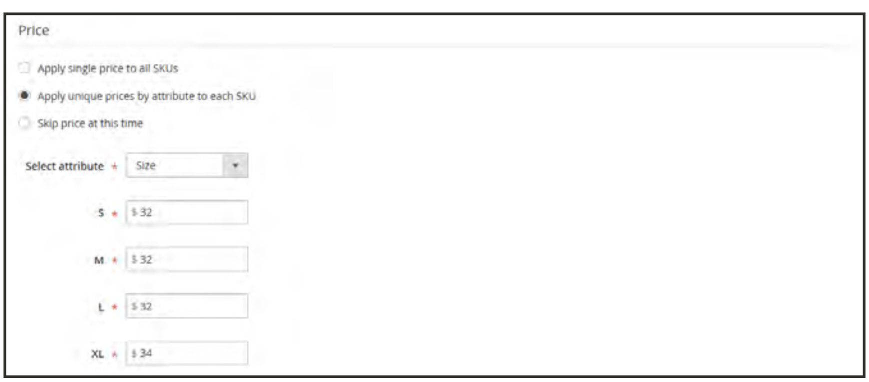
Method 1: Apply the Same Price to All SKUs

1. If the price is the same for all variations, 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

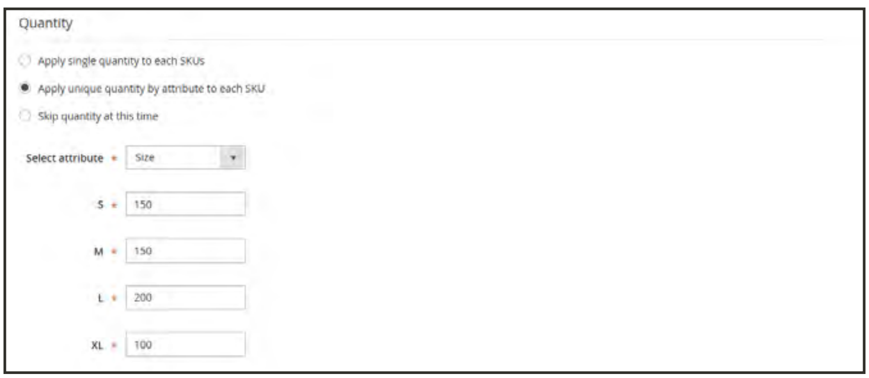
Method 1: Apply the Same Quantity to All SKUs

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.

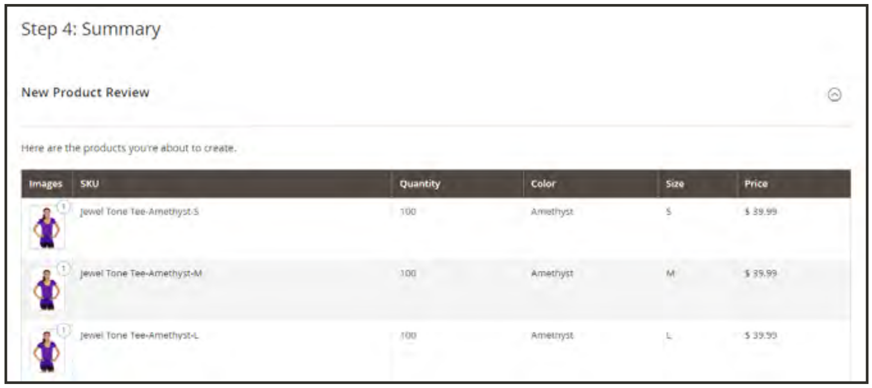


Different Quantities per Attribute

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

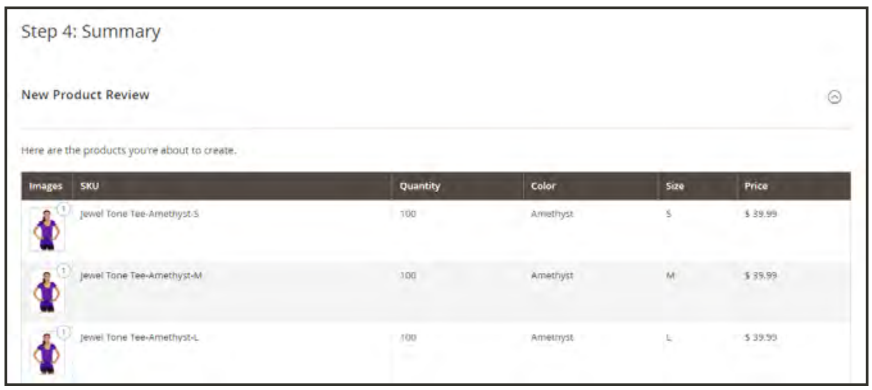
Step 4: Generate the Product Configurations

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



Summary

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



Current Configurations

Step 5: Add a Product Image

1. Scroll down to the **Images and Videos** section. Then, expand the section.

2. Click the **Camera** tile, and browse to the main image that you want to use for the configurable product.

   To learn more, see: Images and Videos.

Step 6: Complete the Product Information

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

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

- Products in Websites
- Design
- Gift Options

Step 7: Publish the Product

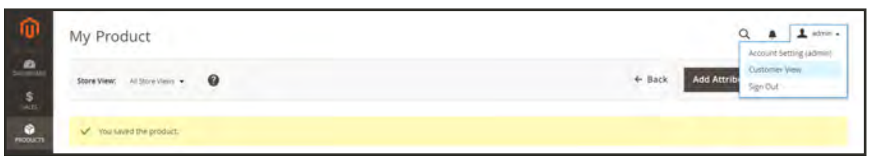
1. If you are ready to publish the product in the catalog, set **Enable Product** to the "Yes" ( ) position.

2. Do one of the following:

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

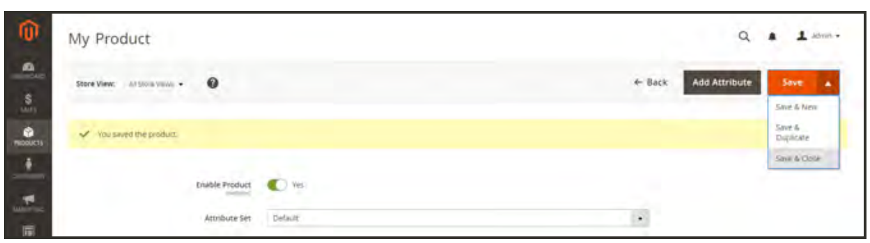
1. In the upper-right corner, tap **Save**.

2. To view the product in your store, choose **Customer View** on the **Admin** ( ) menu. The store opens in a new browser tab.



Customer View

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



Save & Close

Step 8: Configure the Cart Thumbnails (Optional)

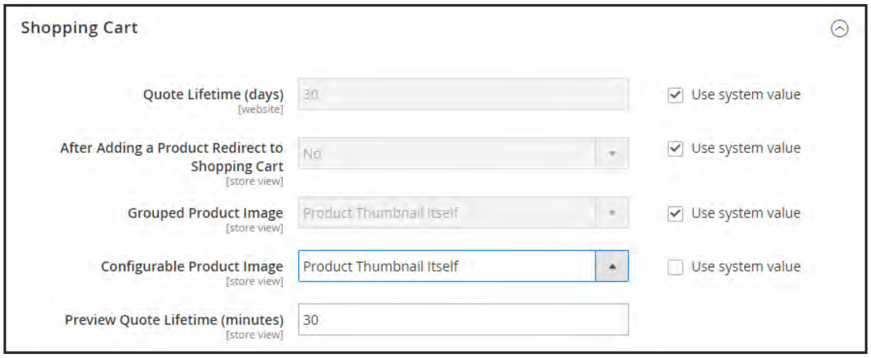
If you have a different image for each variation you can set the configuration to use the correct image for the shopping cart thumbnail.

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

2. In the panel on the left under Sales, choose **Checkout**. Then, expand the **Shopping Cart** section.

3. Set **Configurable Product Image** to "Product Thumbnail Itself."

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



Shopping Cart - Configurable Product Image

THINGS TO REMEMBER

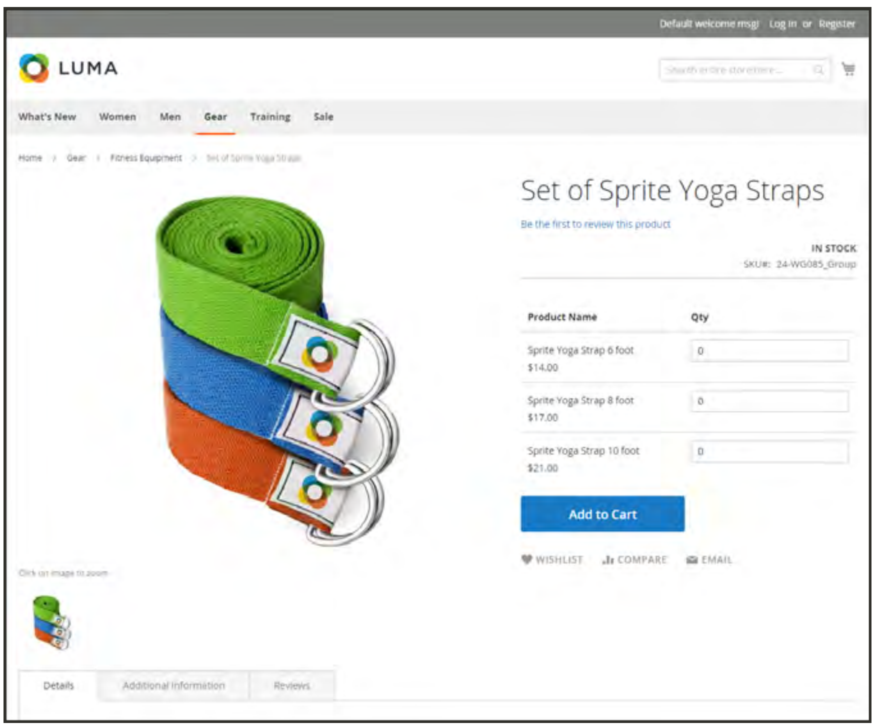
- A configurable product allows the shopper to choose options from drop-down, multiple select, visual swatch and text swatch input types. Each option is actually a separate, simple product.
- The attributes that are used for product variations must have a global scope and the customer must be required to choose a value. The product variation attributes must be included in the attribute set that is used as a template for the configurable product.
- The attribute set that is used as a template for a configurable product must include the attribute(s) that contain the values that are needed for each product variation.
- The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the product variation.

Grouped Product

A grouped product consists of simple standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme. Presenting a grouped product can create an incentive for customers to purchase additional items. A grouped product provides an easy way to offer variations of a product, and list them all on the same page.

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

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

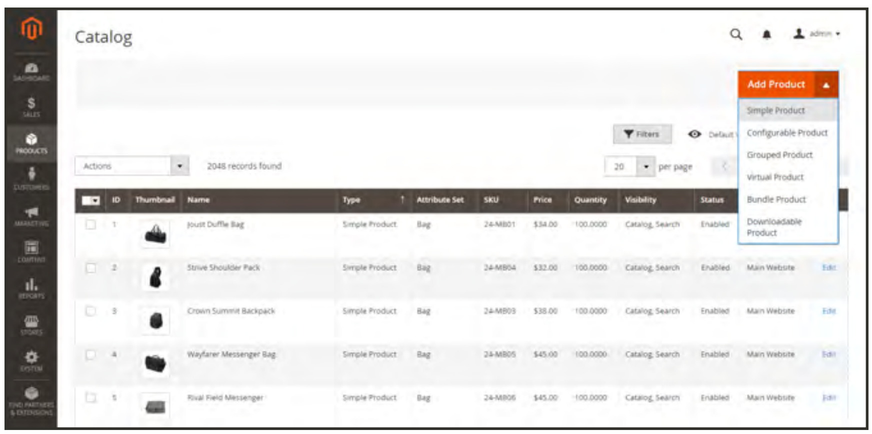


Grouped Product

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

Step 1: Choose the Product Type

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



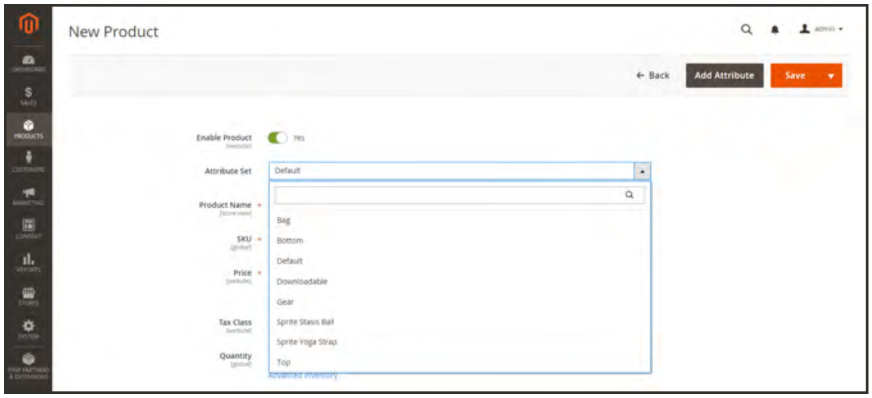
Add Simple Product

Step 2: Choose the Attribute Set

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

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

The form is updated to reflect the change.



Choose Template

Step 3: Complete the Required Settings

1. Enter the product **Product Name**.

2. Accept the default **SKU** that is based on the product name, or enter another.

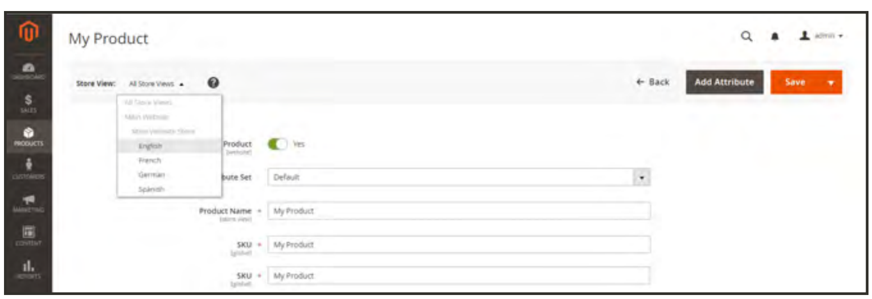
   Take note that the **Quantity** field is not available because the value is derived from the individual products that make up the group.

3. Because the product is not yet ready to publish, set the **Enable Product** switch to the "No" ( ) position.

4. Tap **Save** and continue.

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

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



Choose Store View

Step 4: Complete the Basic Settings

1. Accept the **Stock Status** setting, "In Stock."

2. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

Choose an existing category:

a. Start typing in the box to find a match.

b. Mark the checkbox of the category that is to be assigned.

Create a new category:

a. Tap **New Category**.

b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.

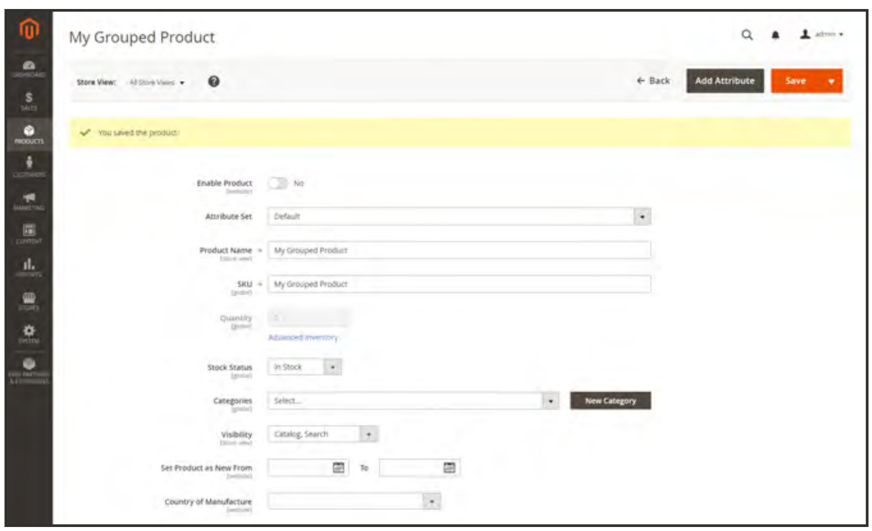
c. Tap **Create Category**.

3. Accept the **Visibility** settings, “Catalog, Search.”

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

5. Choose the **Country of Manufacture**.

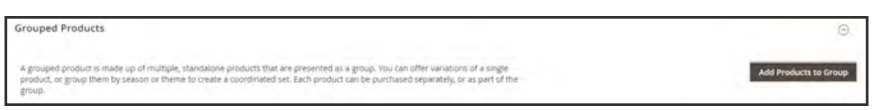
   There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.



Grouped Product Details

Step 5: Add Products to the Group

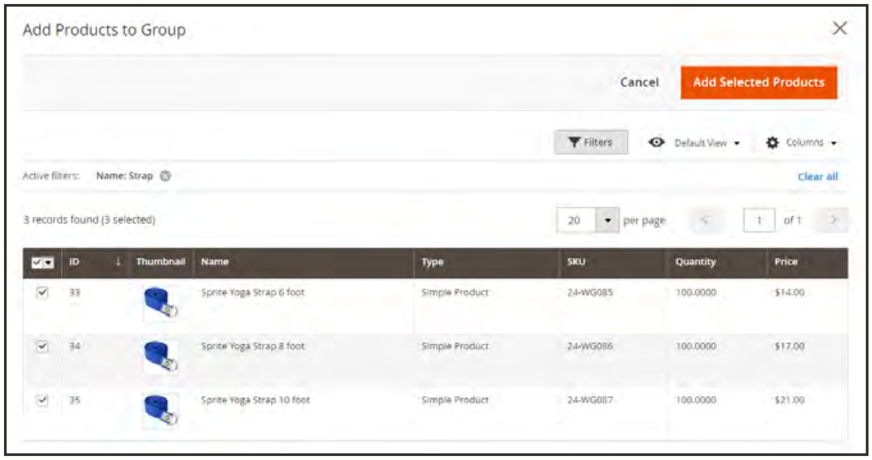
1. Scroll down to the **Grouped Products** section. Then, tap **Add Products to Group**.



Grouped Products

2. If necessary, use the filters to find the products that you want to include in the group.

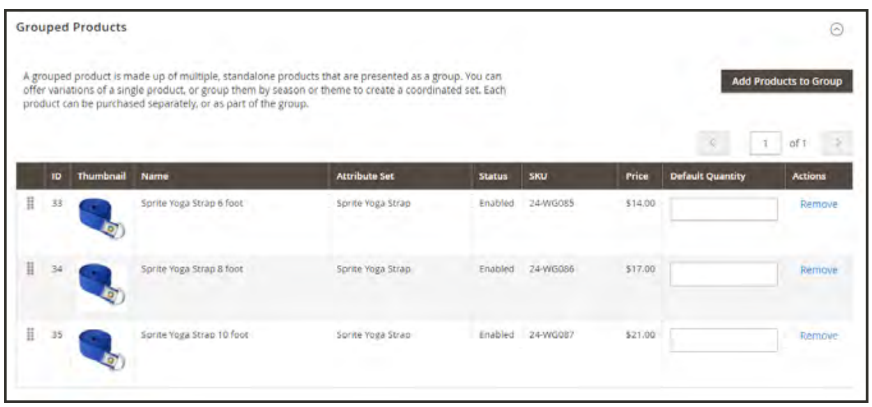
3. In the list, mark the checkbox of each item that you want to include in the group.



Add Selected Products

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

   The selected products appear in the Grouped Products section.



Products in Group

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

Step 5: Complete the Product Information

Complete the information in the following sections as needed:

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

Step 6: Publish the Product

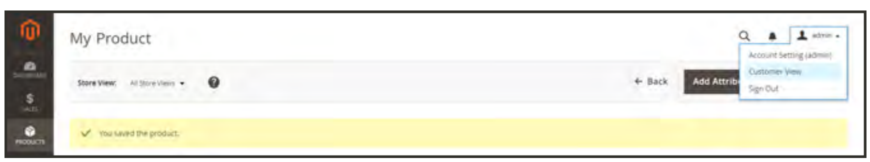
1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the "Yes" ( ) position.

2. Do one of the following:

Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.

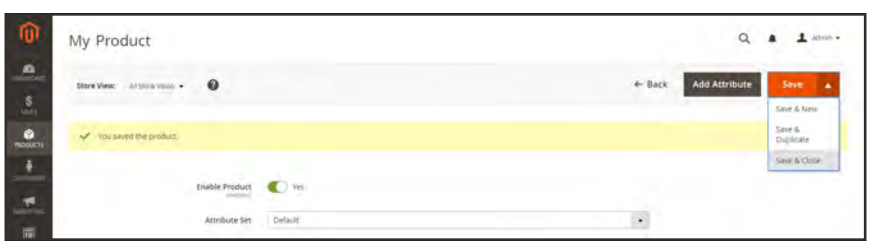
2. To view the product in your store, choose **Customer View** on the **Admin** (▼) menu. The store opens in a new browser tab.



Customer View

Method 2: Save and Close

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

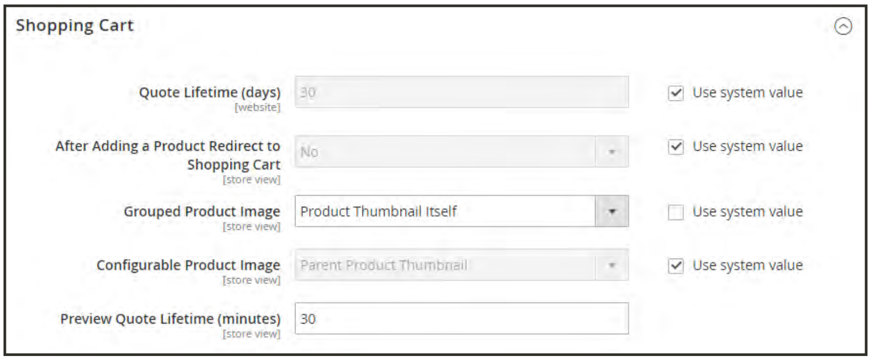


Save & Close

Step 7: Configure the Cart Thumbnails (Optional)

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

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



Shopping Cart

THINGS TO REMEMBER

- A grouped product is essentially a collection of simple associated products.
- Each item purchased appears individually in the shopping cart, rather than as part of the group.
- The thumbnail image in the shopping cart can be set to display the image from the grouped parent product, or associated product.

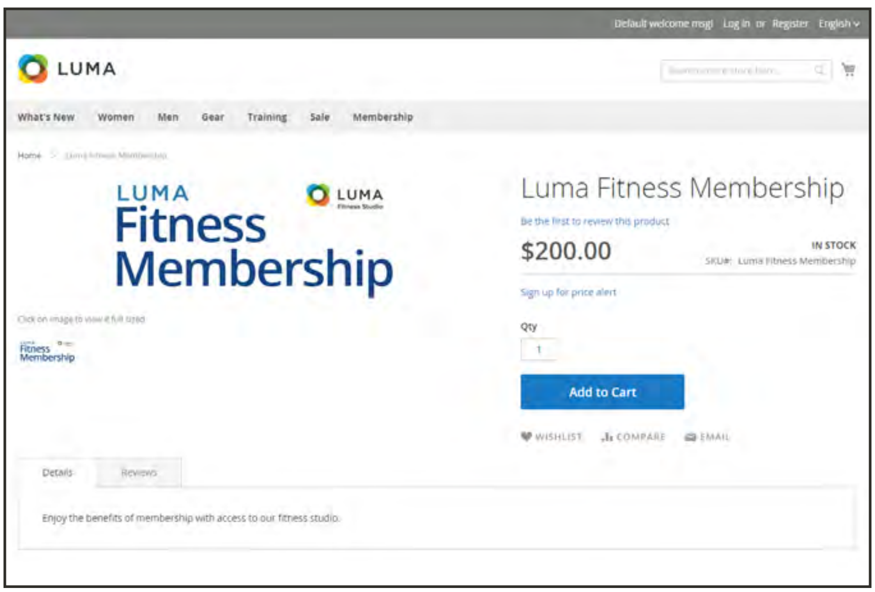
Virtual Product

Virtual products — or digital goods — represent non-tangible items such as memberships, services, warranties, or subscriptions and digital downloads of books, music, videos, or other products. Virtual products can be sold individually, or included as part of the following product types:

- Grouped Product
- Bundle Product

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

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



Virtual Product

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Required Settings

Step 4: Complete the Basic Settings

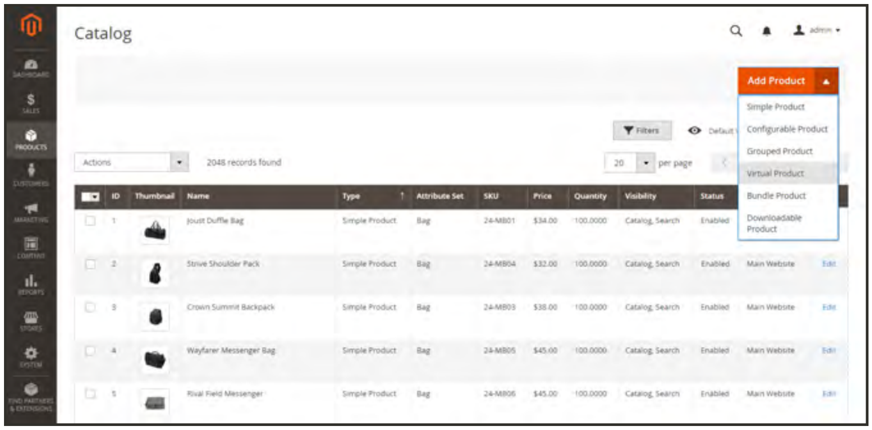
Step 5: Complete the Product Information

Step 6: Publish the Product

Step 1: Choose the Product Type

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

2. In the upper-right corner on the **Add Product** (▾) menu, choose **Virtual Product**.



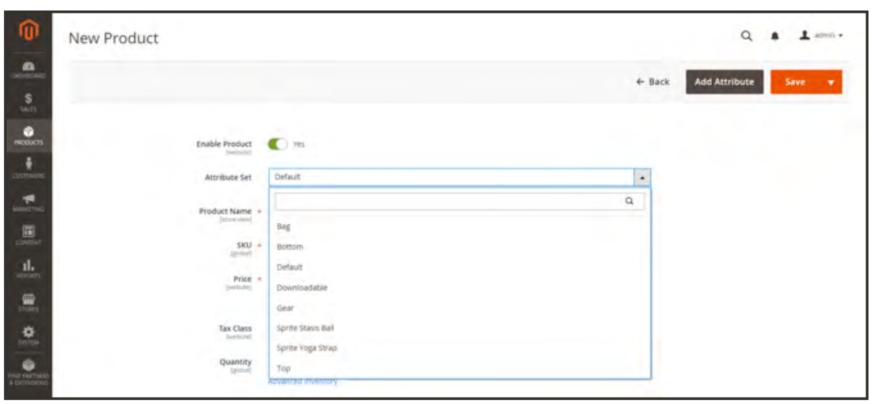
Add Virtual Product

Step 2: Choose the Attribute Set

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

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

The form is updated to reflect the change.



Choose Attribute Set

Step 3: Complete the Required Settings

1. Enter the product **Product Name**.

2. Accept the default **SKU** that is based on the product name, or enter another.

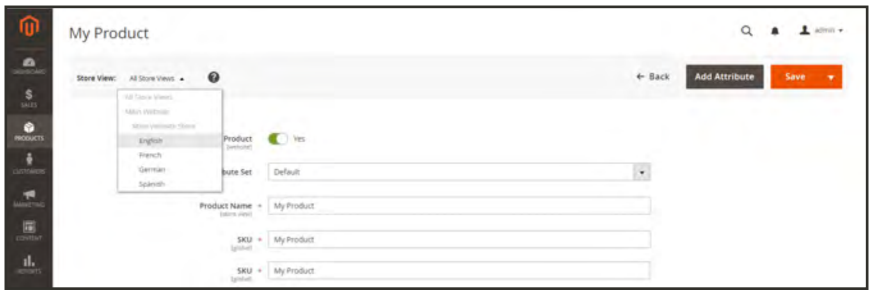
3. Enter the product **Price**.

4. Because the product is not yet ready to publish, set the **Enable Product** switch to the “No” ( ) position.

5. Tap **Save** and continue.

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

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



Choose Store View

Step 4: Complete the Basic Settings

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

2. Enter the **Quantity** of the product that is currently in stock. Then, do the following:

   a. Accept the default **Stock Status** setting, “In Stock.”

   Note that the **Weight** field is not used, because a virtual product is not shipped.

   b. Accept the default **Visibility** setting, “Catalog, Search.”

3. To assign **Categories** to the product, tap the **Select…** box. Then, do either of the following:

Choose an existing category:

a. Start typing in the box to find a match.

b. Mark the checkbox of the category that is to be assigned.

Create a new category:

a. Tap **New Category**.

b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.

c. Tap **Create Category**.

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

Step 5: Complete the Product Information

Complete the information in the following sections as needed:

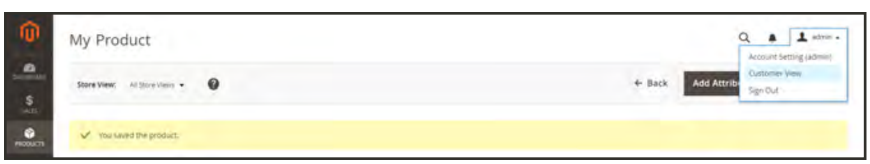
- Content
- Images and Videos
- Search Engine Optimization
- Related Products, Up-Sells, and Cross-Sells
- Customizable Options
- Products in Websites
- Design
- Gift Options

Step 6: Publish the Product

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

Method 1: Save and Preview

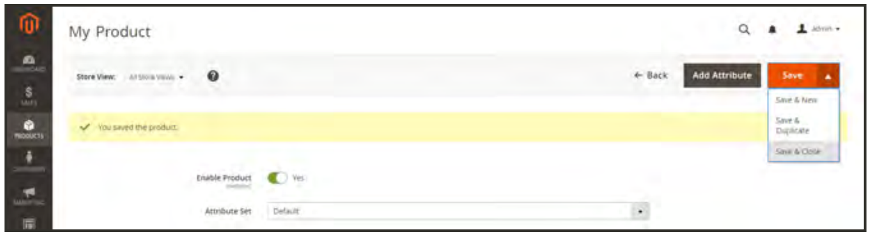
1. In the upper-right corner, tap **Save**.
2. To view the product in your store, choose **Customer View** on the **Admin** (▼) menu. The store opens in a new browser tab.



Customer View

Method 2: Save and Close

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



Save & Close

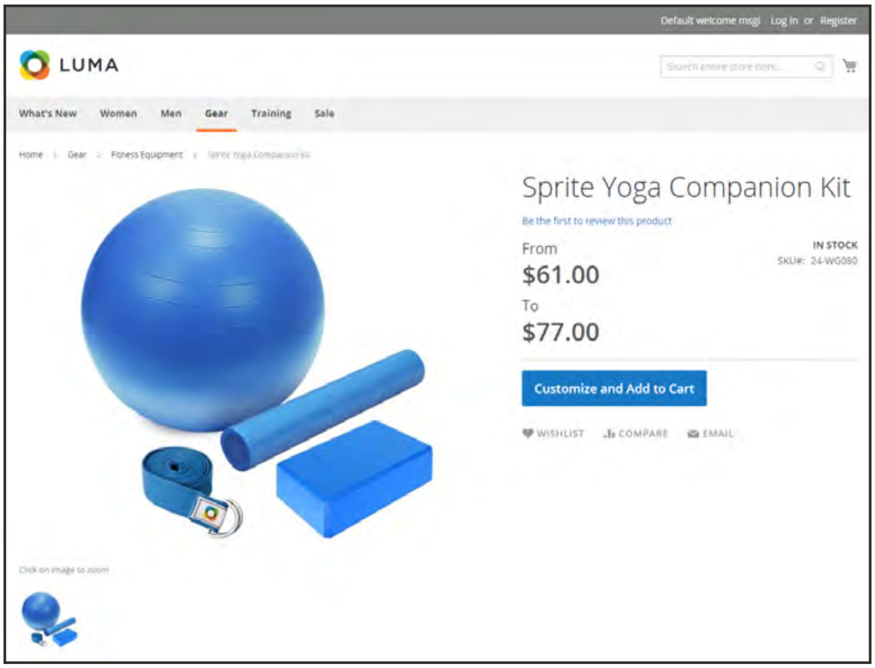
THINGS TO REMEMBER

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

Bundle Product

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

- Simple Product
- Virtual Product



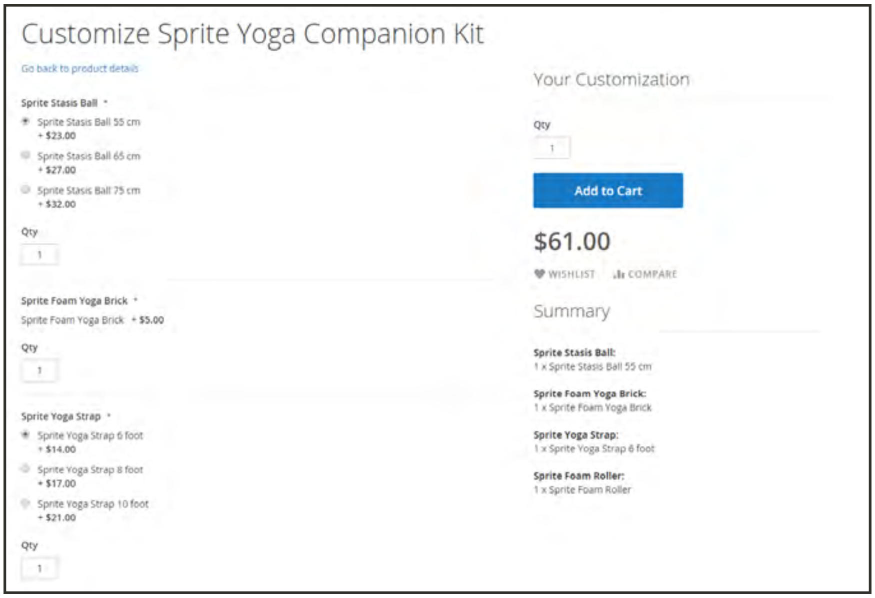
Bundle Product

Customizing the Bundle

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

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

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



Customize Bundle

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

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Required Settings

Step 4: Complete the Basic Settings

Step 5: Add the Bundle Items

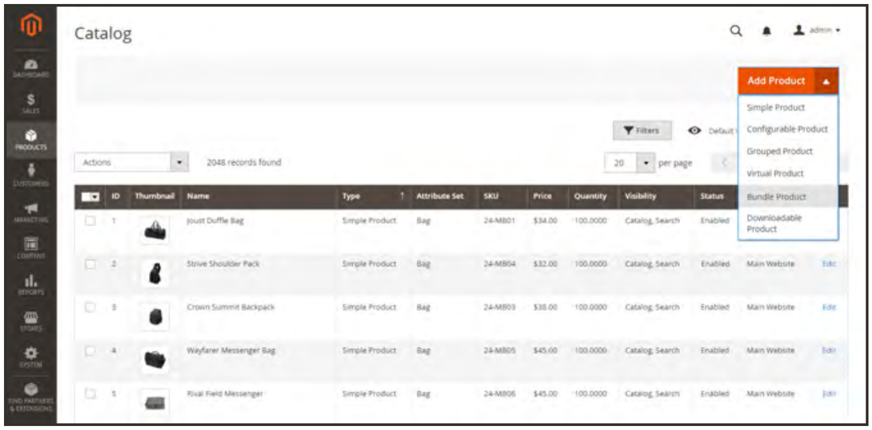
Step 6: Complete the Product Information

Step 7: Publish the Product

Step 1: Choose the Product Type

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

2. In the upper-right corner on the **Add Product** ( ) menu, choose **Bundle Product**.



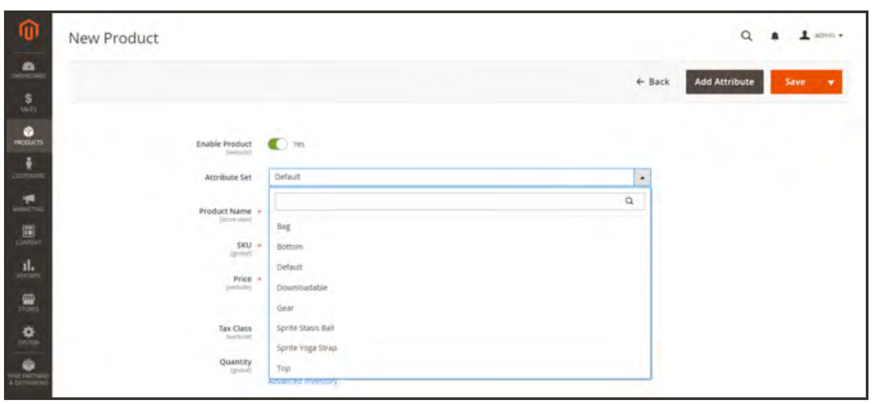
Add Bundle Product

Step 2: Choose the Attribute Set

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

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

The form is updated to reflect the change.



Choose Template

Step 3: Complete the Required Settings

1. Enter the product **Product Name**.

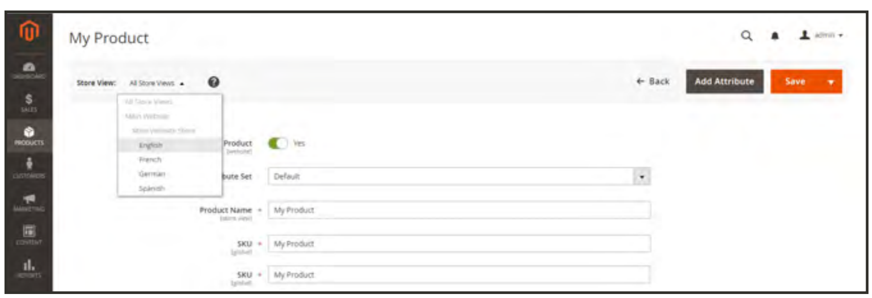
2. You can either accept the default **SKU** that is based on the product name, or enter a different value. To determine the type of SKU that is assigned to each bundle item, do the following:

- A **Dynamic SKU** can be assigned automatically to each bundle item by adding a suffix to the default SKU. By default, Dynamic SKU is set to "Yes."
- If you prefer to assign a unique SKU for each bundle item, set **Dynamic SKU** to the "No" ( ) position.

Dynamic SKU and Price

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

   When the product is saved, the Store View chooser appears in the upper-left corner.
6. Choose the **Store View** where the product is to be available.



Choose Store View

Step 4: Complete the Basic Settings

1. If the bundle has Fixed Pricing, set **Tax Class** to one of the following:
   - None
   - Taxable Goods

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

2. Take note of the following:
    - The **Quantity** is not available because the value is determined for each bundle item.
    - The **Stock Status** is set by default to "In Stock."
3. To determine the weight of the bundle, do one of the following:
    - A **Dynamic Weight** changes to reflect the options chosen by the customer. By default, Dynamic Weight is set to "Yes," and the Weight field is left blank.
    - To assign a fixed weight to the bundle, set **Dynamic Weight** to the "No." ( ) position. Then, enter the **Weight** of the bundle.

Dynamic Weight

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

Choose an existing category:

a. Start typing in the box to find a match.

b. Mark the checkbox of each category that is to be assigned.

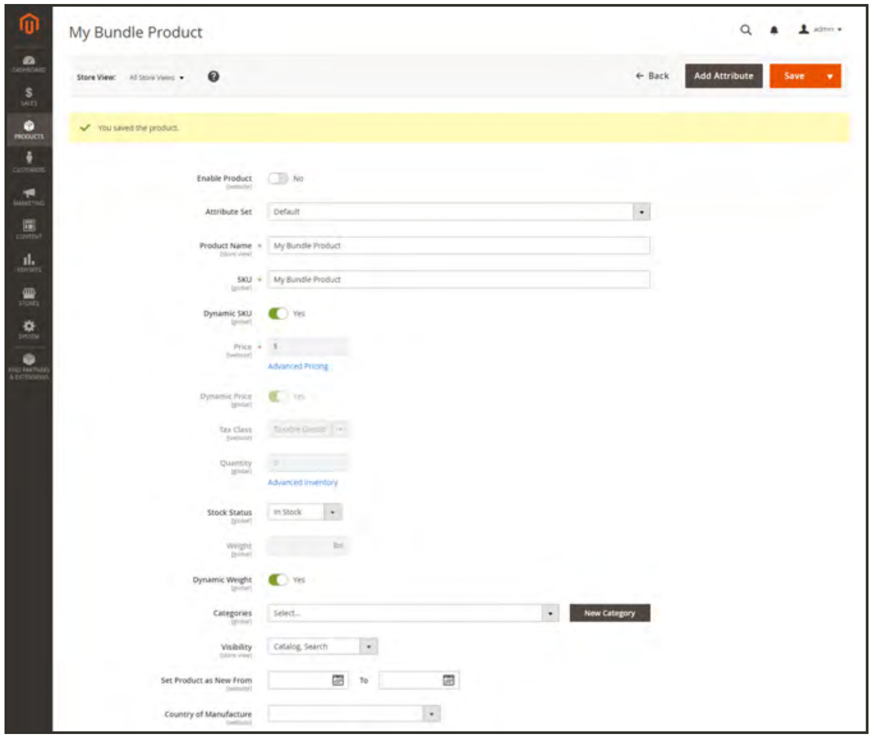
Create a new category:

a. Tap **New Category**.

b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.

c. Tap **Create Category**.

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



Bundle Details

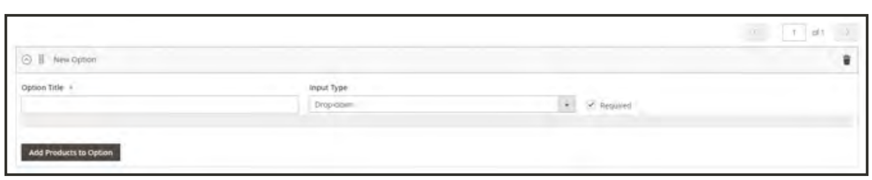
There might be additional attributes that describe the product. The selection varies attribute set, and you can complete them later.

Step 5: Add the Bundle Items

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

Bundle Items

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



Add Bundle Options

a. Enter an **Option Title** to be used field label.

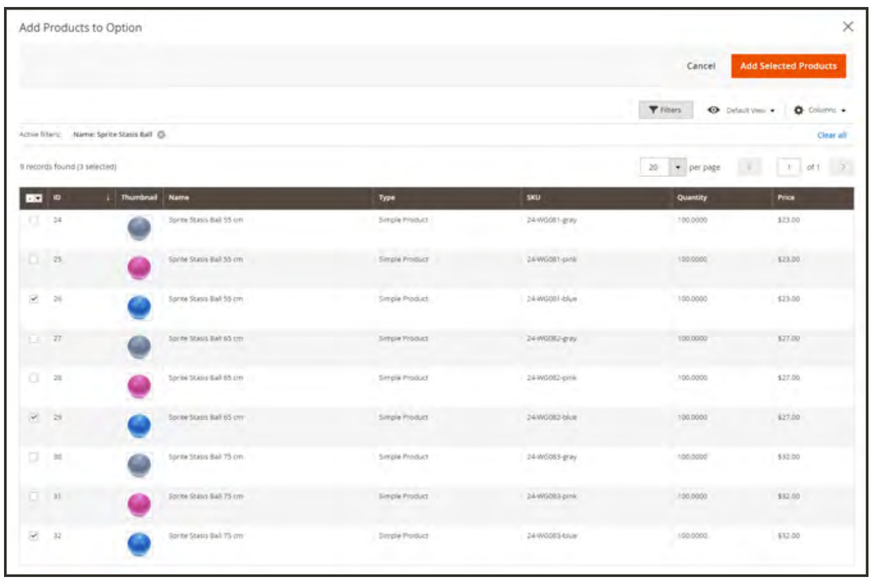
b. Set **Input Type** to one of the following:

- Drop-down
- Radio buttons
- Checkbox (See Note.)
- Multiple Select (See Note.)

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

d. Tap **Add Products to Option**. Then, mark the checkbox of each product that you want to include in this option. If there are many products, use the list filters and pagination controls to find the products you need.

e. Tap **Add Selected Products**.



Add Selected Products

f. After the items appear in the Options section choose one to be the **Default** selection.

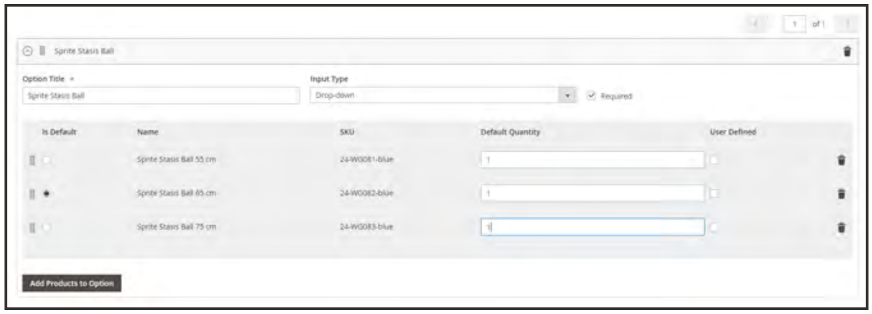
g. In the **Default Quantity** column, enter the quantity of each item that is to be added to the bundle when a customer chooses the item.

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

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

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

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



Item Detail

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. When complete, tap **Save**.

Step 6: Complete the Product Information

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

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

Step 7: Publish the Product

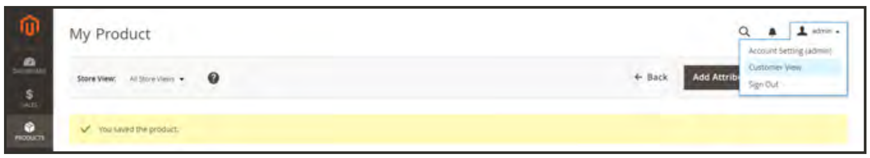
1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the "Yes" ( ) position.

2. Do one of the following:

Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.

2. To view the product in your store, choose **Customer View** on the **Admin** ( ) menu. The store opens in a new browser tab.



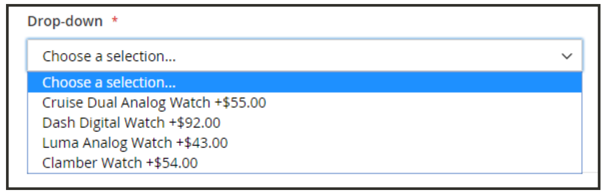
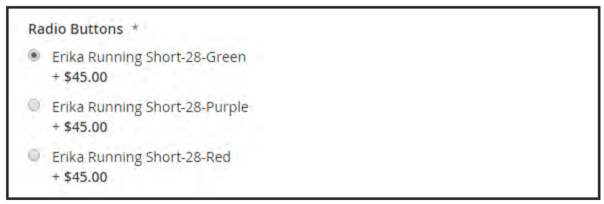
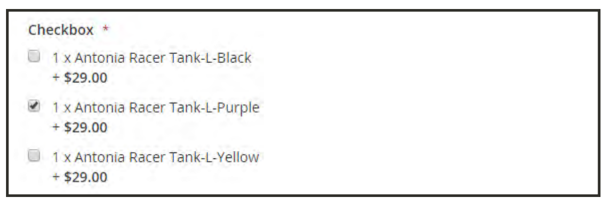
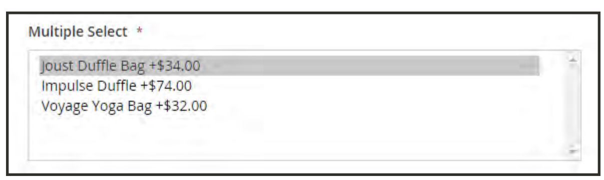
Customer View

Method 2: Save and Close

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

Save & Close

Input Controls

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

</td></tr>
<tr><td>Radio Buttons</td><td>Displays a radio button for each option, followed by the product name and price. Only one item can be selected.

</td></tr>
<tr><td>Checkbox</td><td>Displays a checkbox for each option, followed by the product name and price. Multiple items can be selected.

</td></tr>
<tr><td>Multiple Select</td><td>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.

</td></tr>
</table>

Field Descriptions

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

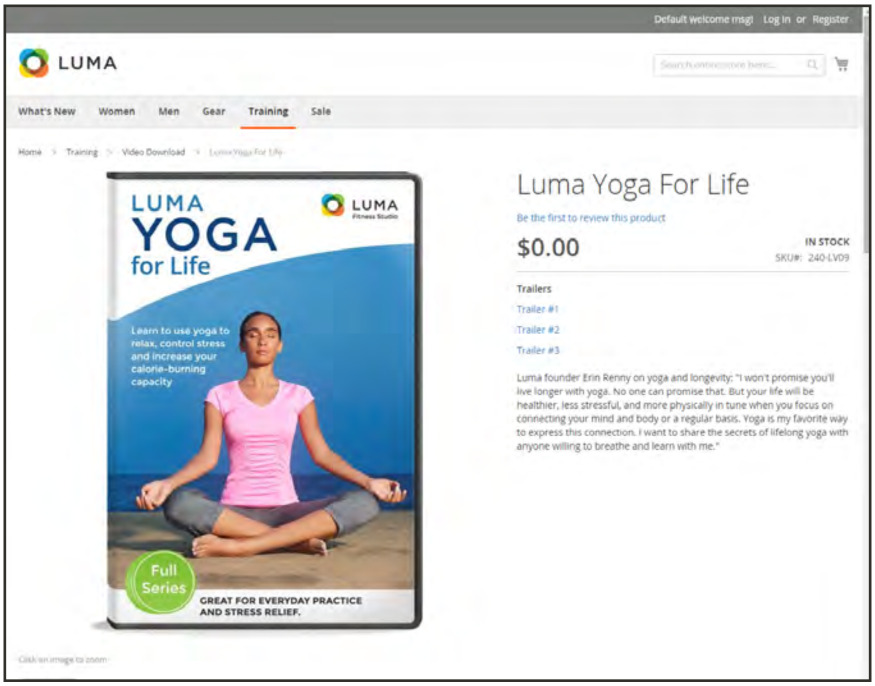
THINGS TO REMEMBER

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

Downloadable Product

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

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



Downloadable Product

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

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

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

Process Overview:

Step 1: Choose the Product Type

Step 2: Choose the Attribute Set

Step 3: Complete the Required Settings

Step 4: Complete the Basic Settings

Step 5: Complete the Downloadable Information

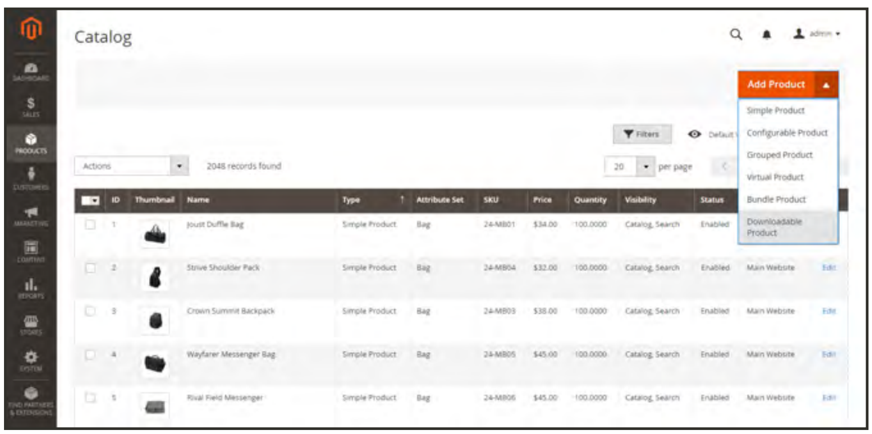
Step 6: Complete the Product Information

Step 7: Publish the Product

Step 1: Choose the Product Type

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

2. In the upper-right corner on the **Add Product** ( ) menu, choose **Downloadable Product**.



Add Downloadable Product

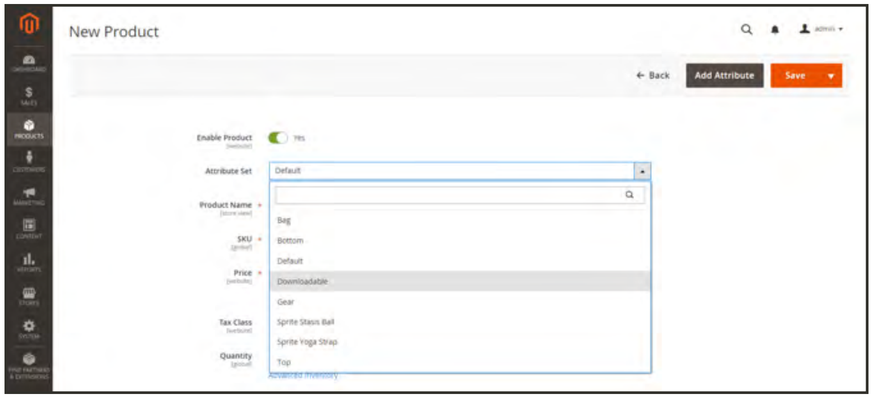
Step 2: Choose the Attribute Set

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

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

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

The form is updated to reflect the change.



Choose Attribute Set

Step 3: Complete the Required Settings

1. Enter the product **Product Name**.

2. Accept the default **SKU** that is based on the product name, or enter another.

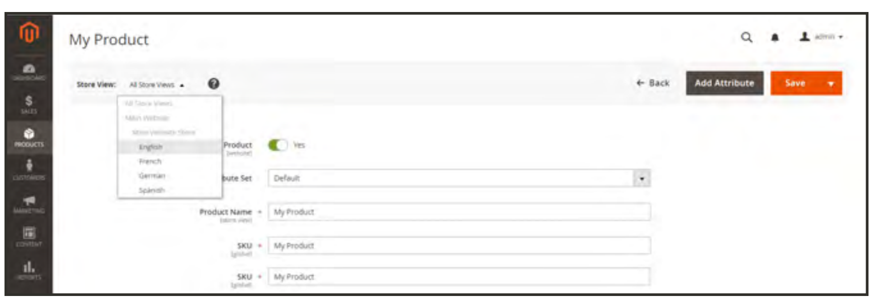
3. Enter the product **Price**.

4. Because the product is not yet ready to publish, set the **Enable Product** switch to the "No" ( ) position.

5. Tap **Save** and continue.

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

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



Choose Store View

Step 4: Complete the Basic Settings

1. Set **Tax Class** to one of the following:
   - None
   - Taxable Goods
2. Enter the **Quantity** of the product that is currently in stock.

   Take note of the following:
   - By default, **Stock Status** is set to "Out of Stock."
   - The **Weight** field is not used, because downloadble products are not shipped.
3. Accept the default **Visibility** setting, "Catalog, Search."
4. To feature the product in the list of new products, mark the **Set Product as New** checkbox.
5. To assign **Categories** to the product, tap the **Select...** box. Then, do either of the following:

   #### Choose an existing category:

   a. Start typing in the box to find a match.

   b. Mark the checkbox of each category that is to be assigned.

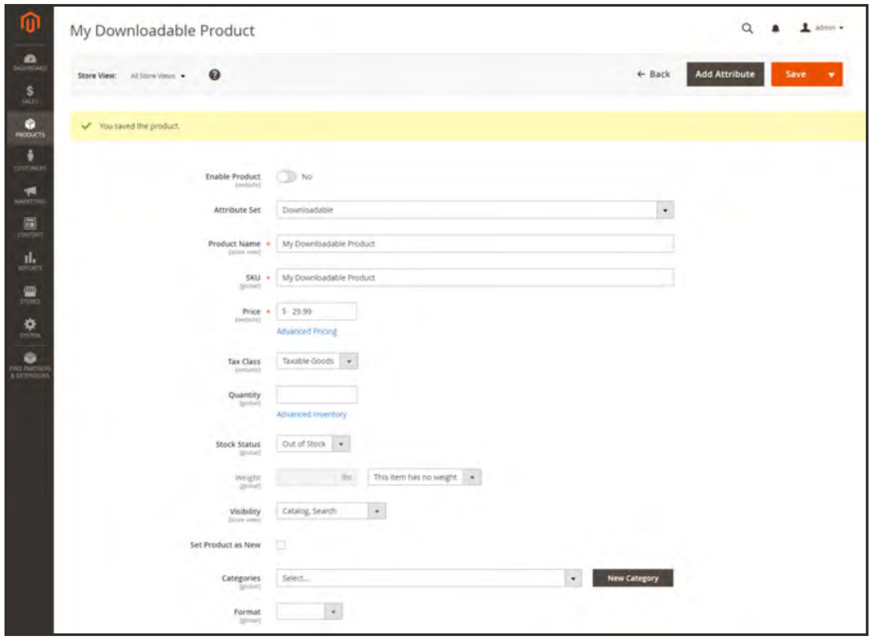
   #### Create a new category:

   a. Tap **New Category**.

   b. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure.

   c. Tap **Create Category**.
6. Set **Format** to one of the following:
   - Download
   - DVD

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



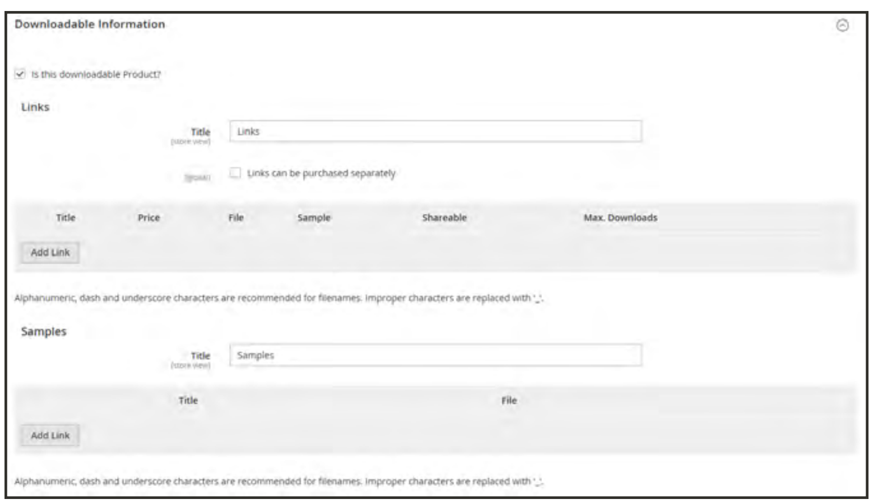
Product Details

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

Step 5: Complete the Downloadable Information

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

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



Downloadable Information

Part 1: Complete the Links

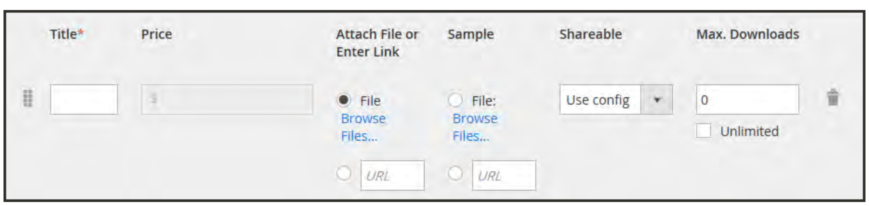
1. In the Links section, enter the **Title** that you want to use as a heading for the download links.
2. If applicable, mark the **Links can be purchased separately** checkbox.
3. Tap **Add Link**. Then, do the following:
   a. Enter the **Title** and **Price** of the download.
   b. For both **File**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

Upload File	To upload the the distribution file to the server, choose "Upload File." Then, browse to the file, and select it for upload.
URL	To access the distribution file from a URL, choose "URL" Then, enter the full URL to the download file.

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

No	Requires customers to log in to their accounts to access the download link.
Yes	Sends the link by email, which customers can share with others.
Use Config	Uses the method that is specified in the Dowloadable Product Options configuration.

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

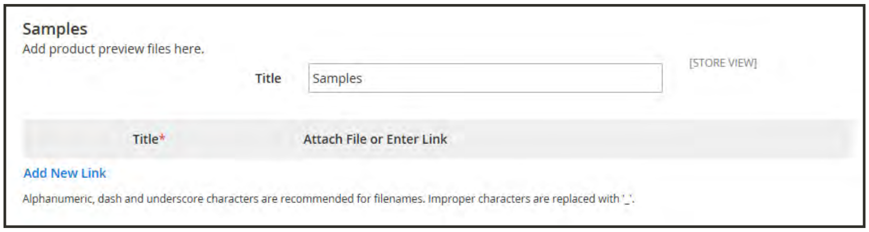


Link Detail

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

Part 2: Complete the Samples

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



Samples

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

Upload File	To upload the the sample distribution file to the server, choose "Upload File." Then, browse to the file, and select it for upload.
URL	To access the sample distribution file from a URL, choose "URL" Then, enter the full URL to the download file.

   c. To add another sample, tap **Add Link**, and repeat these steps.
   d. To change the order of the samples, grab the **Change Order** ( ) icon, and drag the sample to a new position.

Step 6: Complete the Product Information

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

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

Step 7: Publish the Product

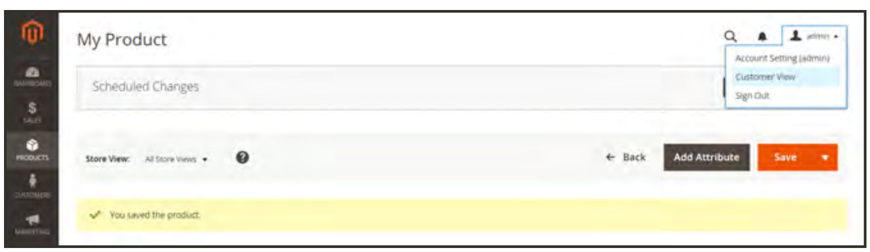
1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the "Yes" ( ) position.

2. Do one of the following:

Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.

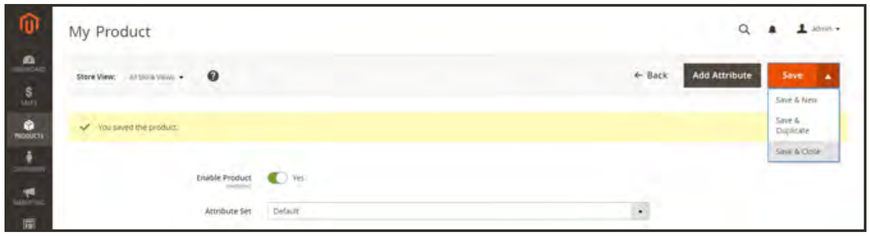
2. To view the product in your store, choose **Customer View** on the **Admin** ( ) menu. The store opens in a new browser tab.



Customer View

Method 2: Save and Close

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



Save & Close

THINGS TO REMEMBER

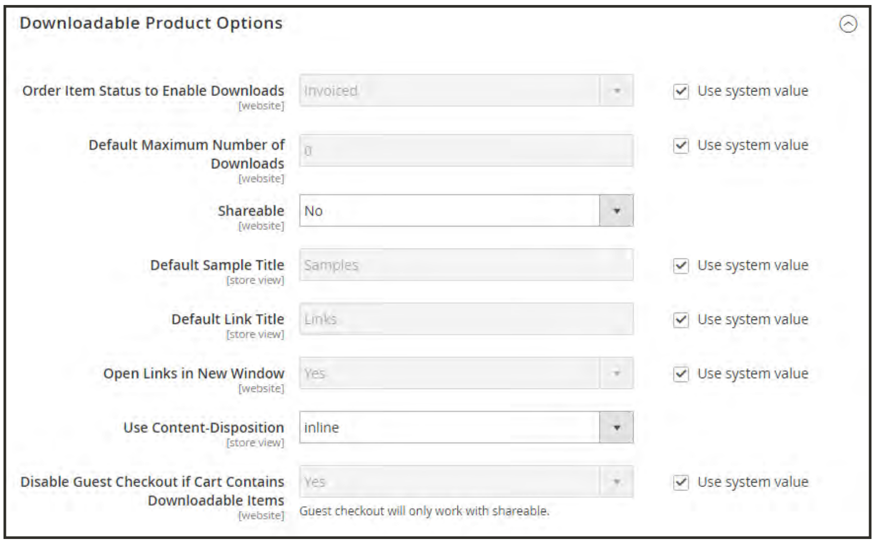
- Downloadable products can be uploaded to the server, or linked to from another server on the Internet.
- You can determine the number of times a customer can download a product.
- Customers who purchase a downloadable product can be required to log in before going through checkout.
- The delivery of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

Configuring Download Options

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

To configure download options:

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



Downloadable Product Options

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.

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 Item**s to "Yes."

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

Gift Cards

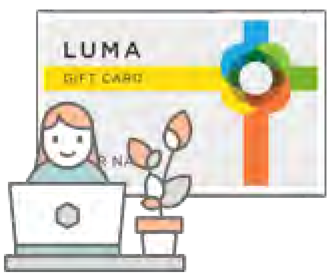
There are three kinds of gift card products: virtual gift cards sent by email, physical gift cards, which can be shipped to the recipient, and a combination of the two. Each gift card has a unique code, which can be redeemed by only one customer during checkout. A code pool must be established before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

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.



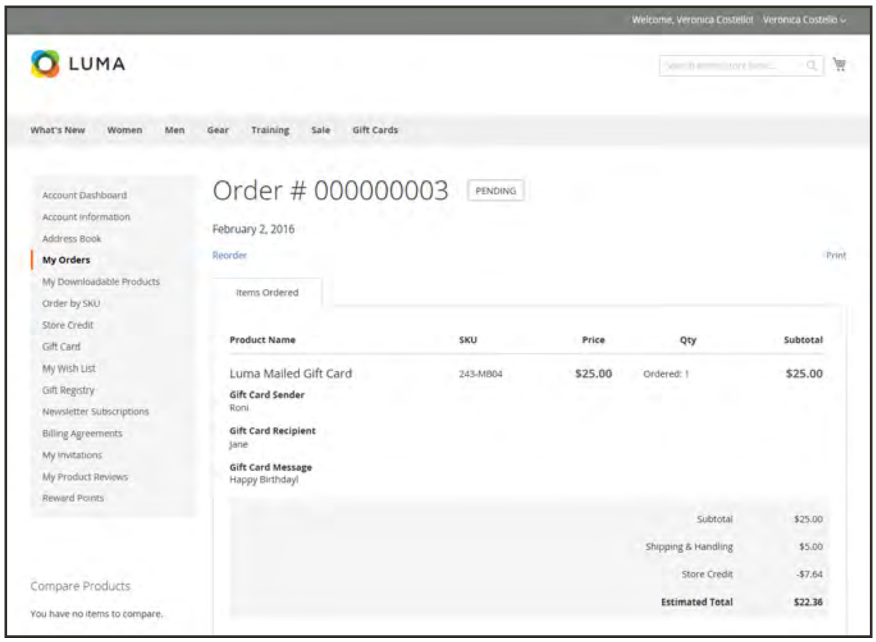
Combined

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

For example, a customer shopping in the demo Luma store can purchase either a virtual or physical gift card.

Virtual Gift Card

A Luma virtual gift card is emailed with an optional message to your special someone. It can be redeemed on any of the Luma family of websites and will never expire. Give the gift of purchase power!

Physical Gift Card

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

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

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

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

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

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

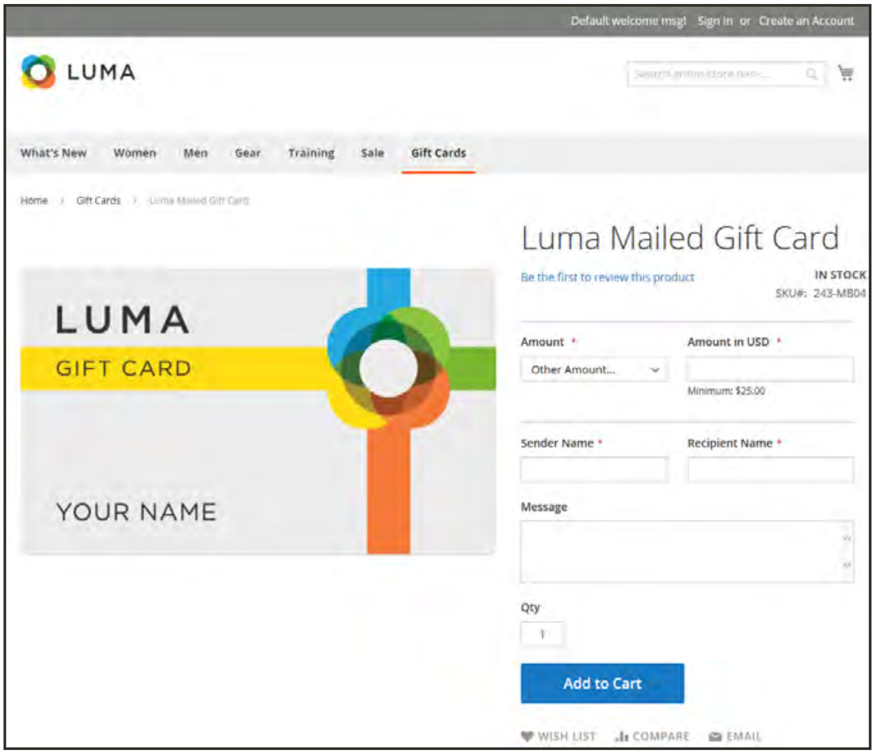
Physical gift cards can be shipped directly to the recipient, or to the customer, who can then personally deliver the gift card to the recipient.

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

If multiple gift cards are used to pay for a 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 Required Settings

Step 4: Complete the Basic Settings

Step 5: Complete the Gift Card Information

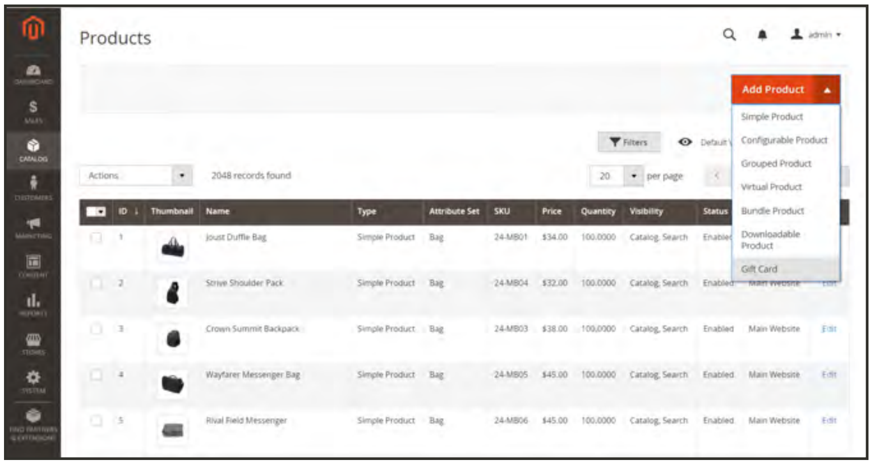
Step 6: Complete the Product Information

Step 7: Publish the Product

Step 1: Choose the Product Type

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

2. In the upper-right corner on the **Add Product** ( ) menu, choose **Gift Card**.

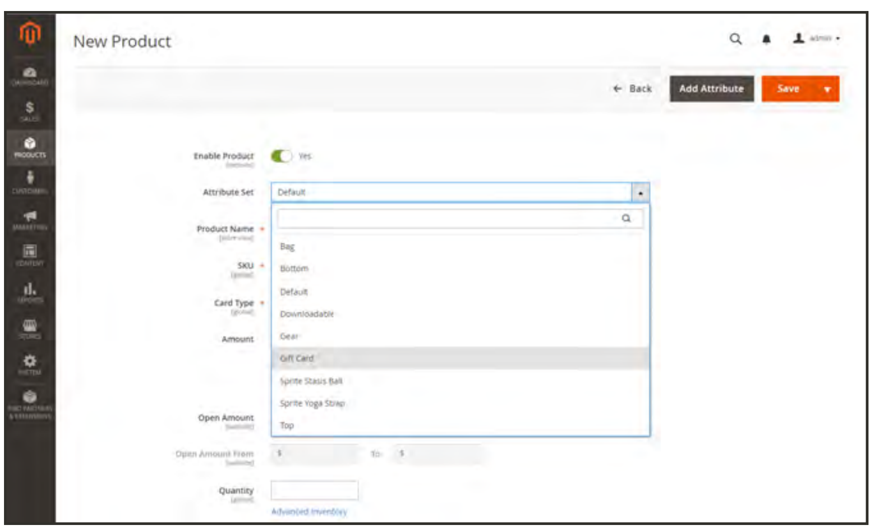


Add Gift Card

Step 2: Choose the Attribute Set

You can use the default "Gift Card" attribute set, or choose another. To choose the attribute set that is used as a template for the product, do one of the following:

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

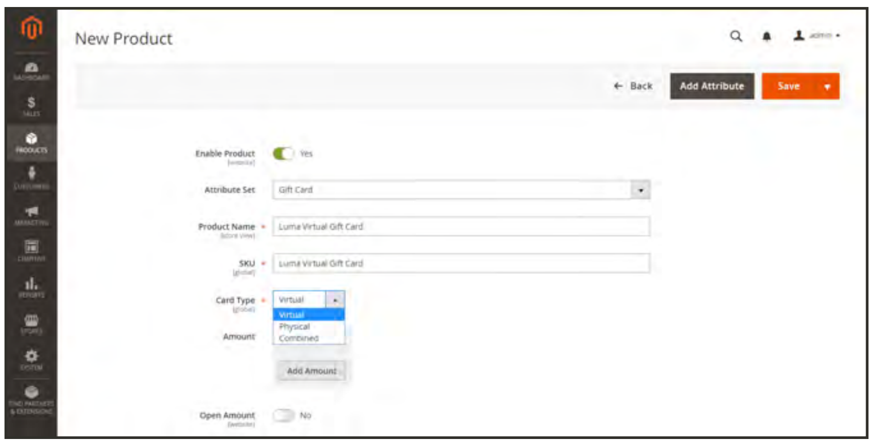


Choose Attribute Set

Step 3: Complete the Required Settings

1. Enter a **Product Name** for the gift card. You might also indicate the type of gift card in the name. For example, “Luma Virtual Gift Card.”
2. Enter a **SKU** for the product. By default, the Product Name is used as the default SKU.
3. Set **Card Type** to one of the following:

Virtual	Virtual gift cards are delivered by email to the recipient.
Physical	Physical gift cards can be mass produced in advance and embossed with unique codes.
Combined	A combined gift card has the characteristics of both a virtual and physical gift card.



Gift Card Type

1. To offer the customer a choice of fixed amounts, tap **Add Amount**. Then, enter the first fixed value of the card as a decimal. Repeat this step to enter the selection of fixed amounts.

Gift Card Amounts

2. To give customers the ability to set the value of the gift card, do the following:

   a. Set **Open Amount** to the “Yes” ( ) position.

   b. To define the range of minimum and maximum acceptable values, enter the **Open Amount From** and **To** values.

   You can create gift cards with fixed pricing, open amount pricing, or both.

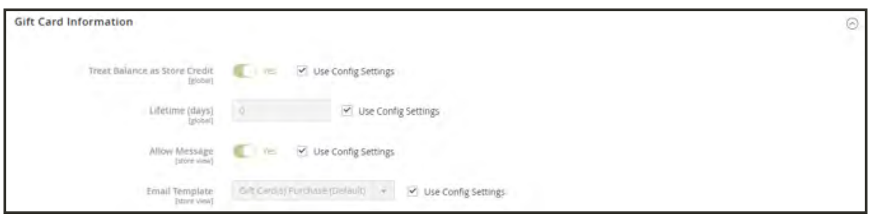
Step 4: Complete the Basic Settings

1. For a physical or combined gift card, enter the **Quantity** in stock.
2. If the gift card that is to be shipped, enter the **Weight** of the package.
3. In the **Categories** field, choose “Gift Card.”
4. There might be additional individual attributes that describe the product. The selection varies attribute set, and you can complete them later.

Step 5: Complete the Gift Card Information

1. Scroll down to the **Gift Card Information** section.

   The default settings in this section are determined by the system configuration.



Gift Card Information

2. Clear the **Use Config Settings** checkbox of any of the following fields that you want to change:

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

Step 6: Complete the Product Information

Complete the information in the following sections as needed:

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

Step 7: Publish the Product

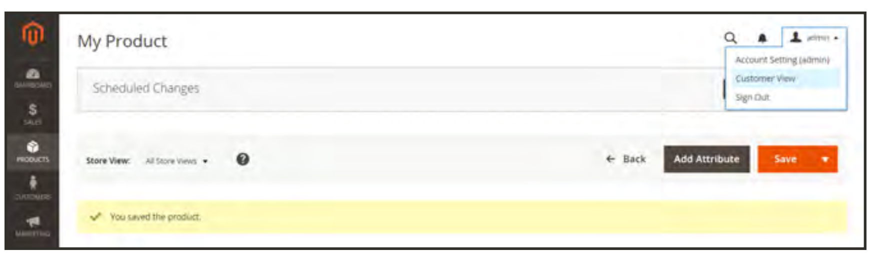
1. If you are ready to publish the product in the catalog, set the **Enable Product** switch to the "Yes" ( ) position.

2. Do one of the following:

Method 1: Save and Preview

1. In the upper-right corner, tap **Save**.

2. To view the product in your store, choose **Customer View** on the **Admin** ( ) menu,



Customer View

Method 2: Save and Close

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

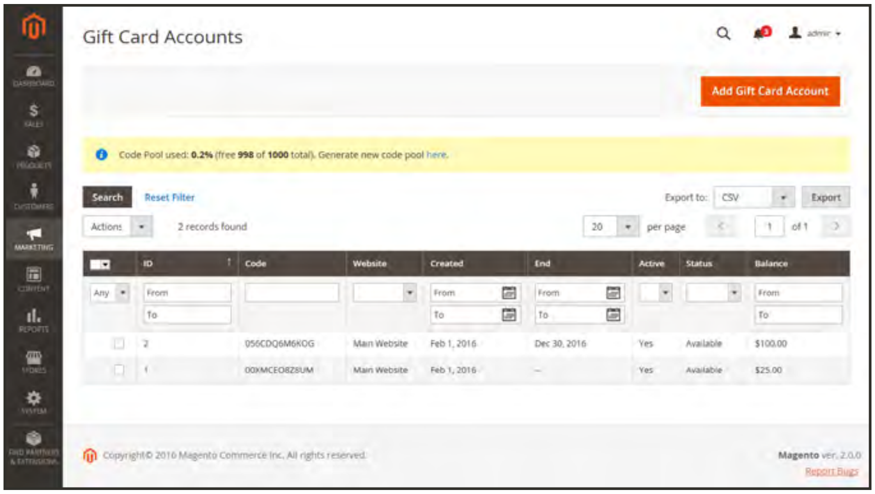
Save & Close

Things to Remember

- A “code pool” of unique numbers must be generated before a gift card can be offered for sale.
- The three types of gift cards are: Virtual, Physical, and Combined.
- Gift cards can be set to “Redeemable” or “Non-Redeemable.”
- The lifetime of a gift card can be unlimited, or set to a number of days.
- The value of a gift card can be set to a fixed amount, or set to an open amount with a minimum and maximum value.
- A gift card account for the customer can be created when the order is placed, or at the time of invoice.

Gift Card Accounts

A gift card account is automatically created for each Gift Card that is purchased. The value of the gift card can then be applied toward the purchase of a product in your store. You can also create gift card accounts from the Admin as a promotion or service for customers. The gift card account number corresponds to the gift card code.



Gift Card Accounts

To examine an existing gift card account:

1. If you need to find the number of the gift card account for a current order, do the following:

   a. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.

   b. Find the order in the list, and in the **Action** column, click **View**.

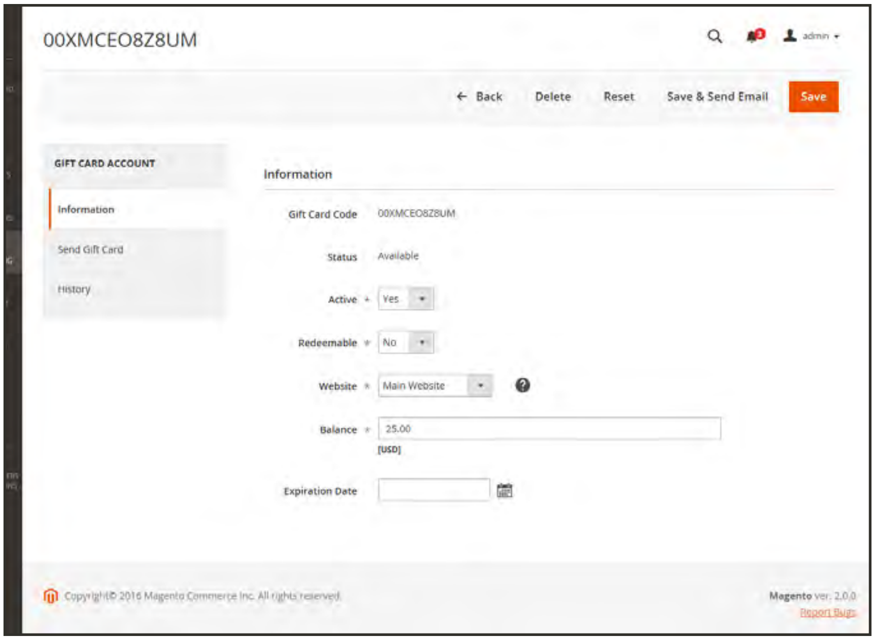
   c. Scroll down to the Items Ordered section. The number is in the Product column, under **Gift Card Accounts**.

2. On the Admin sidebar, tap **Marketing**.

3. Under **Promotions**, choose **Gift Card Accounts**.

4. Find the gift card account in the grid, and open in edit mode.

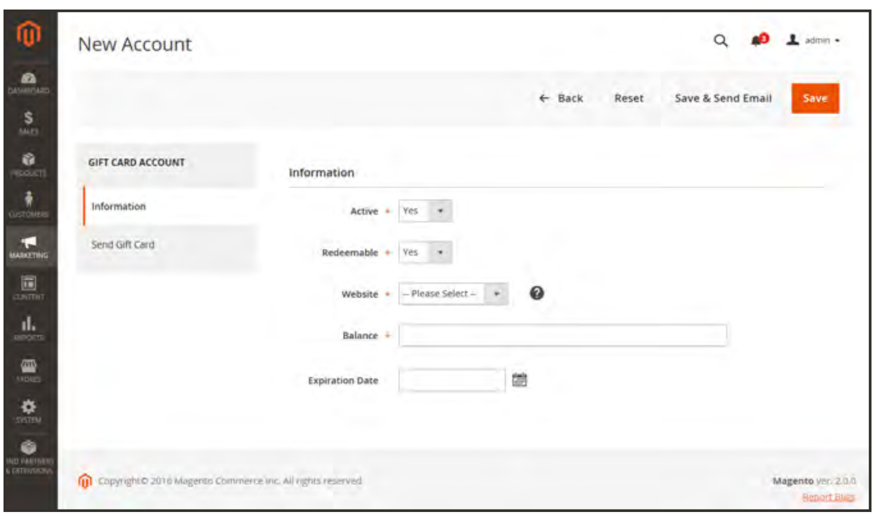
   The Gift Card Code appears at the top of the Information section.



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

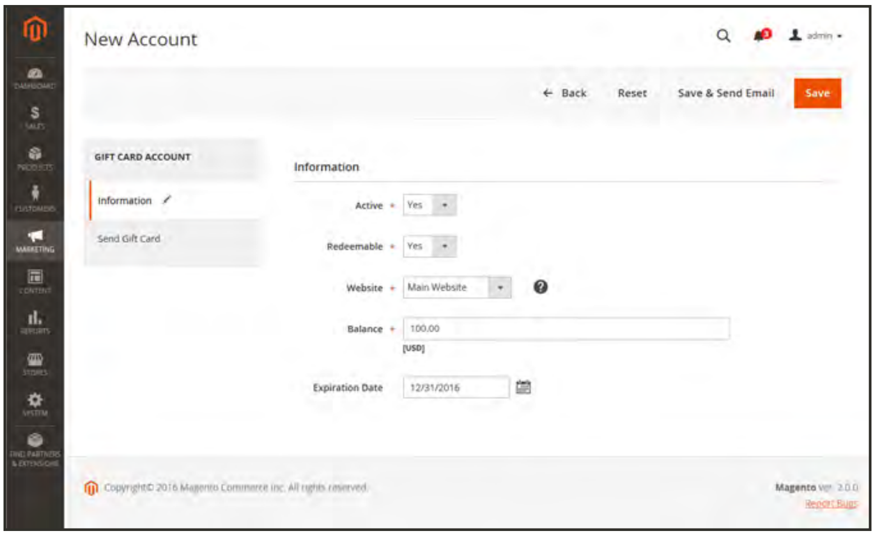
3. In the **Information** section, make sure that **Active** is set to “Yes.” Then, do the following:

   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.



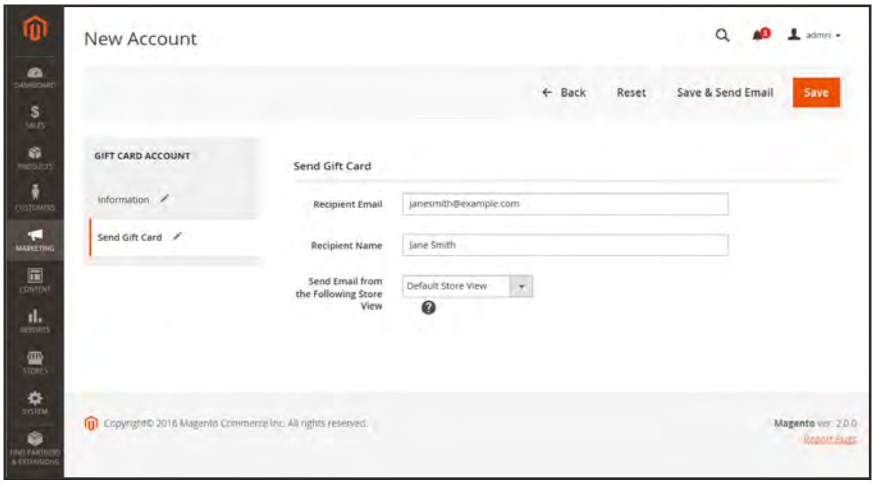
Gift Card Information

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

The Gift Card configuration establishes the default settings for all gift cards for the store view, and manages the code pool. The code pool is a set of unique gift card codes in a specific format. Codes from the pool are used each time a gift card account is created. It is the responsibility of the store administrator to ensure that there are enough codes available for gift card sales. Make sure to generate a code pool before offering gift cards for sale. By default, Magento generates 1,000 codes. A new pool is not generated until there are no more codes available in the current pool.

Step 1: Configure Email Notifications

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Gift Cards**.
3. Expand the **Gift Card Email Settings**section. Then do the following:
    a. Set **Gift Card Notification Email Sender** to the store identity that appears as the sender of gift card notifications.
    b. Set **Gift Card Notification Email Template** to the template that is used for the notification.

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."

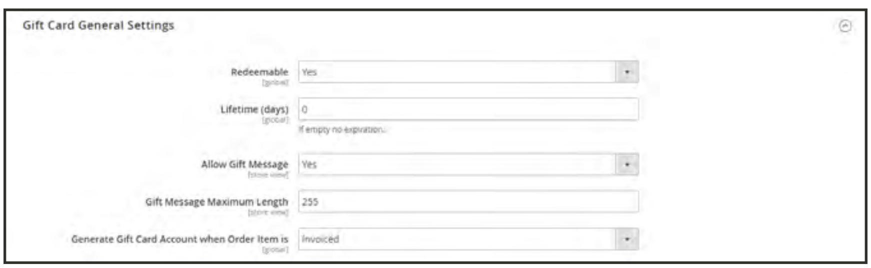
3. In the **Lifetime (days)** field, enter the number of days before the card expires. Leave the field blank if there is no expiration date.

> 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 13:

Product Settings

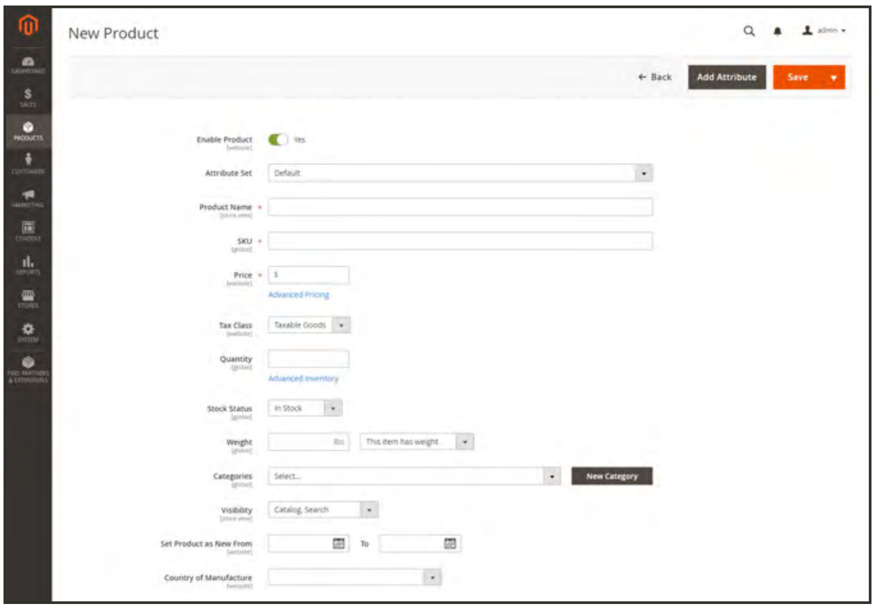
The most frequently used product settings and attributes are located at the top of the page, followed by custom attributes. Any other product settings are in expandable sections at the bottom of the page.

Product Settings

Advanced Product Settings

To access the advanced pricing and inventory settings, click the link below the Price and Quantity fields. To learn more, see:

- Managing Pricing
- Managing Inventory



Advanced Links

Other Product Settings

The remaining product settings are located at the bottom of the page. Some settings are available for all products, and others are available for specific product types. Additional settings might appear when the product is saved for the first time.

To expand or collapse each section:

Tap the section. The button indicates if it is currently expanded or collapsed .

Other Settings

General Settings

SECTION	DESCRIPTION
Content	The Content section is used to enter the main product description that appears on the product page. The short description can be used in most RSS feeds, and might also appear in catalog listings, depending on theme. The product description can be formatted using the editor toolbar.
Product Reviews	The Product Reviews section lists all reviews that customers have submitted about the product. The section appears only after a new product has been saved.
Images and Videos	From the Images and Videos section, you can perform basic image management tasks such as upload multiple images, rearrange the order of images, and control how each image is used. For more control over individual images, you can open each image in “detail view.”

SECTION	DESCRIPTION
Search Engine Optimization	The Search Engine Optimization section specifies the URL Key and meta data fields that are used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in both the meta title and meta description.
Related Products, Up-Sells, Cross-Sells	This section is used to set up simple promotional blocks that present a selection of additional products that might be of interest to the customer.
Product in Websites	The Product in Websites section shows the current scope of the product within the store hierarchy.
Design	The Design settings give you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code
Gift Options	Gift Options can be set at the product level to allow a gift message to be added to the product during checkout.

Product-Specific Settings

SECTION	DESCRIPTION
Configurations	The Configuration section lists any existing variations of the product, and can also be used to generate variations for use with the Configurable product type.
Customizable Options	Customizable options are based on variations of a single SKU, and can be a good solution if your inventory needs are simple.
Downloadable Information	The Downloadable Information section is used to generate the links to downloadable products and samples.
Grouped Products	The Grouped Products section is used to add items to a Grouped product type, and also to edit the current selection of items.
Bundle Items	The Bundle Items section is used to add items to a Bundle product type, and also to edit the current selection of items.

Content

The Content section is used to enter and edit the main product description that appears on the product page. The short description can be used in most RSS feeds, and might also appear in catalog listings, depending on theme. The product description can be formatted using the editor toolbar.

Enter only plain ASCII characters into the text box. If pasting text from a word processor, save it first as a plain .TXT file to remove any invisible control characters.

Content

To enter the product description:

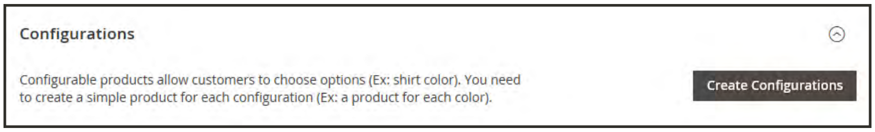
1. Open the product in edit mode. Then, scroll down and expand the **Content** section.
2. Enter the main product **Description**, and use the toolbar to format as needed.

   You can drag the lower-right corner to change the height of the text box.
3. Enter a **Short Description** of the product, and format as needed.

   To learn more, see: Using the Editor.

Configurations

The Configurations section lists any existing variations of the product, and can also be used to generate variations for use with the Configurable product type. To learn more, see: Configurable Product.

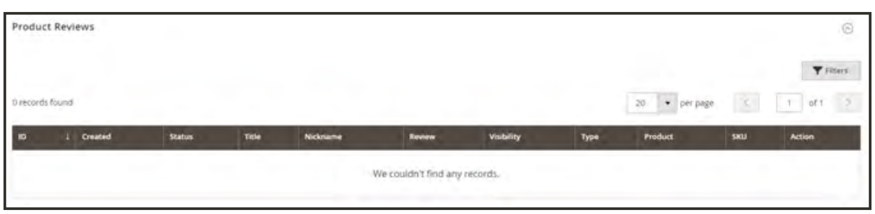


Configurations Section

Product Configurations

Product Reviews

The Product Reviews section lists all reviews that customers have submitted about the product. The section appears with the other product information only after a new product has been saved for the first time. To learn more, see: Product Reviews.



Product Reviews

Images and Videos

From the Images and Videos section, you can perform basic image management tasks such as upload multiple images, rearrange the order of images, and control how each image is used. For additional control over individual images you can open each image in “detail view.” To learn more, see: Catalog Images and Video.

To upload an image:

1. Open the product in edit mode.

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

Images and Videos

3. If you're ready to add a product image, do one of the following:

   - Drag an image from your desktop, and drop it on the **camera** ( ) tile.
   - Tap the **camera** ( ) tile, and navigate to the image file on your computer. Then, choose the image, and tap **Open**.

   A placeholder image appears in the catalog until a product image is available.

Search Engine Optimization

The Search Engine Optimization section specifies the URL Key and meta data fields that are used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current SEO best practice is to incorporate high-value keywords in both the meta title and meta description.

The default value for each meta data field can be auto-generated based on values specified in the configuration. Each field contains a placeholder that is replaced by an actual value. To learn more, see: Default Field Values.

Search Engine Optimization

To complete the SEO fields:

1. Open the product in edit mode. Then, scroll down and expand the **Search Engine Optimization** section.
2. The default **URL Key** is based on the product name. You can use the default, or change it as needed. To learn more, see: Catalog URLs.
3. The **Meta Title** is the text that appears at the top of the browser window. You can use the default, which is based on the Product Name, or change it as needed.
4. The **Meta Keywords** are used by some search engines more than others. Enter a few high-value key words to help the product gain more visibility.
5. The **Meta Description** is the text that appears in search results listings. For best results, enter a description that is between 150-160 characters in length.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
URL Key	Store View	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

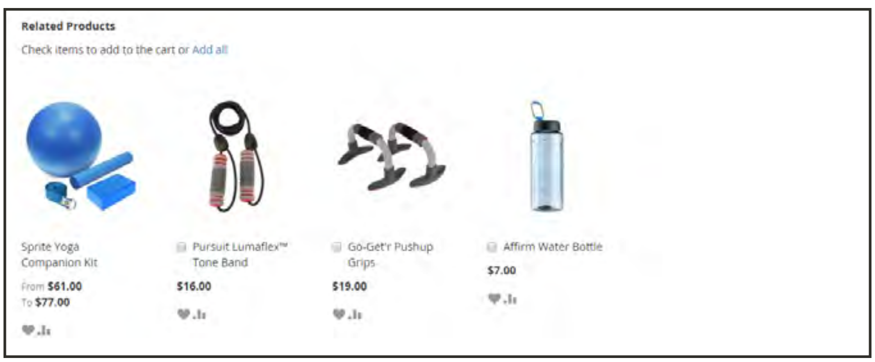
Related Products, Up-Sells, and Cross-Sells

This section is used to set up simple promotional blocks that present a selection of additional products that might be of interest to the customer. To learn more, see: Product Relationships.

Related Products, Up-Sells, and Cross-Sells

Related Products

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



Related Products

To set up related products:

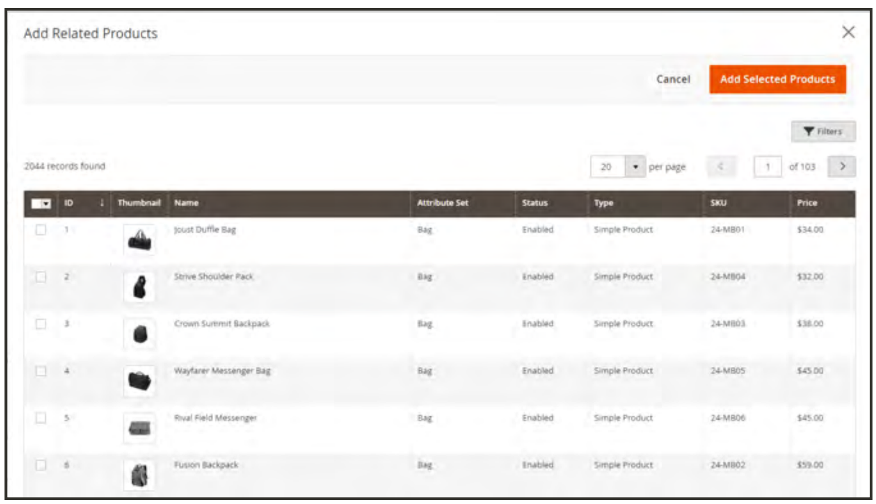
1. Open the product in edit mode.

2. Scroll down and expand the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Related Products**.

Related Products

3. Use the filter controls to find the products that you want.

4. In the list, mark the checkbox of any product you want to feature as a related product.

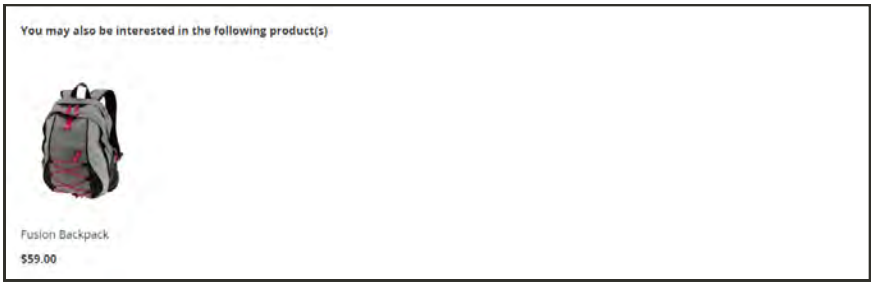


Related Products

5. When complete, tap **Add Selected Products**.

Up-sells

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



Upsell

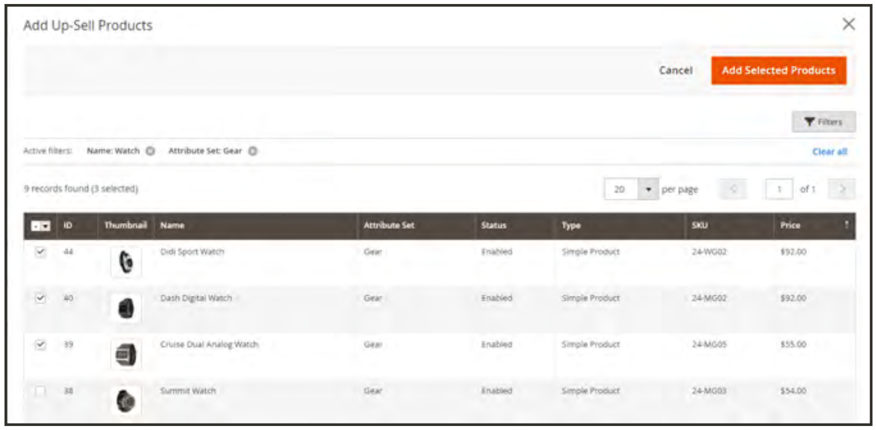
To select up-sell products:

1. Open the product in edit mode.
2. Scroll down and expand the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Up-Sell Products**.

Add Upsell Products

3. Use the filter controls to find the products that you want.

4. In the list, mark the checkbox of any product you want to feature as an up-sell product.

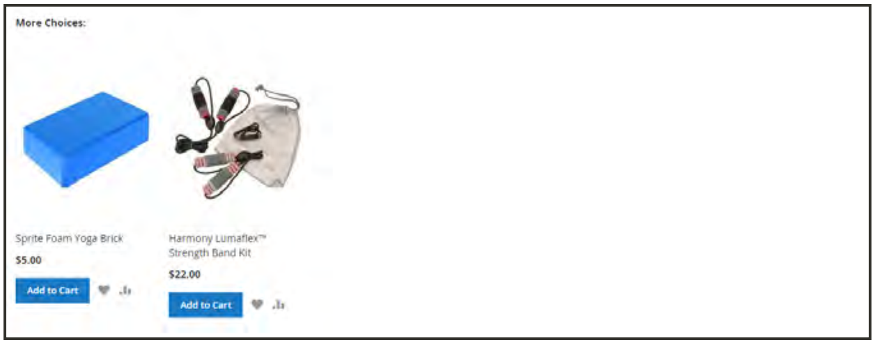


Upsell Products

5. When complete, tap **Add Selected Products**.

Cross-sells

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



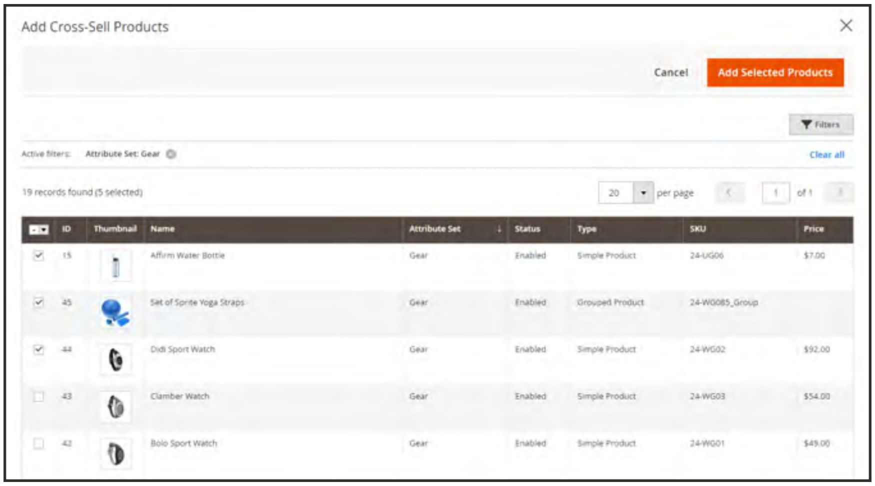
Cross-sells in Shopping Cart

To select cross-sell products:

1. Open the product in edit mode.
2. Scroll down and expand the **Related Products, Up-Sells, and Cross-Sells** section. Then, tap **Add Cross-Sell Products**.

Add Cross-Sell Products

3. Use the filter controls to find the products that you want.
4. In the list, mark the checkbox of any product you want to feature as a cross-sell product.



Cross-sell Products

5. When complete, tap **Add Selected Products**.

Customizable Options

Adding customizable options to a product is an easy way to offer customers a selection of options with a variety of text, selection, and date input types. Customizable options are a good solution if your inventory needs are simple. However, because they are based on variations of a single SKU, they cannot be used to manage stock. If you have multiple products with the same options, you can set up one product, and import the options to the other products.

To create customizable options:

1. Open the product in edit mode.

2. Scroll down and expand the **Customizable Options** section. Then, tap **Add Option**.

Customizable Options

3. In the upper-left corner, tap **New Option**. Then, do the following:

   a. In the **Option Title** field, enter a name for the option.

   b. Set the **Option Type** for data entry.

   c. If the option is not required to purchase the product, clear the **Required** checkbox.

New Option

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

Add Value

a. In the **Title** field, enter a name for this option.

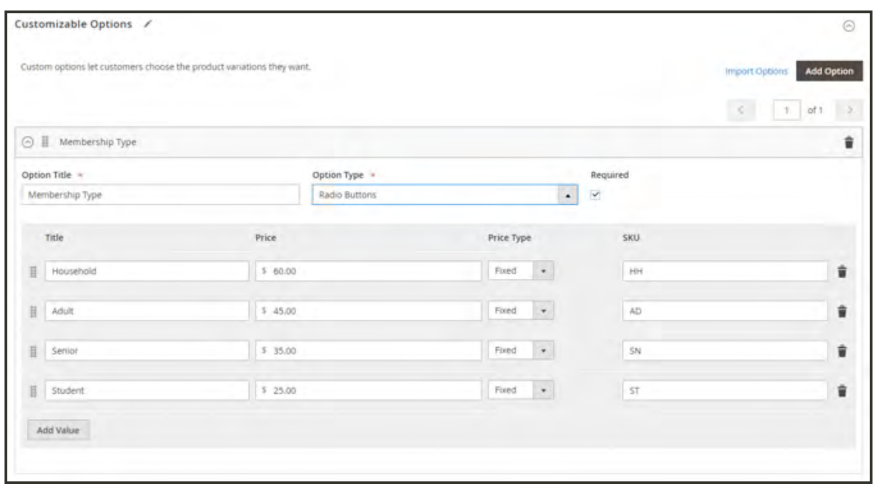
b. In the **Price** field, enter any markup or markdown from the base product price that applies to this option.

c. Set **Price Type** to one of the following:

Fixed	The price of the variation differs from the price of the base product by a fixed monetary amount, such as $1.
Percentage	The price of the variation differs from the price of the base product by a percentage, such as 10%.

d. Enter a **SKU** for the option. The option SKU is a suffix that is added to the product SKU.

e. To change the order of the options, tap the **Change Order** icon, and drag the option to a new position in the list.



Change Order of Options

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

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

To import customizable options:

1. In the Customizable Options section, tap **Import Options**.

Customizable Options

2. All products with customizable options appear in the grid.
3. In the list, mark the checkbox of the product with the options that you want to import.
4. Tap **Import**.
5. When complete, you can continue to add more custom options, or tap **Save and Close**.

Input Controls

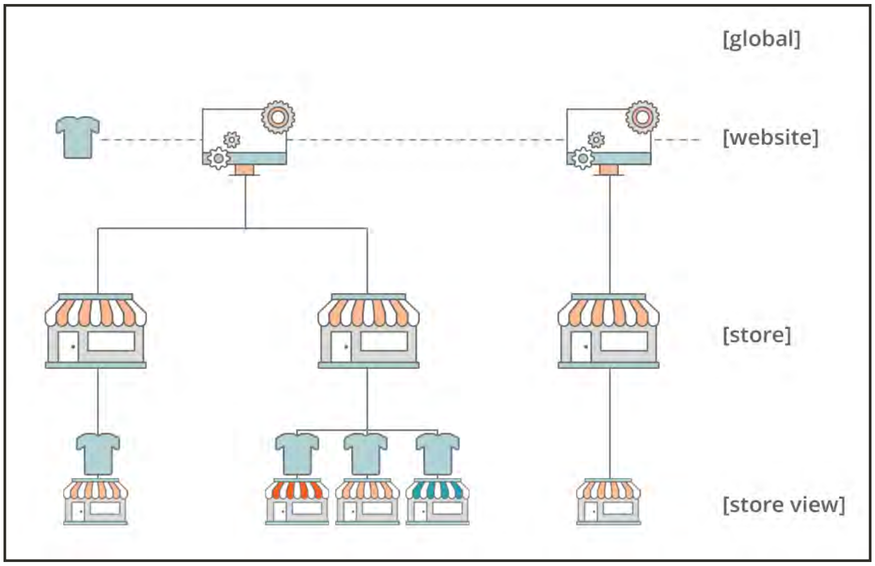
INPUT TYPE	DESCRIPTION	
TEXT		
	Field	A single line input field for text.
	Area	A multiple-line input box for paragraphs of text. You can use the WYSIWYG Editor to format the text with HTML tags, or type HTML directly into the text area.
FILE		
	File	A file to be uploaded by the customer.
SELECT		
	Drop-down	A drop-down list of options. Only one item can be selected at a time.
	Radio Buttons	A set of options that allows only one to be selected at a time.

Input Controls (cont.)

INPUT TYPE	DESCRIPTION	
	Checkbox	A checkbox is a variation of a yes/no option. If the product has more than one checkbox, multiple selections can be made at the same time.
	Multiple Select	A drop-down list of options that accepts multiple selections. To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.
DATE		
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.

Product in Websites

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



Multisite Installation

To copy a product to a different website:

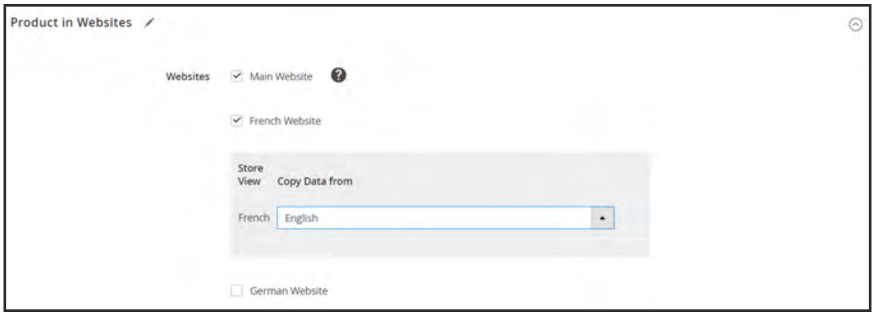
1. Open the product in edit mode.
2. Scroll down and expand the **Product in Websites** section.

Product in Websites

3. Mark the checkbox of the website where the product is to be copied

   For an single website installation, the website checkbox is marked by default.

4. Choose the **Store View** where the product is to be copied from.



Product in Websites

5. When complete, tap **Save**. Then, do the following:

   a. When you return to the product record, set the **Store View** chooser to the store view to which the product was copied. When prompted to confirm scope switching, tap **OK**.

   b. Enter the **Price** of the product for this store view.

   Because the scope of the base currency is set to "website," it is possible to sell the product for a different price in each website.

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

Design

The Design settings give you the ability to apply a different theme to the product page, change the column layout, determine where product options appear, and enter custom XML code.

Design

Field Descriptions

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

Autosettings

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

Autosettings

Gift Options

Gift Options can be set at the product level to allow a gift message to be included during checkout. To override the default configuration setting, clear the Use Config Settings checkbox.

Gift Options

To set gift options for a single product:

1. Open the product in edit mode.

   Scroll down and expand the **Gift Options** section. Then, do the following:

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

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

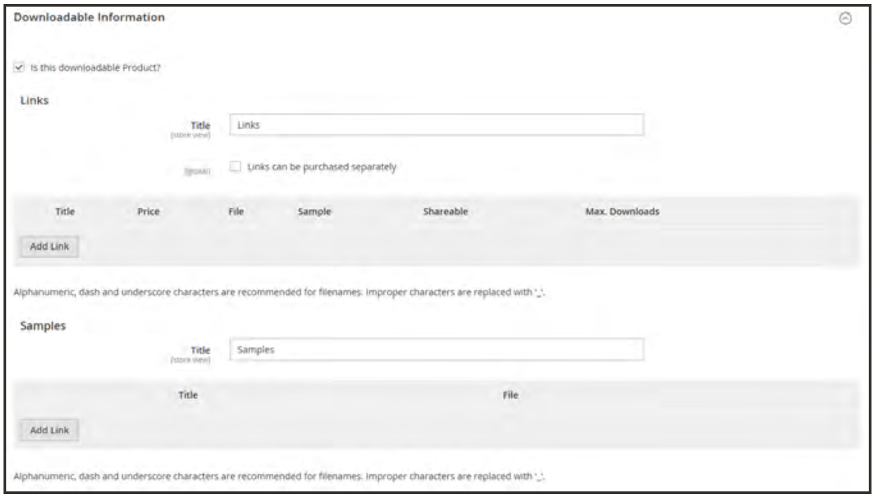
   c. Set **Allow Gift Wrapping** as needed for the product.

   d. If applicable, enter the **Price for Gift Wrapping**.

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

Downloadable Information

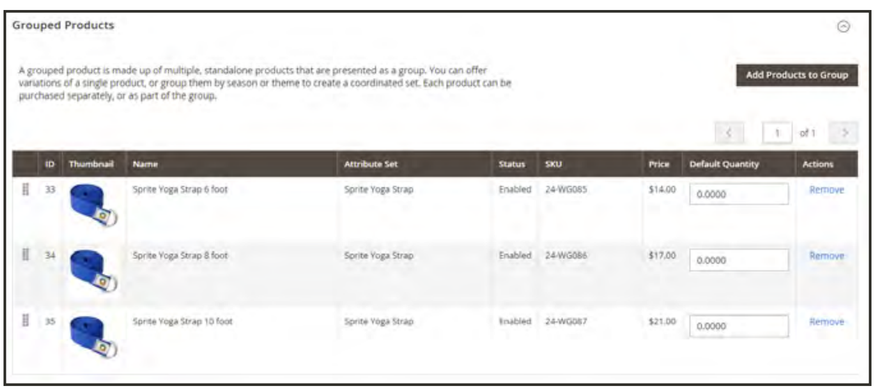
The Downloadable Information section is used to generate the links to downloadable products and samples. To learn more, see: Downloadable Product.



Downloadable Information

Grouped Products

The Grouped Products section is used to add individual products to a Grouped product. After the products are added, they appear in the section.

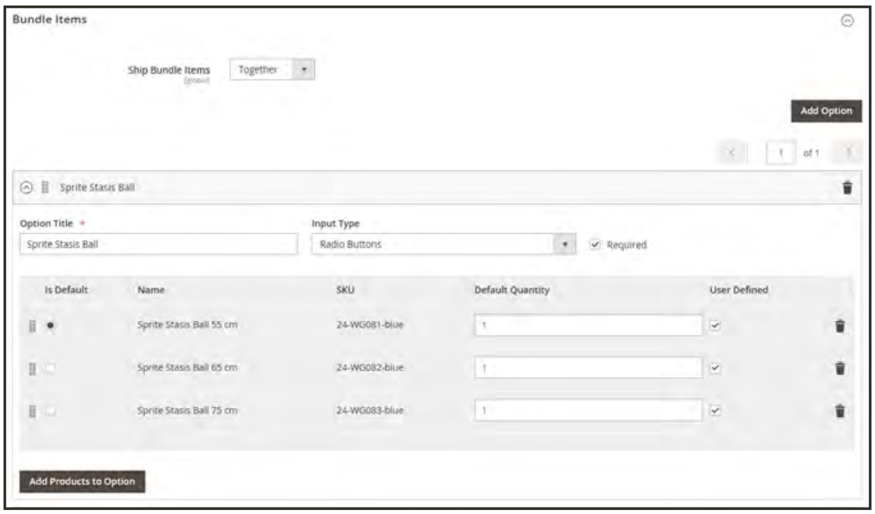


Grouped Product Items

Bundle Items

The Bundle Items section is used to add items to a Bundle product type, and also to edit the current selection of items.

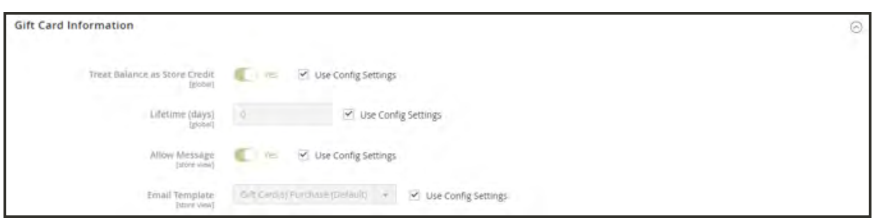
Bundle Items Section



Bundle Items

Gift Card Information

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



Gift Card Information

CHAPTER 14:

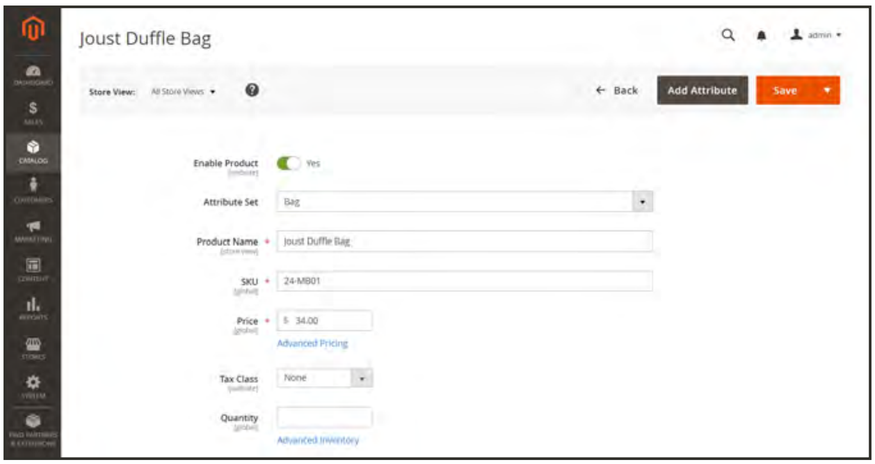
Managing Price

Magento supports a number of pricing options that you can use for promotions, or to meet the minimum advertised pricing requirements of the manufacturer. Changes to product pricing can be made on schedule, or by price rule that is applied at the product level or in the shopping cart. Topics in this chapter:

Advanced Pricing

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

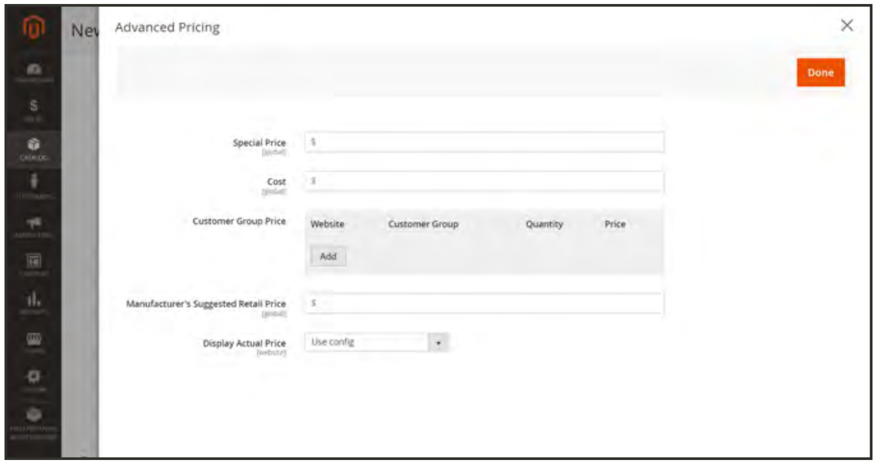
Advanced pricing data is synchronized with product pages. For example, if you update a tier price quantity, the system updates the value on the product page.



Advanced Pricing

To display the Advanced Pricing options:

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



Advanced Pricing

Field Descriptions

FIELD	DESCRIPTION
Special Price	Offers a discounted price during a scheduled campaign. When a special price is available, the retail price is crossed out and the special price appears below in large, bold text.
Cost	The actual cost of the item.
Customer Group Price	Sets up promotional and tier prices for specific customer groups for the current website. Options include: Website — Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites. (Required) Identifies the customer group that qualifies to receive the discount price. When a value in a group or catalog field is changed, the corresponding custom price row that matched the previous setting is deleted from the shared catalog Options: ALL GROUPS Applies the rule to all customer groups. NOT LOGGED IN Applies the rule guests and customers who are not logged in to their accounts.

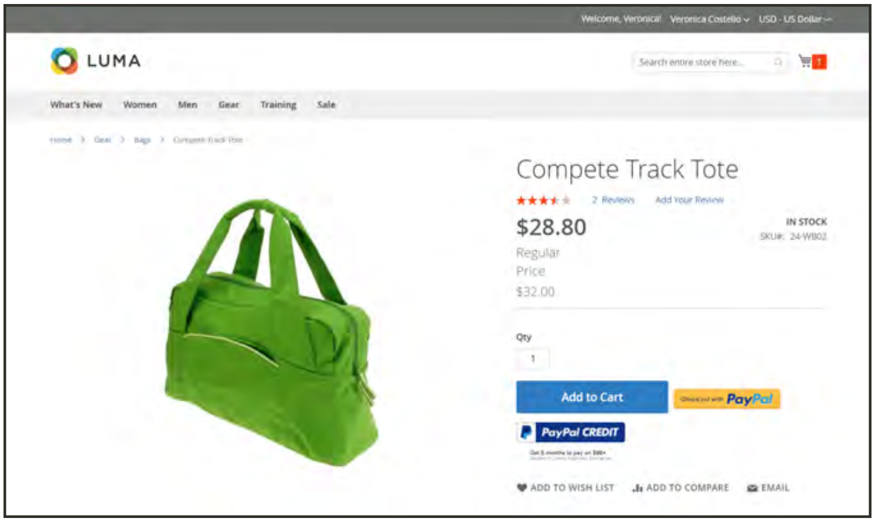
Field Descriptions (cont.)

FIELD	DESCRIPTION		
	Quantity	Specifies the quantity that is required to receive a tier price.	
	Price	(Required) Specifies a fixed or discount product price for members of the customer group, within the specific website. Options: Fixed / Discount	
		Fixed	(Default) The discount price is entered as a fixed decimal value. For example, enter “9.99” as the discount price.
		Discount	The discount price is entered as a percentage (%) of the base product price. For example, enter “10” for a 10% discount.
		Deletes the current rule.	
	Add	Inserts an additional row for a new rule	
Manufacturer's Suggested Retail Price	The manufacturer's suggested retail price (MSRP) for the product.		
Display Actual Price	Determines where the actual price of the product is visible to the customer. Options:		
	Use Config	Uses the current configuration setting for the price display.	
	On Gesture	Displays the actual product price in a popup, in response to the "Click for price" or What's this?" link.	
	In Cart	Displays the actual product price in the shopping cart.	
	Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is submitted.	

Group Price

A discounted price on any product can be extended to members of a specific customer group, provided they shop while logged in to their accounts. The discounted price appears on the product page with the regular price noted below, and replaces the regular price in the shopping cart.

Customer group prices are a component of tier pricing, and are set up in a similar way. The only difference is that customer group prices have a quantity of 1.

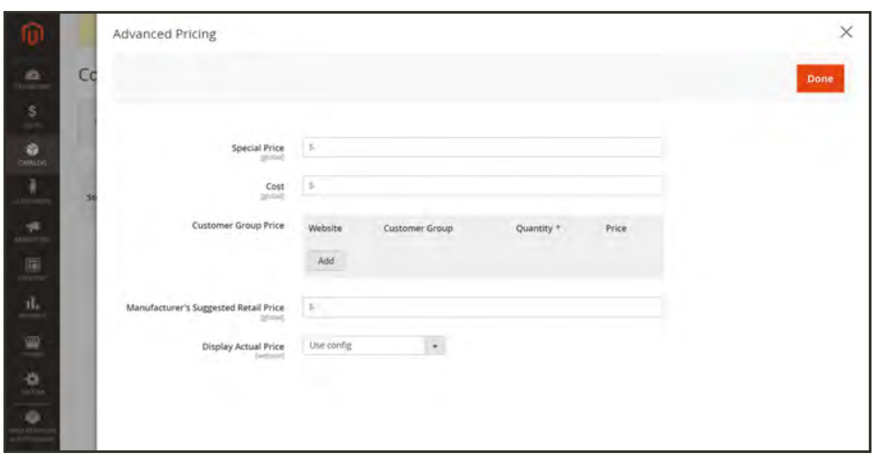


Customer Group Discount

To set up a group price:

1. Open the product in edit mode. Then below the **Price** field, click **Advanced Pricing**.

2. In the **Customer Group Price** section, tap **Add**. Then, do the following:



Group Price

a. For a multisite installation, choose the **Website** where the group price applies.

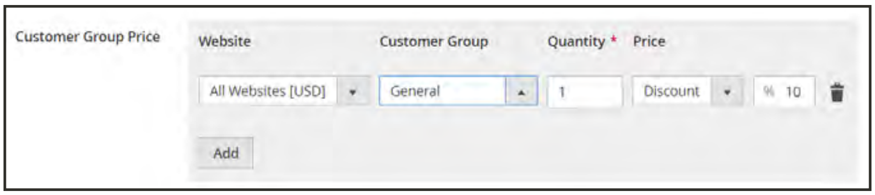
b. Choose the **Customer Group** that is to receive the discount.

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

d. Under **Price**, do one of the following:

- Choose **Fixed**. Then, enter the discounted product price.
- Choose **Discount**. Then, enter the discounted price as a percentage of the product price.

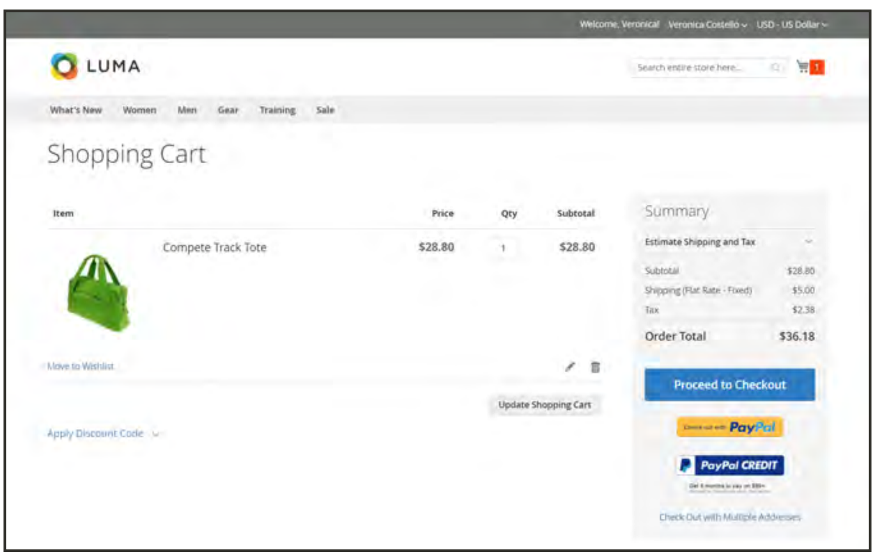
The following example extends a 10% discount to members of the General customer group who are logged in to their customer accounts.



10% Discount Customer Group Price

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

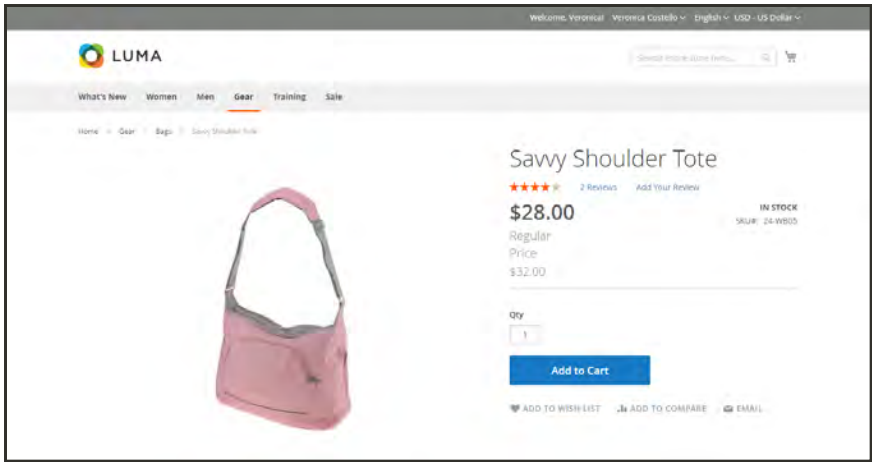
4. When complete, tap **Done**. Then, tap **Save**.



Group Price in Shopping Cart

Special Price

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

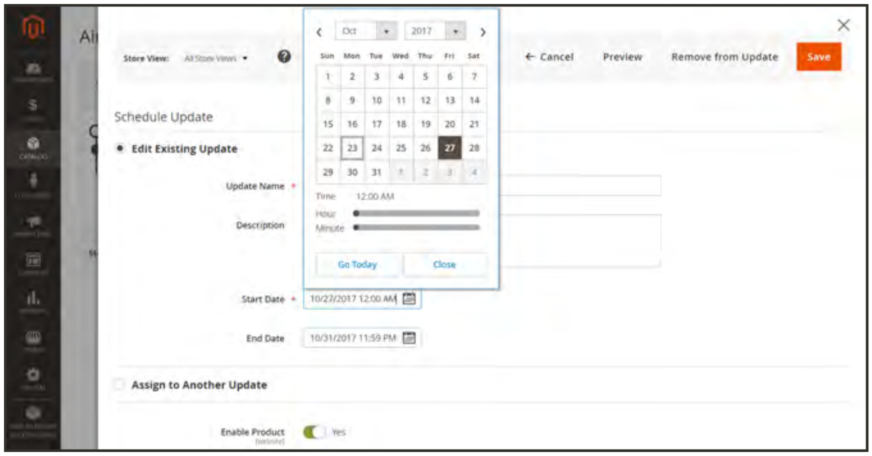


Special Price on Product Page

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

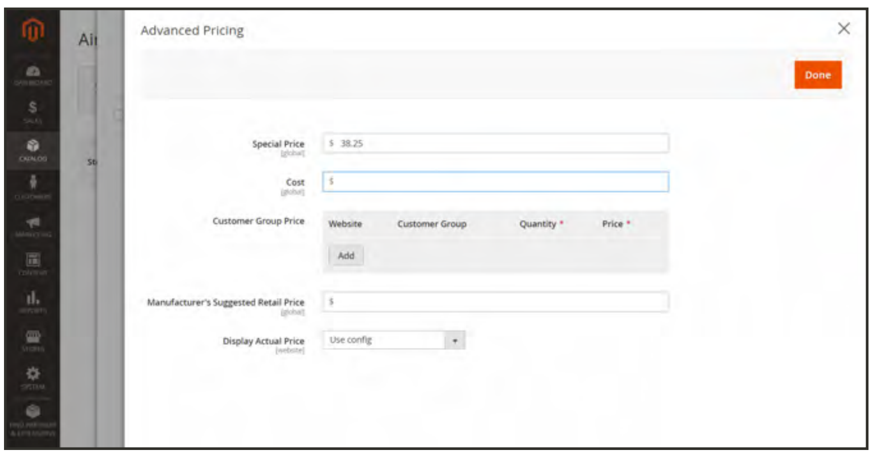
Method 1: Apply Special Price to an Individual Product

1. Open the product in edit mode.
2. Tap **Scheduled Update**. Then, do the following:
   a. In the **Update Name** field, enter a name for the special price promotion.
   b. Enter a brief **Description**.
   c. Use the **Calendar** ( ) to choose the **Start Date** and **End Date** for the special price promotion. Use the **Hour** and **Minute** sliders to choose the start and end time, as well. Then, tap **Close**.



Save as New Update

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



Special Pricing Settings

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

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

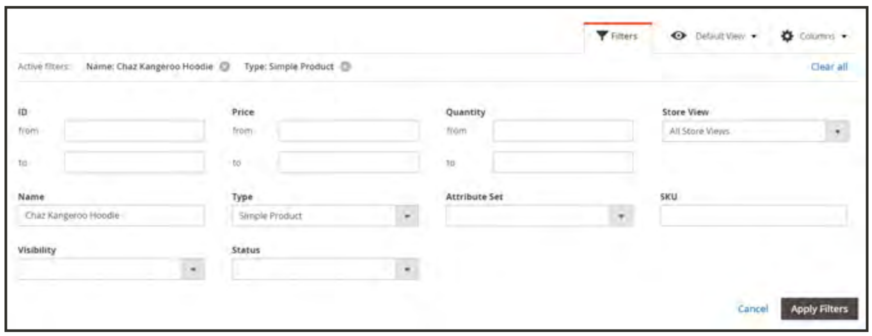
The Scheduled Change appears at the top of the page.

Scheduled Change

Method 2: Apply Special Price to Multiple Products

The following example shows how to assign the same special price to multiple product variations of a configurable product.

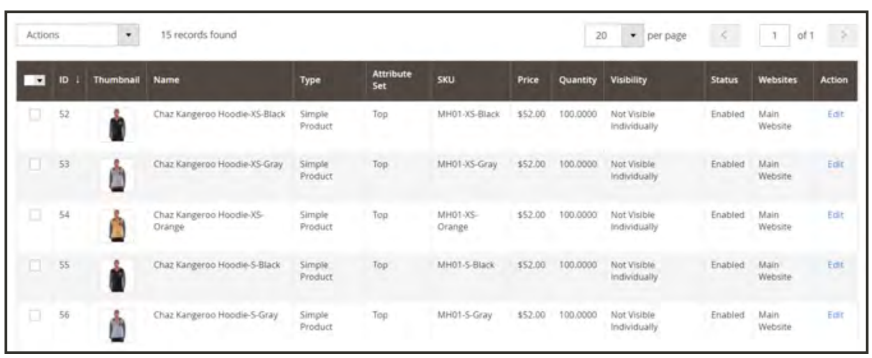
1. On the Admin sidebar, tap **Catalog**. Then, choose **Products**.
2. Tap **Filters**. Then, do the following:
   a. Enter the **Name** of the configurable product.
   b. Set **Type** to "Simple Product."



Filters

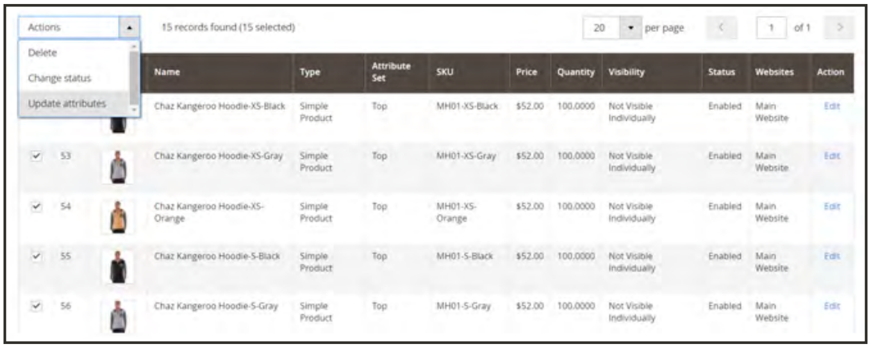
   c. Tap **Apply Filters**.

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



Product Variations

3. If you want to assign the same special price to all of the products, set the control in the header of the first column to "Select All." Otherwise, mark the checkbox of each product that you want to include.
4. Set the **Actions** control to "Update attributes."



Update Attributes

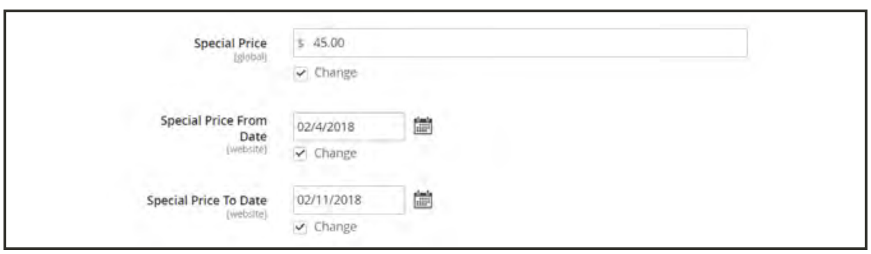
5. Scroll down to the **Special Price** field. Then, do the following:

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

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

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

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

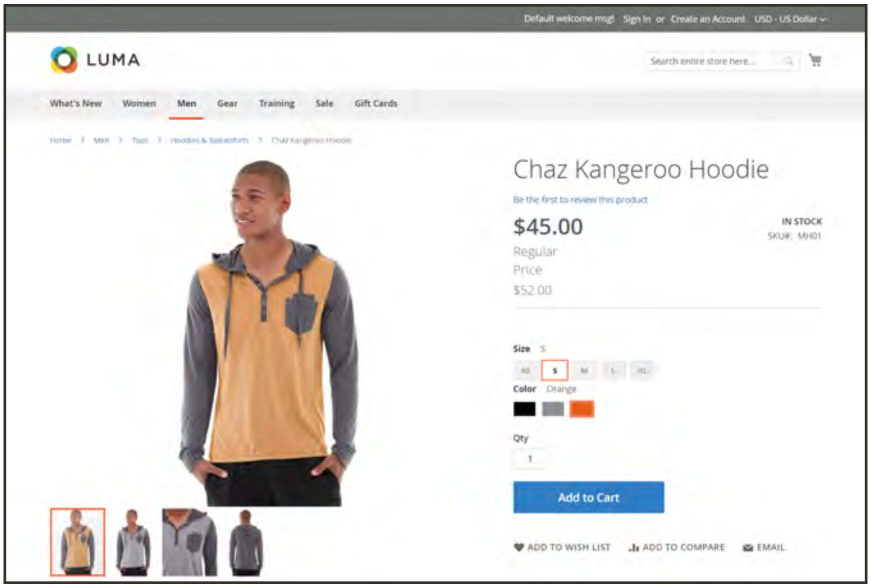


Special Price Fields

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

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

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



Special Price for Configurable Product

Troubleshooting

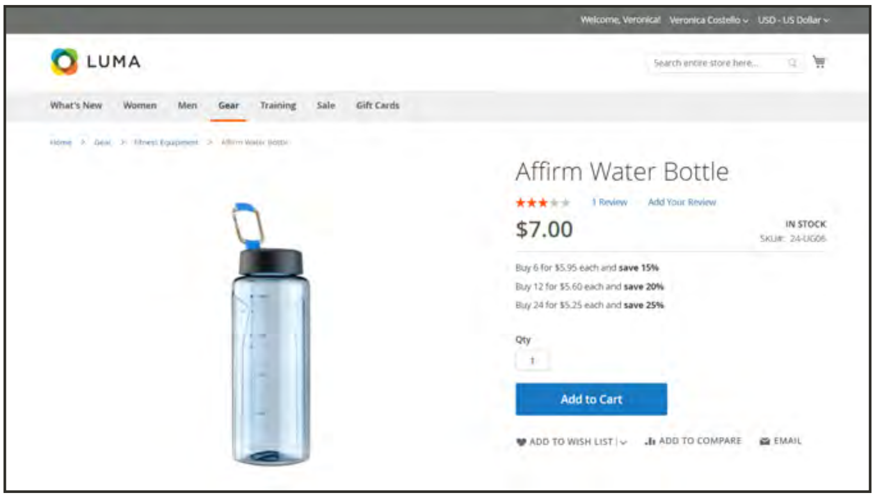
If the special price doesn't appear correctly in the storefront on both the catalog listing and product pages, do the following:

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

Tier Price

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

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



Tier Price on Product Page

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

The prices in the storefront take precedence from the highest to the lowest quantity. Therefore, if you have a tier for the quantity 5 and one for the quantity 10, and a customer adds 5, 6, 7, 8 or 9 items to the shopping cart, the customer receives the discounted price that you specified for the quantity 5 tier. As soon as the customer adds the 10th item, the discounted price specified for the quantity 10 tier supersedes the tier for a quantity of 5, and discounted price for 10 applies.

To set up a tier price:

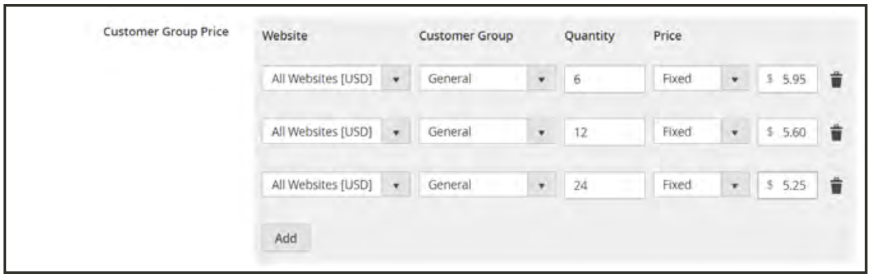
1. Open the product in edit mode.
2. Below the **Price** field, click **Advanced Pricing**.
3. In the **Tier Price** section, tap **Add**. If you're creating a tier of several prices, tap **Add** for each additional level, so you can work all tiers at the same time. Each tier in the group has the same website and customer group, but a different quantity and price.
4. For each tier, do the following:
   a. If your store has multiple websites, choose the **Website** where the tier pricing applies.
   b. If necessary, choose the **Customer Group** that is to receive the discount.

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

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

Method 1: Enter Price as Fixed Amount

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



Tier Price as a Fixed Amount

Method 2: Enter Price as Percentage

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

Tier Price as a Percentage

5. To add another set of tier pricing for a different website or customer group, repeat the process.
6. When complete, tap **Done**. Then, tap **Save**.

Minimum Advertised Price

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

MAP Logic

For products with prices that depend on a selected options, (such as custom options, or simple products with their own SKUs and stock management), the following logic is applied, according to the product type and price setting. The actual price is used by order management and customer management tools, and reports.

Using MAP with Product Types

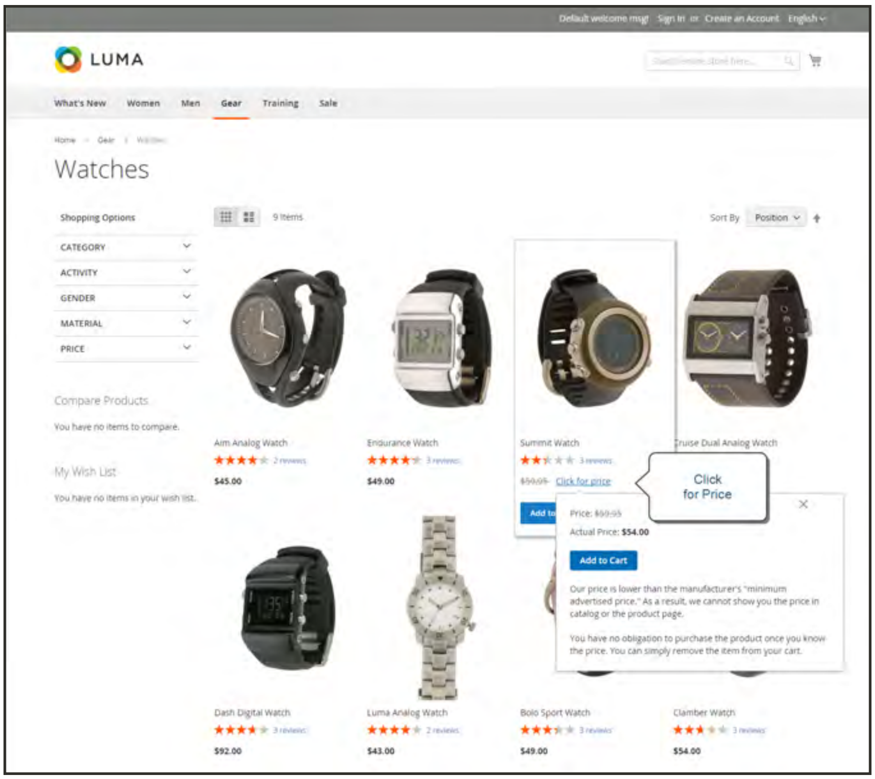
PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Custom option prices appear normally.
Grouped	The prices of associated simple products do not automatically appear 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
Main Price	When MAP is applied to the main price, the prices of options, bundle items, and associated products (which add or subtract from the main price) appear normally.
Associated Product Price	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.
MSRP	If a product in the cart has the Manufacturer's Suggested Retail Price (MSRP) specified, the price is not crossed-out.
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 appears 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

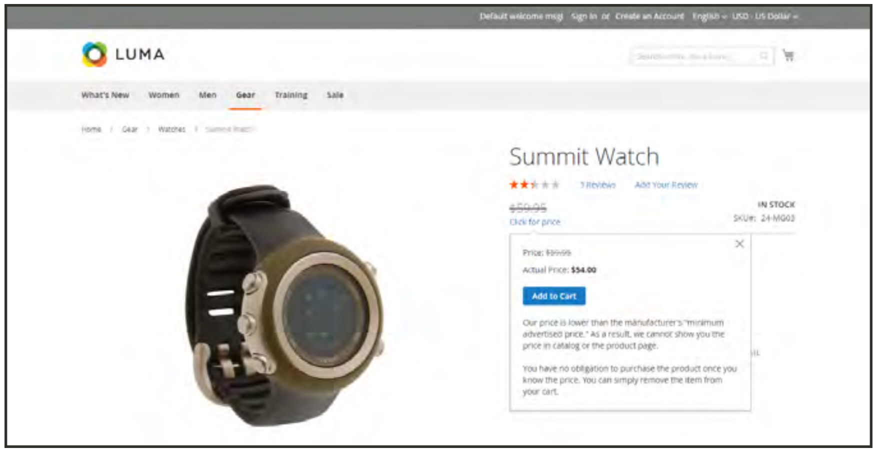
Your store's MAP settings can be applied to all products in your catalog, or configured for specific products. When Minimum Advertised Price is enabled globally, all product prices in the storefront are hidden from view. There are a variety of configuration options that you can use to remain in compliance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



Actual Price Appears "On Gesture"

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

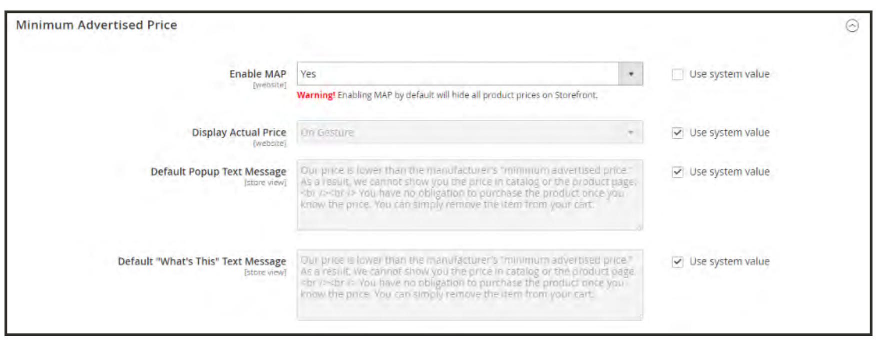
When MAP is enabled, the product-level MAP settings become available. You can apply MAP to an individual product by entering the MSRP, and choosing how you want the actual price to appear in the store. Product-level MAP settings override the global MAP settings.



Click for Price

To configure MAP:

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



Minimum Advertised Price

Method 1: Configure MAP for All Products:

1. To determine when and where you want the actual price to be visible to customers, do the following:

   a. To change the default value, clear the **Use system value** checkbox.

   b. Set **Display Actual Price** to one of the following:

   - In Cart
   - Before Order Confirmation
   - On Gesture (on click)

2. Enter the text that you want to appear in the **Default Popup Text Message**.

3. Enter any additional explanation that you want to appear in the **Default "What's This" Text Message**.

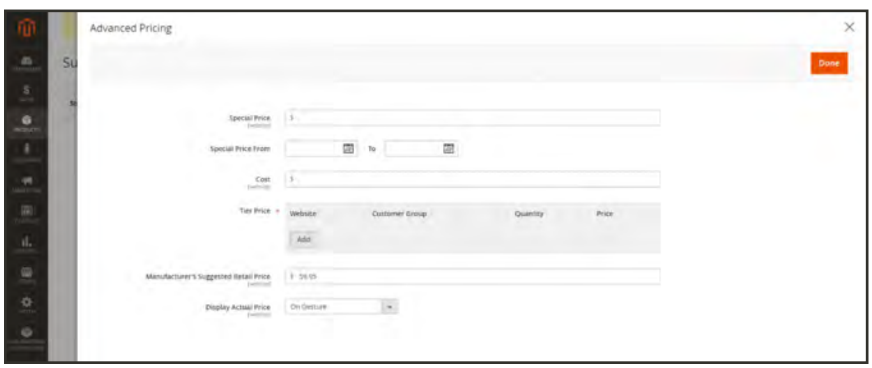
4. When complete, tap **Save Config** .

Method 2: Configure MAP for a Single Product

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

2. Open the product in **Edit** mode.

3. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**. Then, do the following:



Manufacturer's Suggested Retail Price

a. Enter the **Manufacturer's Suggested Retail Price**.

In this example, the product price is $54.00, and the MSRP is 59.95.

b. Set **Display Actual Price** to one of the following:

Use config	(Default) Applies the MAP configuration setting.
On Gesture	Displays the actual product price in a popup when the customer clicks the “Click for price” or “What's this?” link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.

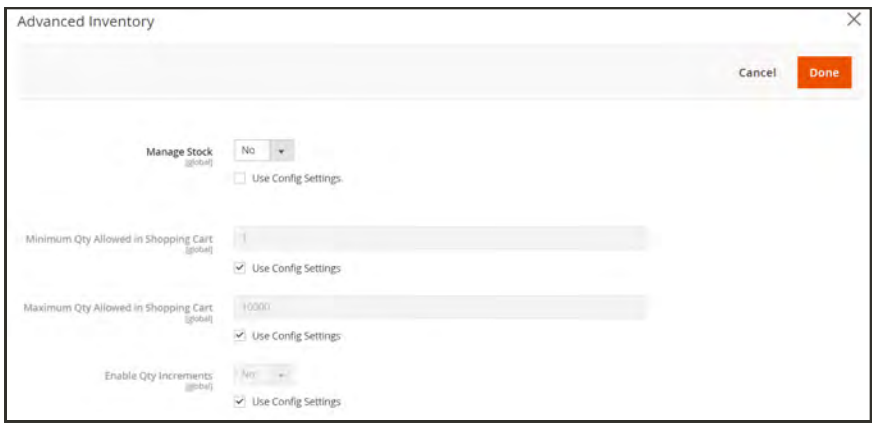
> The Manufacturer's Suggested Retail Price and Display Actual Price fields appear only when Minimum Advertised Price is enabled in the configuration.

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

CHAPTER 15:

Managing Inventory

Each product in your catalog has both a short and long version of the Advanced Inventory options, depending on whether you want to manage stock for the product. The long form appears when Manage Stock is set to "Yes." The initial values reflect the default Product Stock Options set in the configuration.



Advanced Inventory (Short Form)

Stock Management Methods

Method 1: Without Stock Management

1. Open the product in **Edit** mode.
2. Under the Quantity field, click **Advanced Inventory**.

   For any field that you want to edit, clear the **Use Config Settings** checkbox to make the field available.
3. Set **Manage Stock** to “No.”
4. Enter the **Minimum Qty Allowed in Shopping Cart**.
5. Enter the **Maximum Qty Allowed in Shopping Cart**.
6. If you want to sell by quantity increment, do the following:
   a. Set **Enable Qty Increments** to “Yes.”
   b. In the **Qty Increments** field, enter the number of products that must be purchased in an incremental step. For example, if you enter 6, the customer must purchase the product in quantities of 6, 12, 18, and so on.

Quantity Increments

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

Field Descriptions

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

   For any field that you want to edit, clear the **Use Config Settings** checkbox to make the field available.
3. Set **Manage Stock** to “Yes.” Then, do the following:
   a. Enter the **Qty** currently in stock.
   b. Enter the **Out-of-Stock Threshold**.
   c. Enter the **Minimum Qty Allowed in Shopping Cart**.
   d. Enter the **Maximum Qty Allowed in Shopping Cart**.
4. If the quantity is a decimal value, do the following:
   a. Set **Qty Uses Decimals** to “Yes”.
   b. If the quantity purchased can be shipping in separate boxes, set **Allow Multiple Boxes for Shipping** to “Yes”.
5. Set **Backorders** to one of the following:

- No Backorders
- Allow Qty Below 0
- Allow Qty Below 0 and Notify Customer

6. In the **Notify for Quantity Below** field, enter the stock level that triggers a Quantity Below notification.

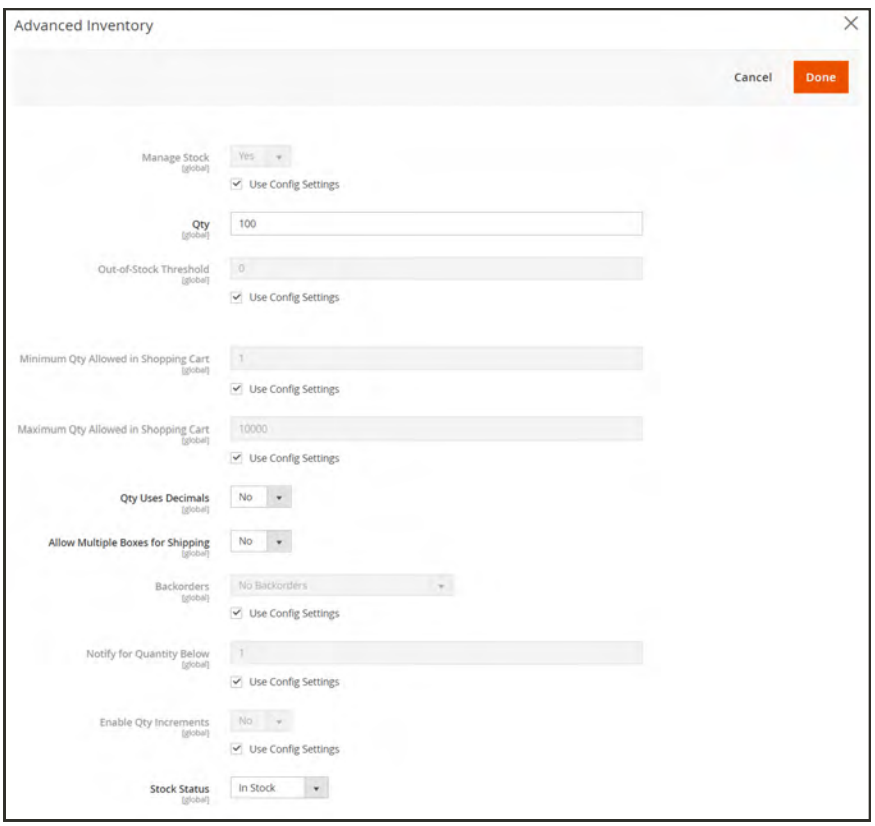
7. To sell the product in quantity increments, do the following:

   a. Set **Enable Qty Increments** to "Yes."

   b. In the **Qty Increments** field, enter the number of products that must be purchased in an incremental step. For example, if you enter 6, the customer must purchase the product in quantities of 6, 12, 18, and so on.

8. If the product is currently in stock, set **Stock Status** to "In Stock."

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



Advanced Inventory (Long Form)

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.
Out-of-Stock Threshold	Global	Determines the stock level at which a product is considered to be out of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Qty Uses Decimals	Global	Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options: Yes — Permits values to be entered as decimals, rather than whole numbers, which is suitable for products sold by weight, volume or length. No — Requires quantity values to be entered as whole numbers.
Allow Multiple Boxes for Shipping	Global	Determines if parts of the product can be shipped separately. Options: Yes / No
Backorders	Global	Determines how backorders are managed. Backorders do not change the processing status of the order. Funds are still authorized or captured immediately when the order is placed, regardless of whether the product is in stock. Products are shipped as they become available. Options:

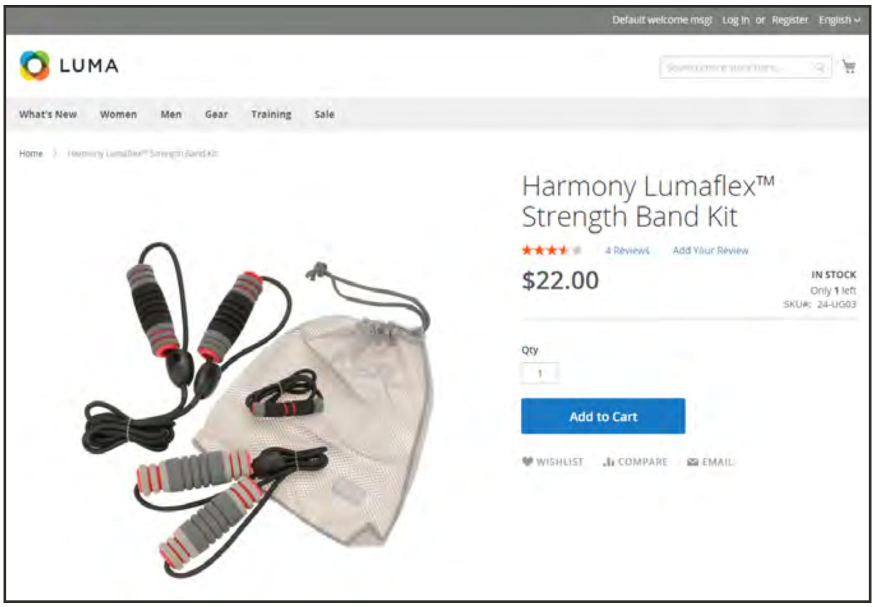
Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION	
		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 Status	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 canceled, **Set Items' Status to be in Stock When Order in Canceled** to "Yes."

   b. To adjust the quantity on hand when an order is placed, set **Decrease Stock When Order is Placed** to "Yes."

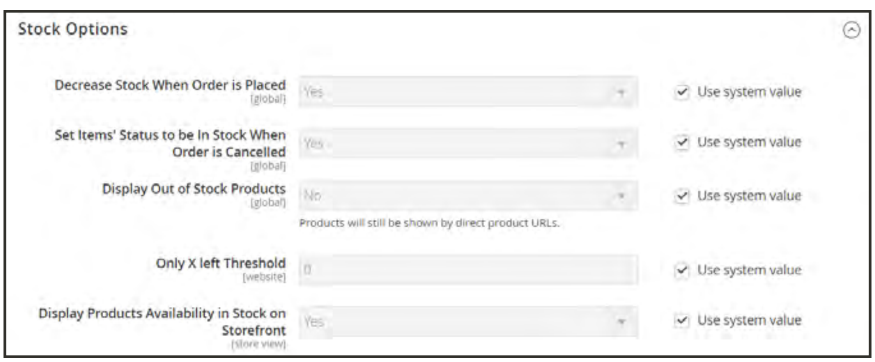
   c. Set **Display Out of Stock Products** to "Yes" to continue to display products in the catalog that are no longer in stock.

   If price alerts are enabled, customers can sign up to be notified when the product is back in stock.

   d. To display the message, "Only x left," enter the number in the **Display X left Threshold** field.

   The message begins to appear when the quantity in stock reaches the threshold. For example, if set to 3, the message "Only 3 left" appears when the quantity in stock reaches 3. The message adjusts to reflect the quantity in stock, until the quantity reaches zero.

   e. To display an "In Stock" or "Out of Stock" message on the product page, set **Display Products Availability In Stock on Storefront** to "Yes."



Stock Options

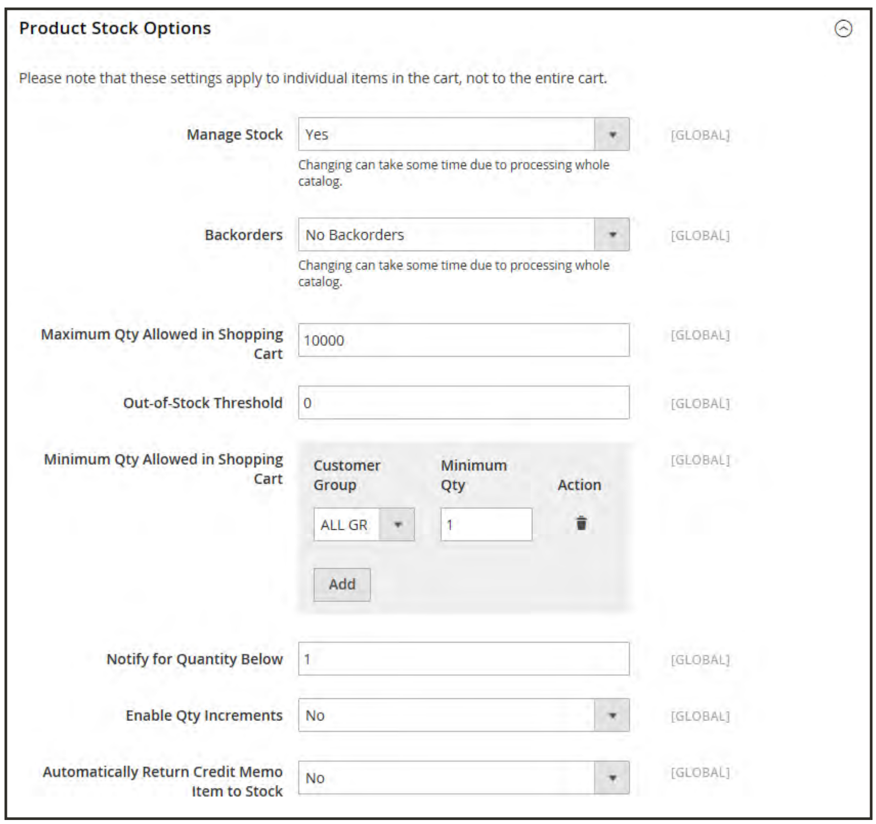
4. When complete, tap **Save Config**.

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.

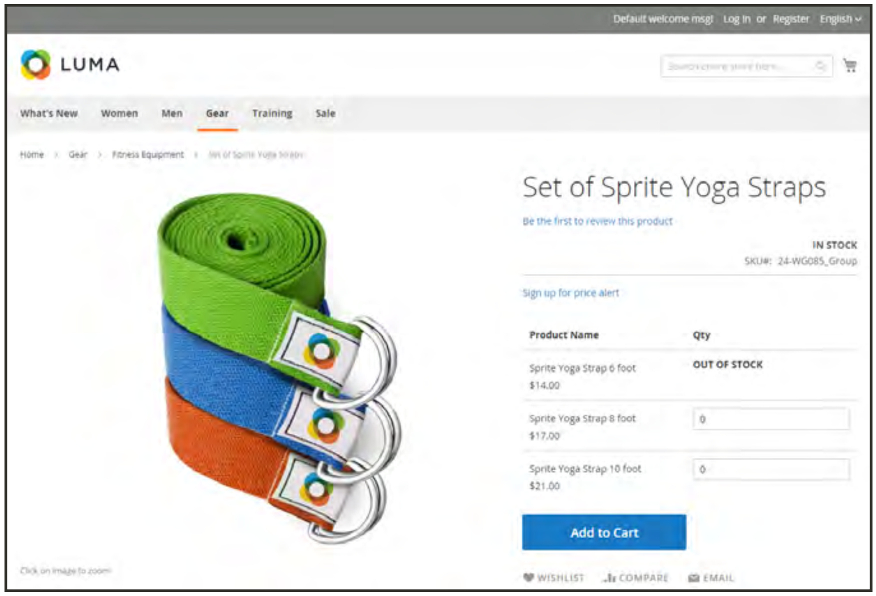
g. To activate quantity increments for the product, set **Enable Qty Increments** to “Yes.” Then in the **Qty Increments** field, enter the number of the items that must be purchased to meet the requirement. For example, an item that is sold in increments of 6 can be purchased in quantities of 6, 12,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



Grouped Product with "Out of Stock" Message

Product Page Stock Messages

There are several variations of messaging available for the product page, depending on the combination of Manage Stock and Stock Availability settings.

Example 1: Show Availability Message

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

STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	Yes	
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.

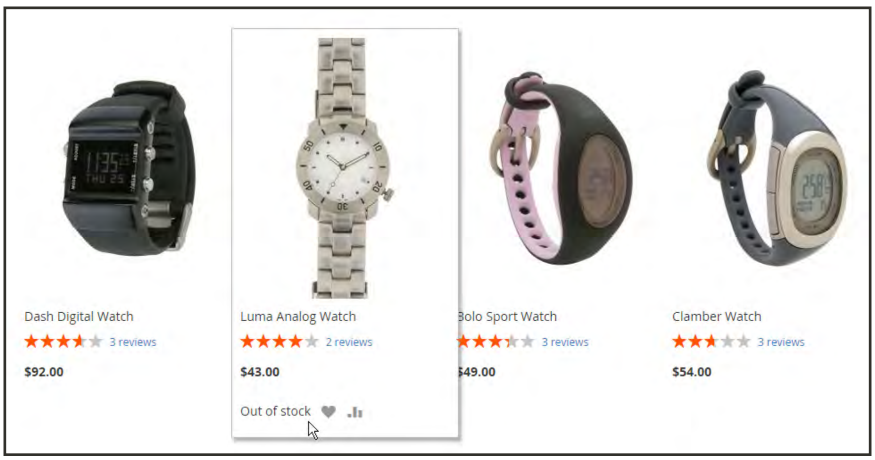
STOCK OPTIONS		MESSAGE
Display product availability in stock in the frontend:	No	
Product Inventory		
Manage Stock	Yes	
Stock Availability	In Stock	None
	Out of Stock	None

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

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

Catalog Page Stock Messages

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



"Out of Stock" Message on Category Page

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

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

STOCK OPTIONS		MESSAGE
Display Out of Stock Products	Yes	
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	

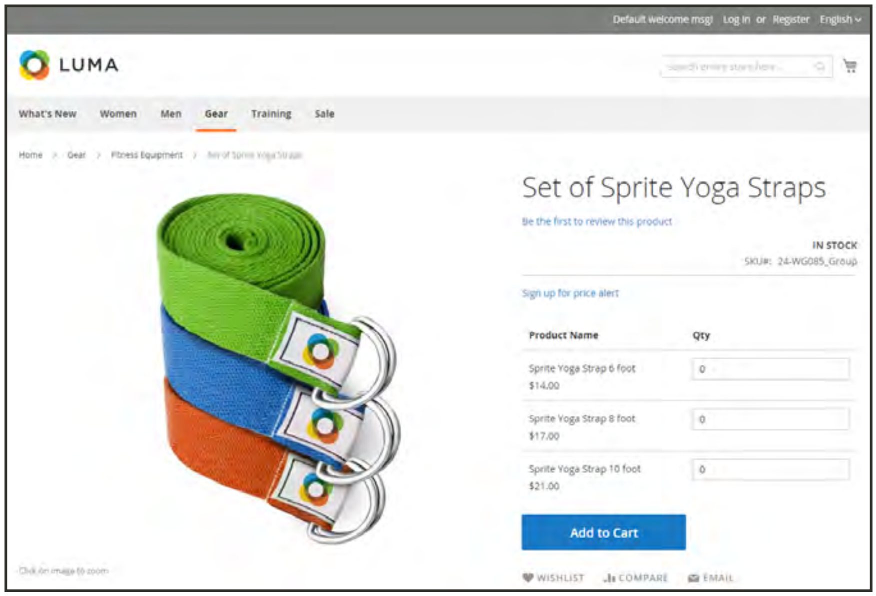
Example 3: Hide Product Until Back in Stock

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.

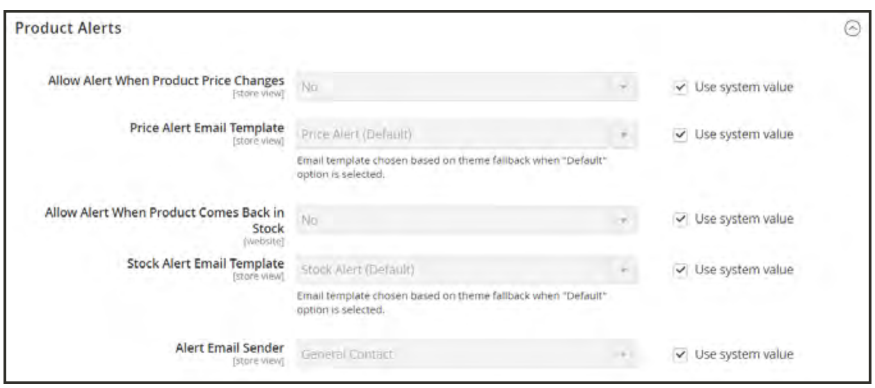
The in-stock alert creates a link called “Sign up to get notified when this product is back in stock” for every product that is out of stock. Customers can click the link to subscribe to the alert. When the product is back in stock, customers receive email notification that the product is available. 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 **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Product Alerts Run Settings** section, and do the following:
   a. To determine how often product alerts are sent, set **Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthly

   b. To determine the time of day product alerts are sent, set **Start Time** to the hour, minute, and second.

   c. In the **Error Email Recipient** field, enter the email of the person to be contacted if an error occurs.

   d. In the **Error Email Sender** field, select the store identity that appears as the sender of the error notification.

   e. Set **Error Email Template** to the transactional email template to be used for the error notification.
4. When complete, tap **Save Config**.

CHAPTER 16:

Catalog Images and Video

Using high-quality images of consistent proportion gives your catalog a professional look with commercial appeal. If you have a large catalog with several images per product, you can easily have hundreds, if not thousands of product images to manage. Before you get started, establish a naming convention for your image files, and organize them so you can find the originals if you ever need them.

Product Images

A single product image is rendered in different sizes throughout the catalog. The display size of the image container on the page is defined in the style sheet of your theme. However, where the image appears in your store is determined by the role that is assigned to the image. The main product image, or “base” image, must be large enough to produce the magnification that is needed for zoom. In addition to the main image, a smaller version of the same image might appear in product listings, or as a thumbnail in the shopping cart. You can upload an image in the largest size that is needed, and let Magento render the sizes needed for each use. The same image can be used for all roles, or a different image can be assigned to each role. By default, the first image that is uploaded is assigned to all three roles.

Uploading Product Images

For each product, you can upload multiple images, rearrange their order mages, and control how each image is used. If you have a large quantity of images to manage, you might prefer to import them as a batch, rather than upload each one individually. To learn more, see: Importing Product Images.

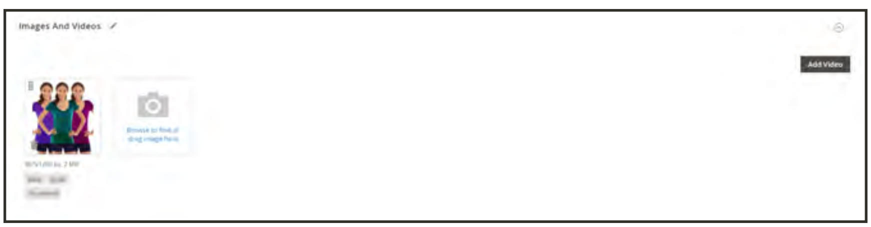
To manage images:

1. Open the product in edit mode.
2. To work with a specific store view, set the **Store View** chooser in the upper-left corner to the applicable view.
3. Scroll down and expand the **Images and Videos** section. Then, do any of the following:

Upload an Image

To upload an image, do one of the following:

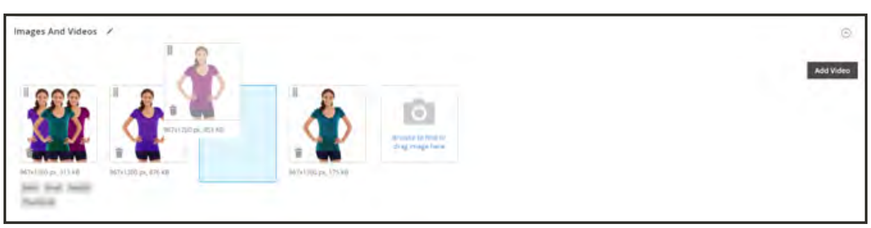
- Drag an image from your desktop, and drop it on the **camera** ( ) tile in the Images box.
- In the Images box, tap the **camera** ( ) tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.



Upload or Drag and Drop

Rearrange Images

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



Change Order

Delete an Image

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

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

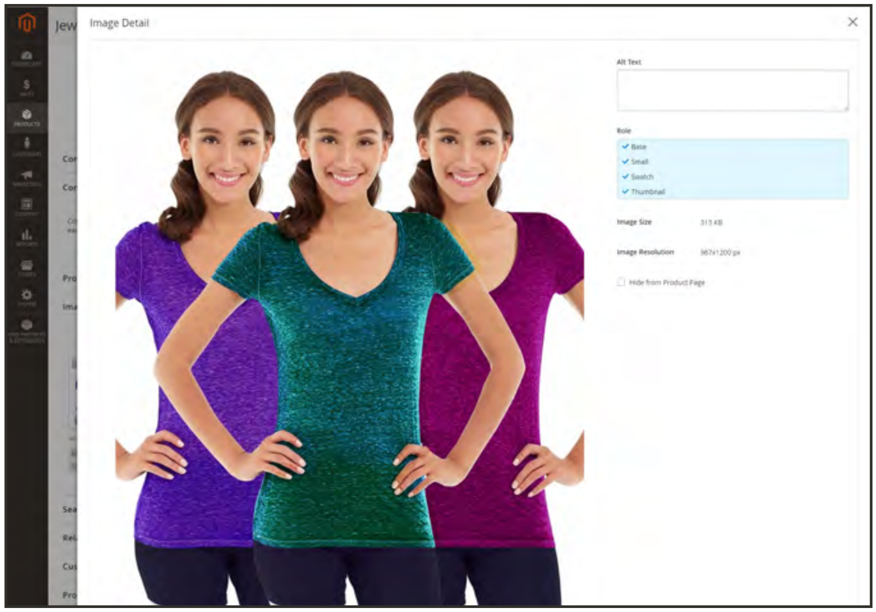


Image Detail View

Enter Alt Text

Image Alt text is referenced by screen readers to improve web accessibility, and by search engines when indexing the site. Some browsers display the Alt text on mouseover. Alt text can be several words long, and include carefully selected key words.

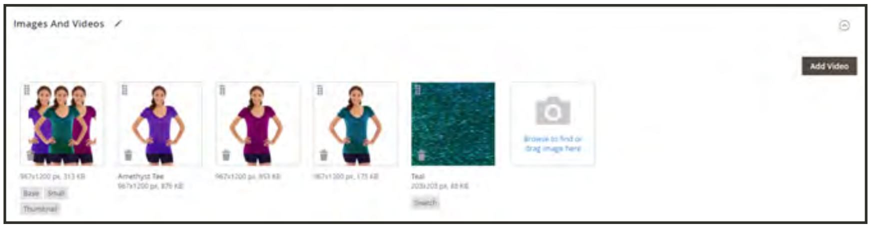
In the **Alt Text** box, enter a brief description of the image.

Assign Roles

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

1. Tap an image tile to open the image in detail view.
2. In the **Role** box, choose the role that you want to assign to the image.

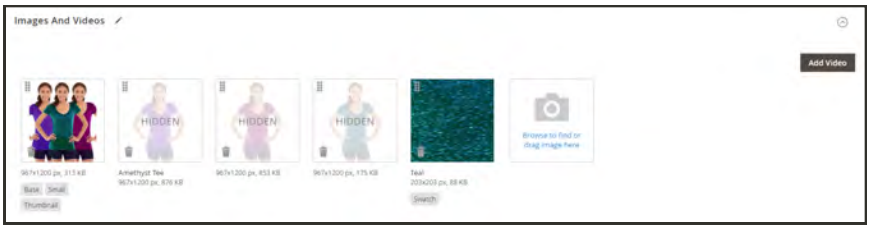
   When you return to the Images and Videos section, the currently assigned roles appear below each image.



Assigned Roles

Hide Image

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



Hidden Images

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

6. 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. Depending on the level of zoom that you want to achieve, the base image should be two or three times the size of the container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)
Swatch	A swatch can be used to illustrate the color, pattern, or texture. Example size: 50 x 50 pixels

Adding Product Video

To add product video, you must first obtain an API Key from your Google account, and enter it in the configuration of your store. Then, you can link to the video from the product.

Step 1: Get Your YouTube API Key

1. Log in to your Google account, and visit the Google Developers Console. Then, do the following:

   a. Under Use Google APIs, click **Enable and manage APIs**.

   b. In the panel on the left choose **Credentials**. Expand the Add Credentials menu, and choose **API key**.

   c. When prompted to create a new key, choose **Server key**. Enter a name for the key, and tap **Create**.

2. Wait a few moments while the key is generated. Then, copy the key to the clipboard.

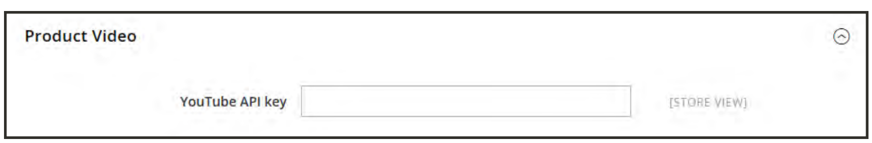
   In the next step, you will paste the key into your store's configuration.

Step 2: Configure Magento

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

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

3. Expand the **Product Video** section. Then, paste your **YouTube API key**.



Product Video

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

5. When prompted, refresh the cache.

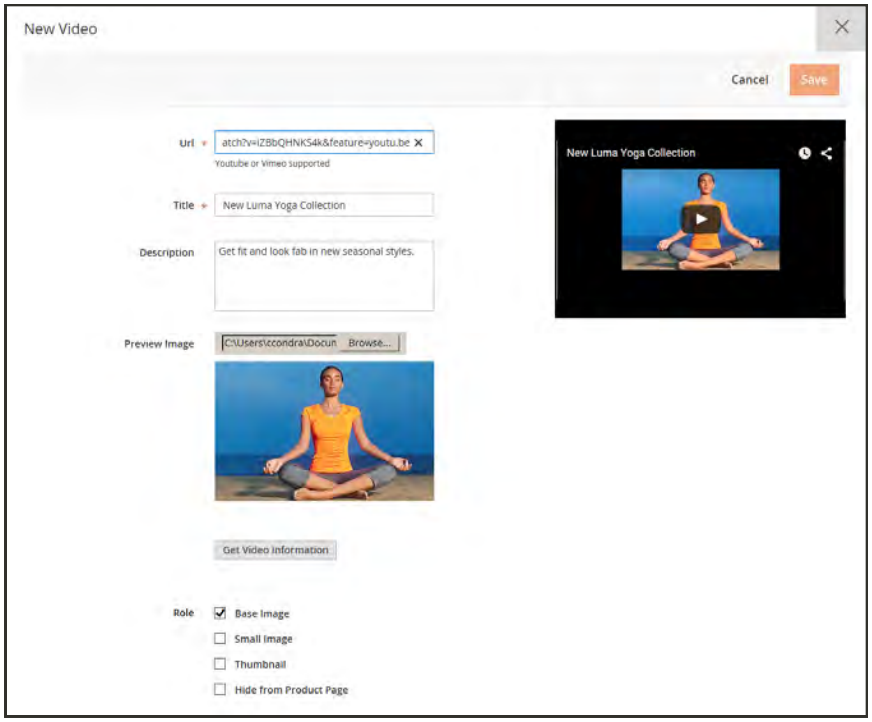
Step 3: Link to the Video

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

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

Add Video

2. Enter the **URL** of the YouTube or Vimeo video.
3. Enter the **Title** and **Description** of the video.
4. To upload a **Preview Image**, browse to the image and select the file.
5. If you prefer to use the video meta data, tap **Get Video Information**.
6. To determine how the video is used in the store, mark the checkbox of each **Role** that applies:
   - Base Image
   - Small Image
   - Swatch Image
   - Thumbnail
   - Hide from Product Page
7. When complete, tap **Save**.



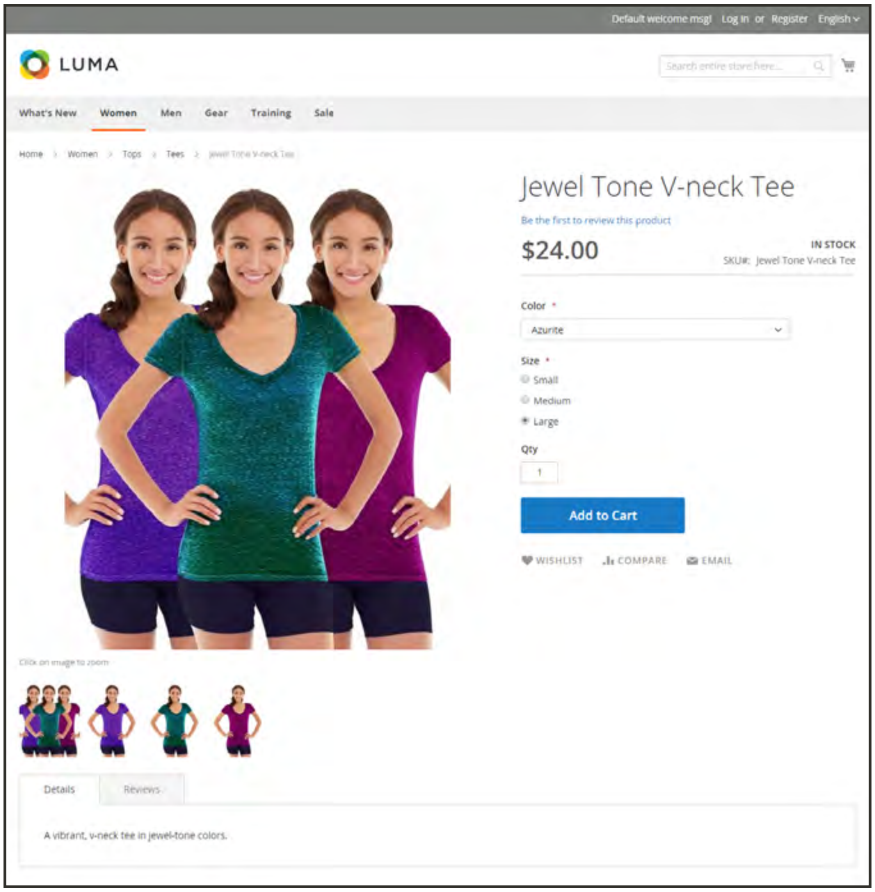
New Video

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

Media Gallery

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



Media Gallery

Image Zoom

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

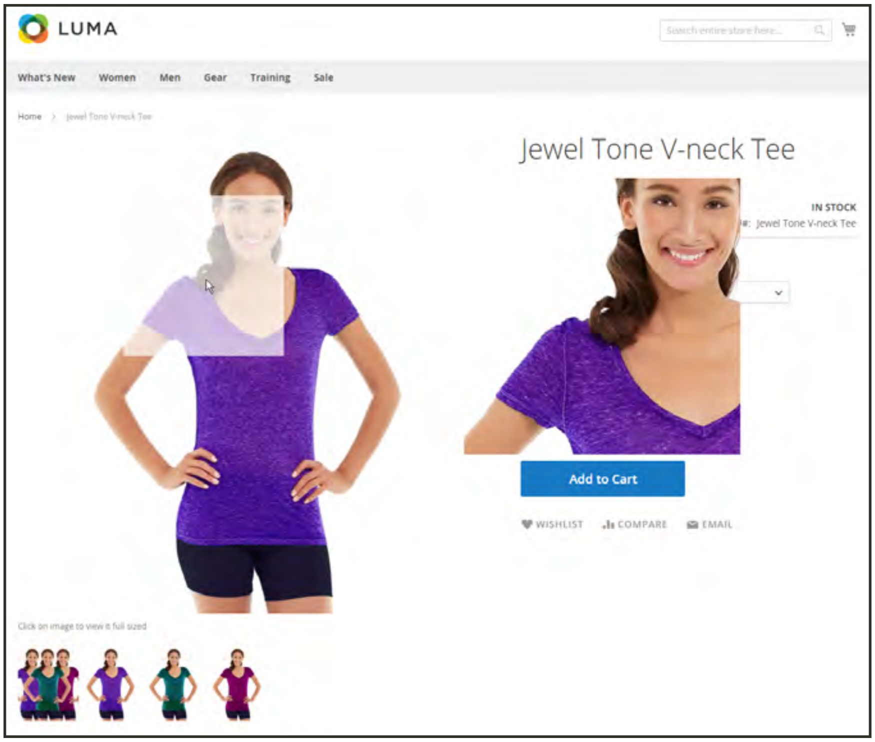


Image Zoom

Light Boxes and Sliders

There are many third-party light boxes and sliders that you can use to enhance the presentation of your product images. Look for extensions in Magento Marketplace.

Placeholders

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

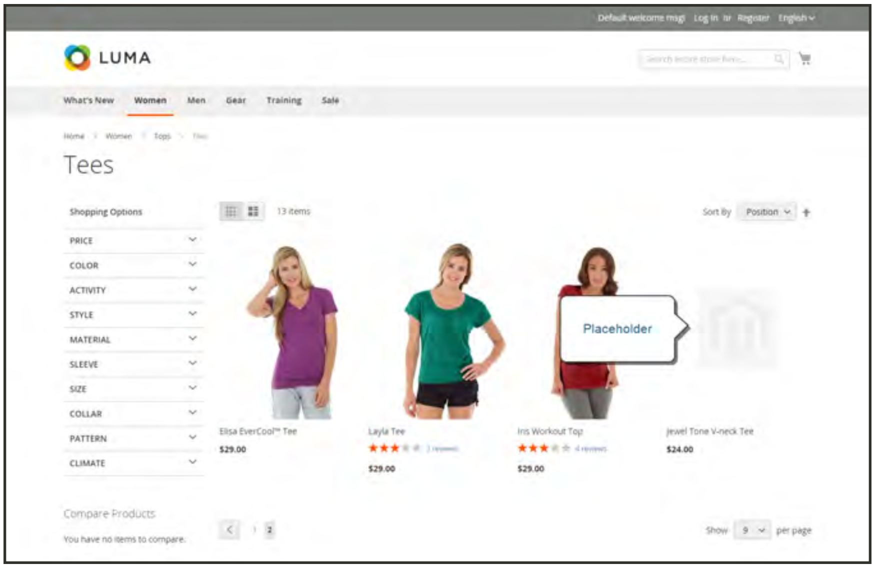


Image Placeholder

To upload placeholder images:

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

Product Image Placeholders

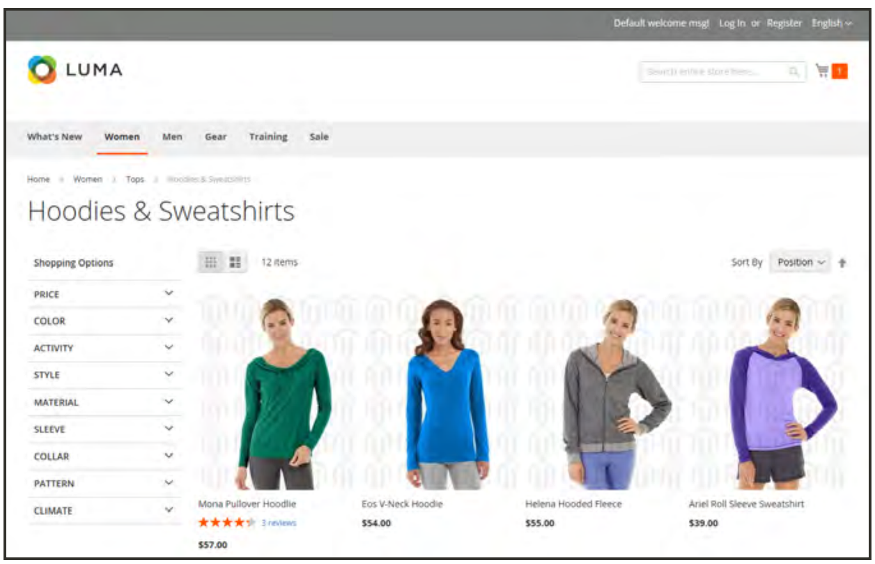
5. When complete, tap **Save**.

Watermarks

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

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

Size:	50x50
Opacity:	5
Position:	Tile



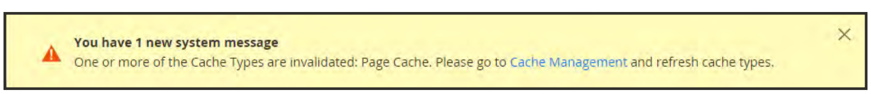
Tiled Watermark

To add watermarks to product images:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand the **Product Image Watermarks** section.
4. Complete the **Base**, **Thumbnail**, **Small**, and **Swatch Image** image settings as follows. The fields in each section are the same.
   a. Enter the **Image Opacity** as a percentage. For example: 40
   b. Enter the **Image Size**, in pixels. For example: 200 x 200
   c. Tap **Upload**, and choose the image file that you want to use.
   d. Set **Image Position** to determine where the watermark appears.

Product Image Watermarks - Base

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



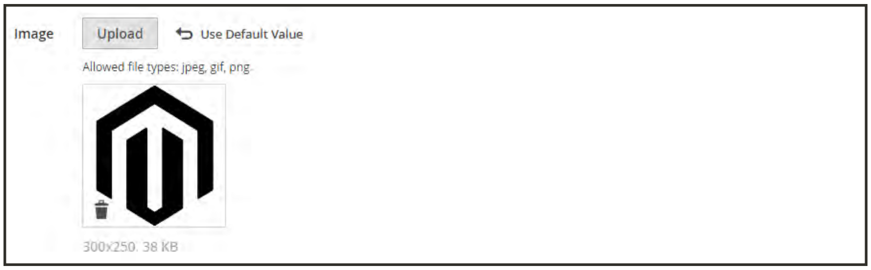
Refresh Cache

To restore the default value:

Tap **Use Default Value** ( ).

To delete a watermark:

1. In the lower-left corner of the image, tap **Delete** (🗑).



Delete Watermark

2. Tap **Save Config**.

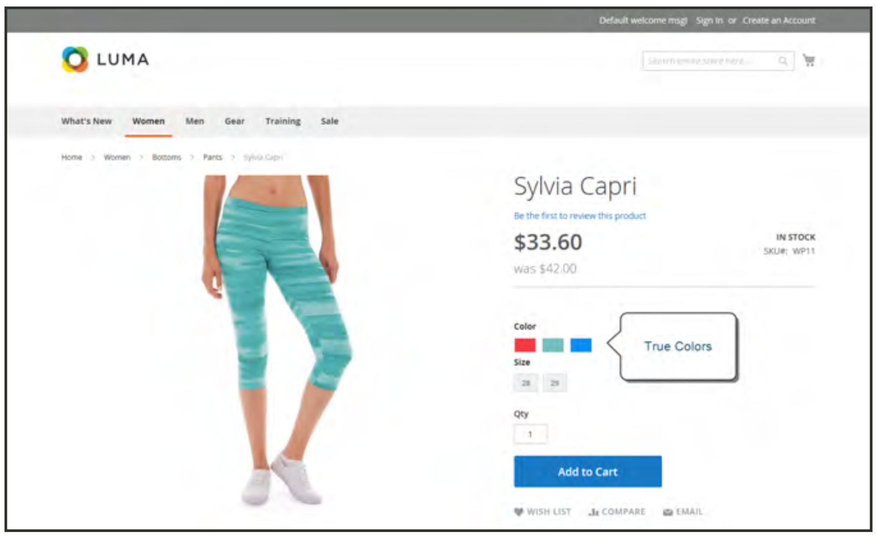
3. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.

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

Swatches

Customers have high expectations when it comes to color, and it is crucial that product descriptions accurately represent each available color, pattern, or texture. For example, the capris in the illustration below are not simply available in red, green, and blue. Rather, they are available only in very specific shades of red, green, and blue, which are probably unique to this product.

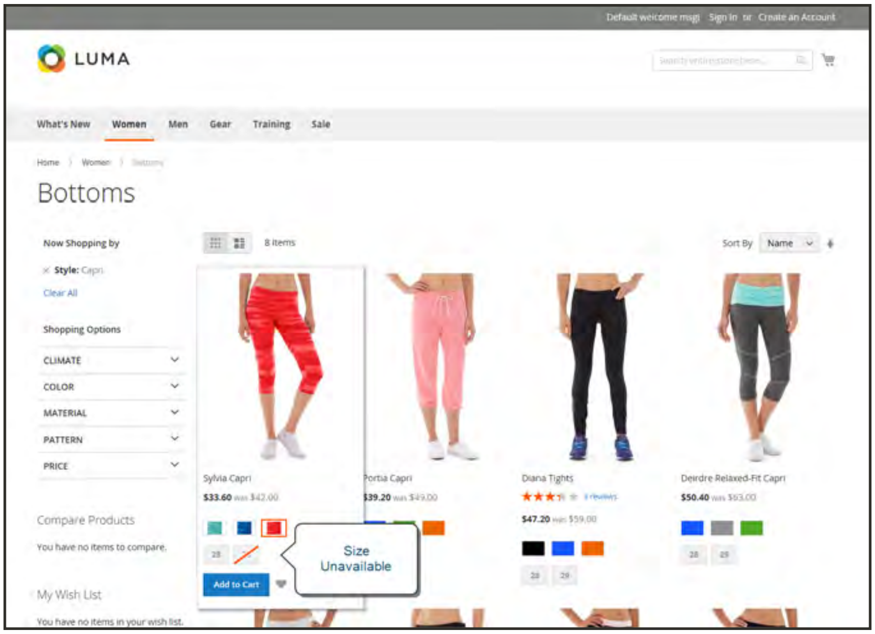
For configurable products, color can be indicated by a visual swatch, text swatch, or a drop-down input control. Swatches can be used on the product page, in product listings, and in layered navigation. On the product page, swatches are synchronized to display the corresponding product image when the swatch is chosen. When chosen, the corresponding value appears in the input field, and the swatch is outlined as the current selection.



Swatches on Product Page

Text-Based Swatches

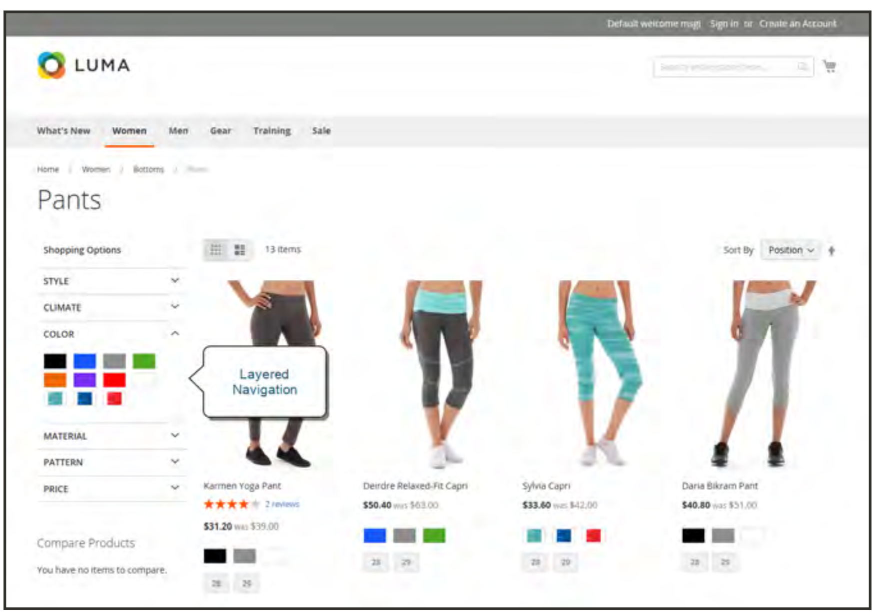
If an image isn't available for a swatch, the attribute value appears as text. A text-based swatch is like a button with a text label, and behaves in the same way as a swatch with an image. When text-based swatches are used to show the available sizes, any size that is not available is crossed out.



Text-Based Swatches for Size

Swatches in Layered Navigation

Swatches can also be used in layered navigation, provided that the Use in Layered Navigation property of the `color` attribute is set to "Yes." The following example shows both text-based and color image swatches in layered navigation.



Swatches in Layered Navigation

Creating Swatches

Swatches can be defined as a component of the `color` attribute, or set up locally for a specific product and uploaded as product images.

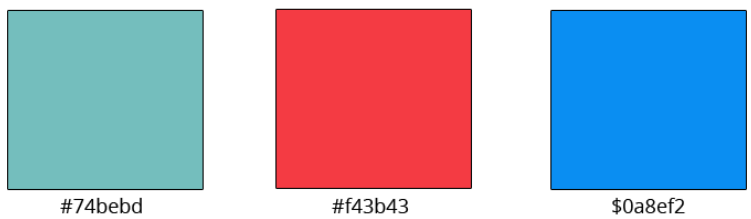
In the following examples, the Sylvia Capris are available in specific values of red, green, and blue. Because the swatches were taken from the product image, each is a true representation of the color. The `color` attribute is used to manage the information for all product colors and swatches.

Step 1: Create the Swatches

Use either of the following methods to create swatches for your products:

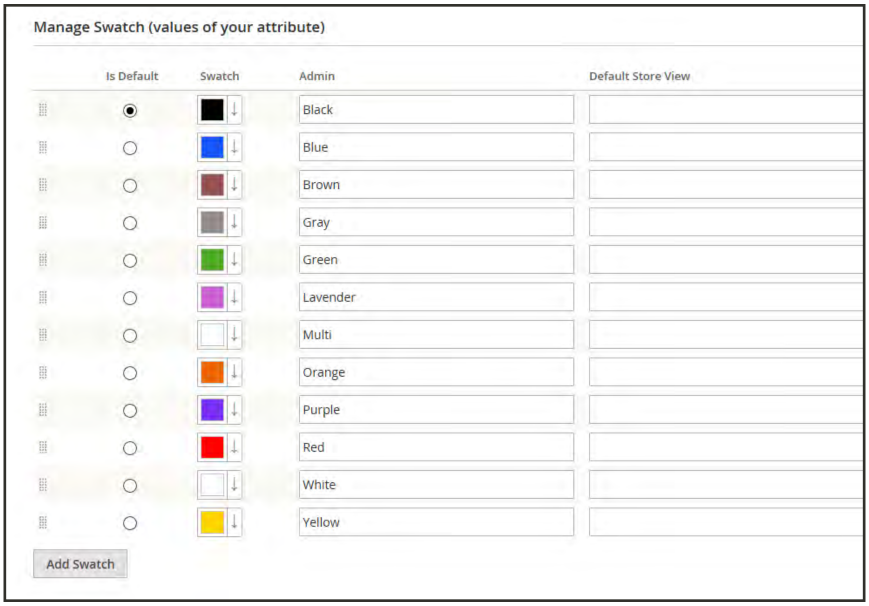
Method 1: Add a Color Swatch

1. To capture the true color of a product, open the image in a photo editor and use the eye dropper tool to identify the exact color. Then, take note of the equivalent hexadecimal value.



Hexadecimal Color Values

2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
3. In the grid, open the **color** attribute in edit mode.
4. Verify that **Catalog Input Type for Store Owner** is set to “Visual Swatch.”
5. Under **Manage Swatch** (values of your attribute), tap **Add Swatch**. Then, do the following:



Manage Swatch Values

a. In the Swatch column, tap the new swatch to display the menu. Then, select **Choose a color**.

Choose a Color

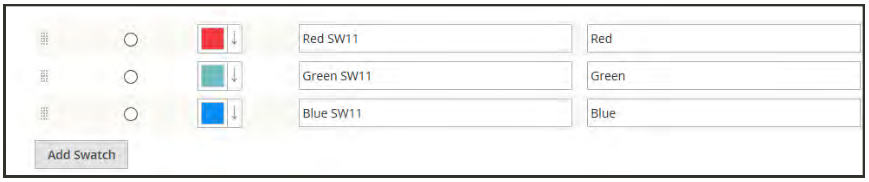
b. In the color picker, place your cursor in the **#** field, and press the **Backspace** key to delete the current value. Then, enter the six-character hexadecimal value of the new color..

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

d. In the Admin column, enter a label to describe the color to the store administrator. Then if applicable, enter the translation of the color for each each language supported. In the following example, we include the SKU for reference in the Admin label because the colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.

e. In the **Is Default** column, select the swatch that is to be the default option.

f. To change the order of the swatches, simply drag each swatch into position.



Swatch Labels

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

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

Method 2: Upload a Swatch Image

1. To capture an image for a swatch, open the product image in a photo editor, and save a square area of the image that depicts the color, pattern, or texture. Then repeat for each variation of the product. The size and dimensions of the swatch is determined by the theme. As a general rule, saving an image as a square helps to preserve the aspect ratio of a pattern.

Swatch Images

2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.

3. In the grid, open the **color** attribute in edit mode.

4. Verify that **Catalog Input Type for Store Owner** is set to "Visual Swatch."

5. Under **Manage Swatch** (values of your attribute), tap **Add Swatch**. Then, do the following:

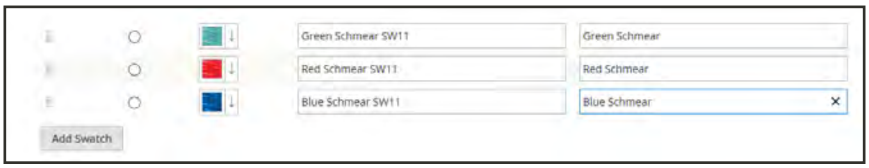
a. In the Swatch column, tap the new swatch to display the menu. Then, choose **Upload a file**.

Upload a File

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

c. Repeat these steps for each swatch image.

d. Enter the labels for the Admin and Storefront. In this example, we include the SKU in the admin label for reference because these colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.



Enter Labels

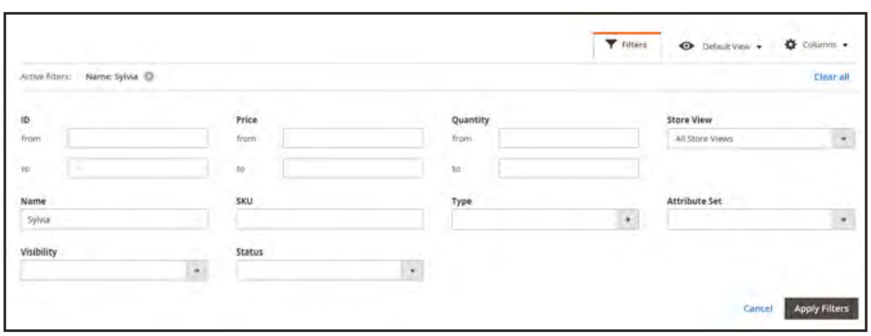
6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.

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

Step 2: Update Your Products

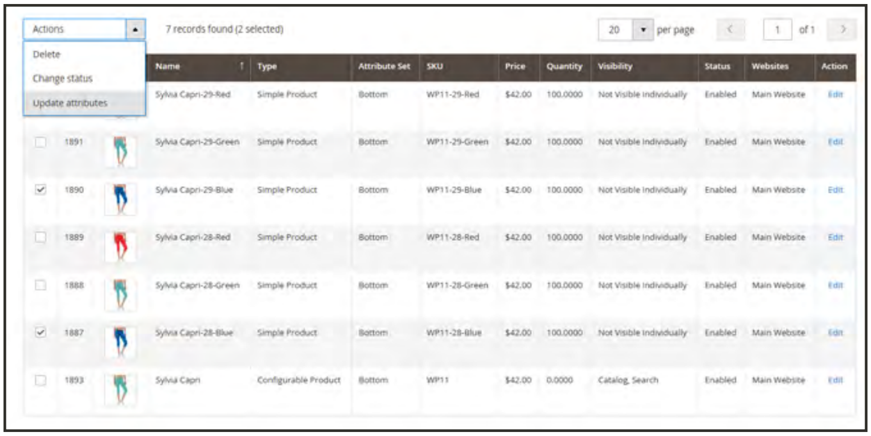
1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.

2. **Filter** the list by Name or SKU to include only the applicable products. The following example filters the list on a partial product name.



Filters

3. In the grid, mark the checkbox of each product to which the swatch applies. In this example, all blue capris are selected. Then, set the **Actions** control to “Update Attributes.”



Update Attributes

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

Change

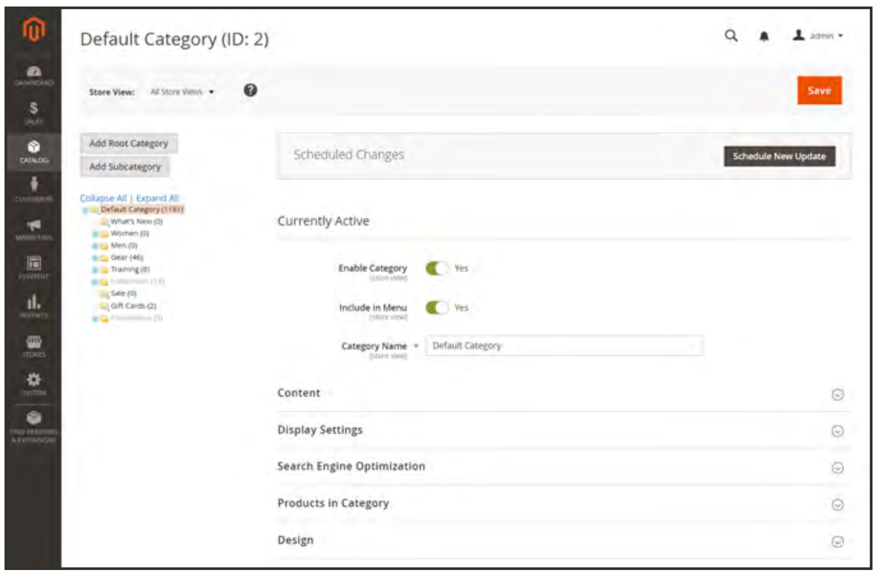
5. Choose the swatch that applies to the selected products, and tap **Save**. Then when prompted, refresh the cache.

Swatch in Storefront

CHAPTER 17:

Categories

Before you add products to your catalog, you need to establish the basic category structure of your catalog. Every product must be assigned to at least one category. Categories are usually created in advance, before products are added to the catalog. However, you can also add categories “on the fly” while creating a product. The category structure of the catalog is reflected by the main menu — or top navigation — of the store.



Category Tree

Controls

FIELD	DESCRIPTION
Add Root Category	Creates a new root category.
Add Subcategory	Adds a subcategory below the current category or subcategory.
Collapse All / Expand All	Either collapses or expands the category tree.
Delete	Removes the current category or subcategory from the tree.
Save	Saves any changes made to the category.

Best Practices for Product Categories

Category Structure

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

Business Rules and Automation

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

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

```
[Category:  All Products/Shirts/Father’s Day/Polos/Sale]
```

```
[Category Path: Men/Shirts/Polos]
```

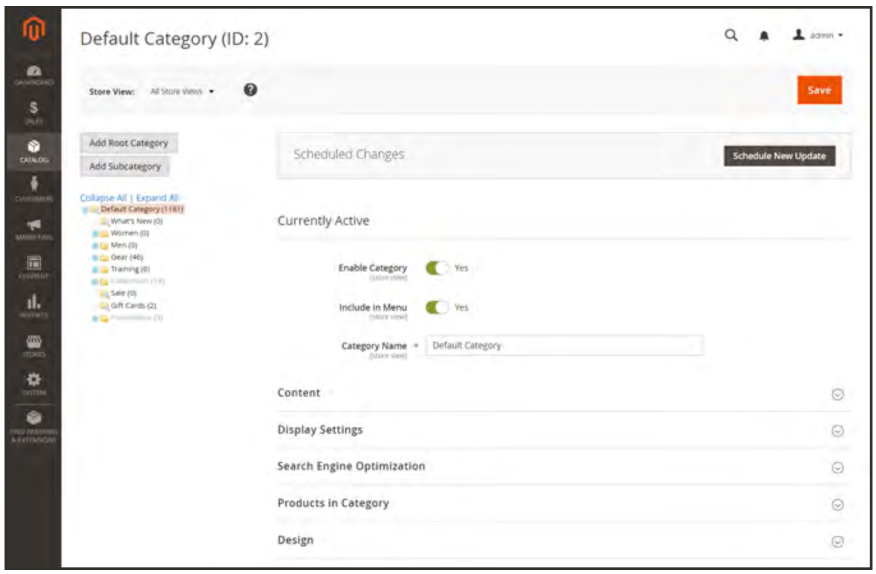
```
[Child Category: Polos]
```

It’s important to clearly define categorical relationships such as parent category, sub category, category path, and any associated keywords and attributes such as availability, sale price, brand, size and color.

Creating Categories

The category structure of your catalog is like an upside-down tree, with the root at the top. Each section of the tree can be expanded and collapsed. Any disabled or hidden categories are grayed out. The first level of categories below the root typically appear as options in the main menu. You can create as many additional subcategories as needed, according to themaximum menu depth that is set in the configuration. Categories can be dragged and dropped to other locations in the tree. The category ID number appears in parentheses after the category name at the top of the page.

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



Category Tree

Process Overview:

Step 1: Create a Category

Step 2: Complete the Basic Information

Step 3: Complete the Category Content

Step 4: Complete the Display Settings

Step 5: Complete the Search Engine Optimization Settings

Step 6: Choose the Products in Category

Step 7: Set Category Permissions

Step 8: Complete the Design Settings

Step 1: Create a Category

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. Set **Store View** to determine where the new category is to be available.
3. In the category tree, tap the parent category of the new category. The parent is one level above the new category.

   If you're starting from the beginning without any data, there might be only two categories in the list: "Default Category," which is the root, and an "Example Category."
4. Tap **Add Subcategory**.

Step 2: Complete the Basic Information

1. If you want the category to be immediately available in the store, set **Enable Category** to the "Yes" position.
2. To include the category in the top navigation, set **Include in Menu** to the "Yes" position.
3. Enter the **Category Name**.

Basic Information

4. Tap **Save** and continue.

Step 3: Complete the Category Content

1. Expand the **Content** section.
2. To display a **Category Image** at the top of the page, tap **Upload**. Then, choose the image that you want to represent the category.
3. In the **Description** box, enter the text that you want to appear on the category landing page. Then, format the text as needed. To learn more, see: Using the Editor.
4. To include a content block on the category landing page, choose the **CMS Block** that you want to appear.
5. Tap **Save** and continue.

Content

Step 4: Complete the Display Settings

1. Expand the **Display Settings** section.

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

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

3. If you want the category page to include the “Filter by Attribute” section of layered navigation, set **Anchor** to the “Yes” position.

4. To change the **Available Product Listing Sort By** options, do the following:

   a. Clear the **Use All** checkbox.

   b. Select one or more of the available values to be available for customers to sort the list. By default, all available values are included. For example, the values might include:

      - Position
      - Product Name
      - Price

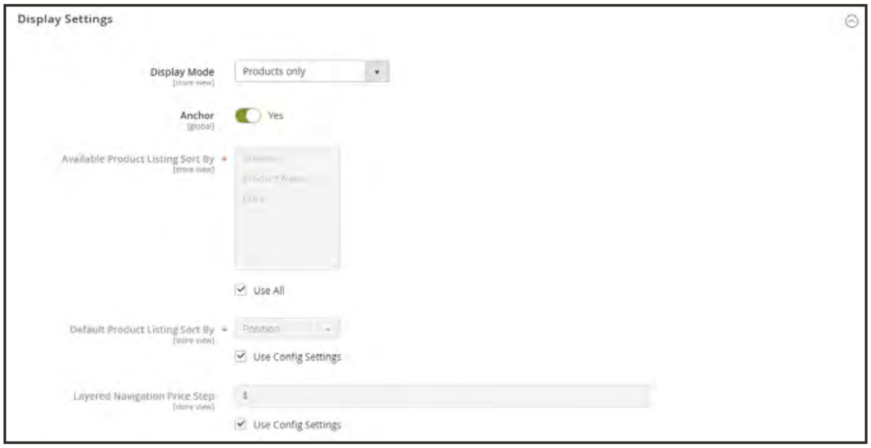
5. To set the default sort order for the category, choose the **Default Product Listing Sort By** value.

6. To change the default layered navigation price step setting, do the following:

   a. Clear the **Use Config Settings** checkbox.

   b. Enter the value to be used as an incremental price step for layered navigation.

7. Tap **Save** and continue.



Display Settings

Step 5: Complete the Search Engine Optimization Settings

1. Expand the **Search Engine Optimization Settings** section.
2. Complete the following meta data for the category:
   - Meta Title
   - Meta Keywords
   - Meta Description

Search Engine Optimization

3. Tap **Save** and continue.

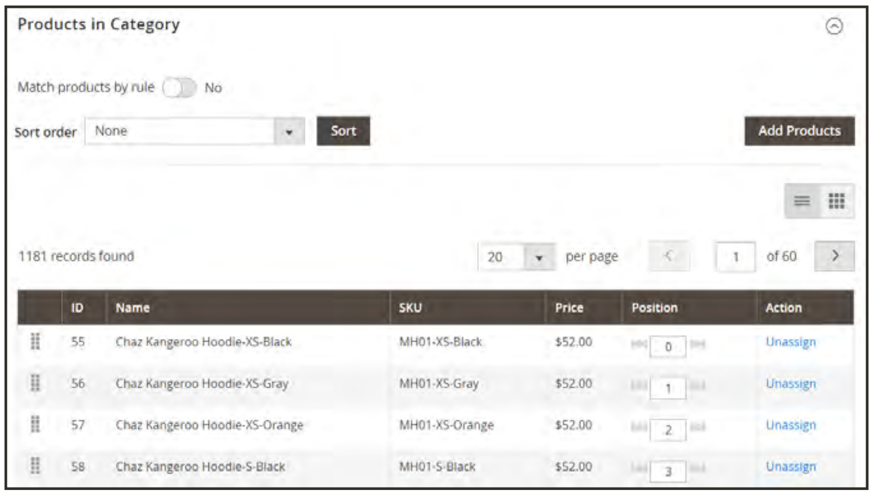
Step 6: Choose the Products in Category

1. Expand the **Products in Category** section. Then, use one of the following methods to add products to the category.

2. Use the filters as needed to find the products.

   To display all records that are not yet included in the category, set the record chooser in the first column to "No." Then, click **Search**.

3. In the first column, mark the checkbox of each product to include in the category.



Selected Products

4. Tap **Save** and continue.

Step 7: Set Category Permissions

1. Expand the **Category Permissions** section. Then, do the following:

   a. For a multisite installation, choose the **Website** where the category permissions apply.

   b. Choose the **Customer Group** or **Shared Catalog** where the category permissions apply.

   c. Set the following permissions as needed:

   - Browsing Category
   - Display Product Prices
   - Add to Cart

2. To add another permission rule, tap **New Permission**. Then repeat the process.

Step 8: Complete the Design Settings

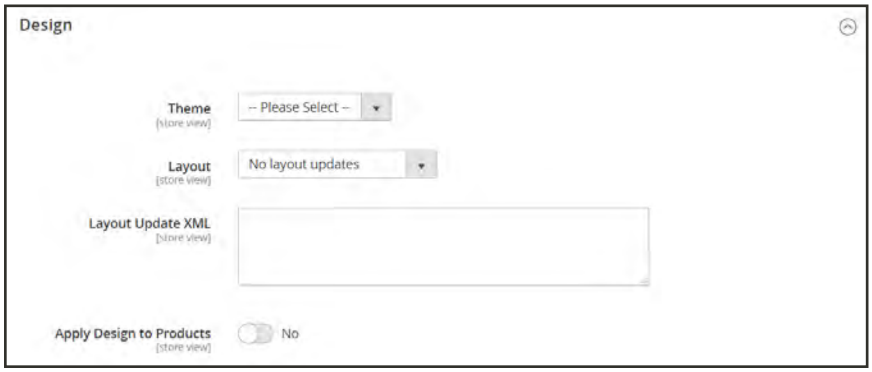
1. Expand the **Design** section. Then, do the following:

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

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

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

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

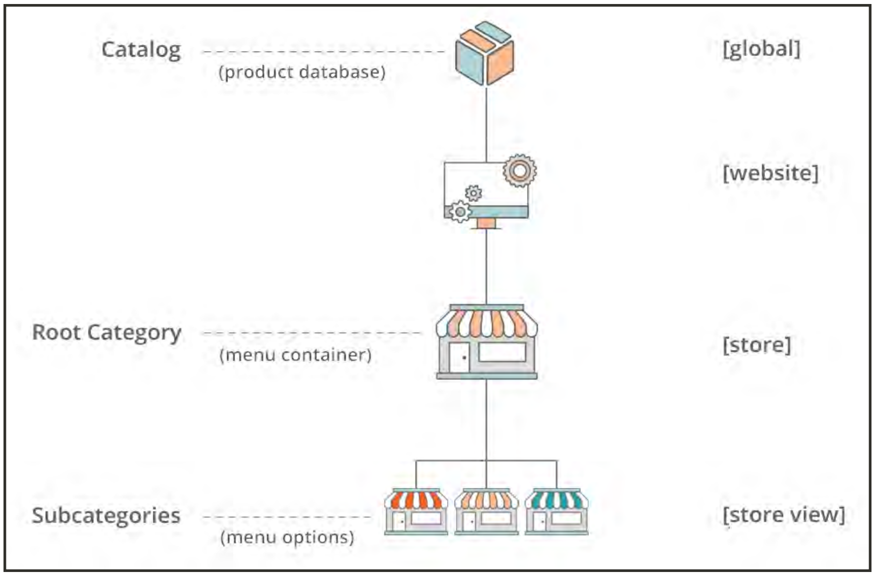


Design

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

Root Categories

The products in the main menu are determined by the root category that is assigned to the store. The root category is basically a container for the main menu in the category tree. You can create a root category with an entirely new set of products, or copy products from an existing root category. The root category can be assigned to the current store, or to any other store in the same website.



Scope of Main Menu

From the Admin, the category structure is like an upside-down tree, with the root on top. The root has a name, but no URL key, and does not appear in the top navigation of the store. All other categories in the menu are nested below the root. Because the root category is the highest level of the catalog, your store can have only one root category active at a time. You can, however, create additional root categories for alternate catalog structures, different stores, and views.

The following example shows how to create a new root category and assign it to a different store.

Process Overview:

Step 1: Create a New Root Category

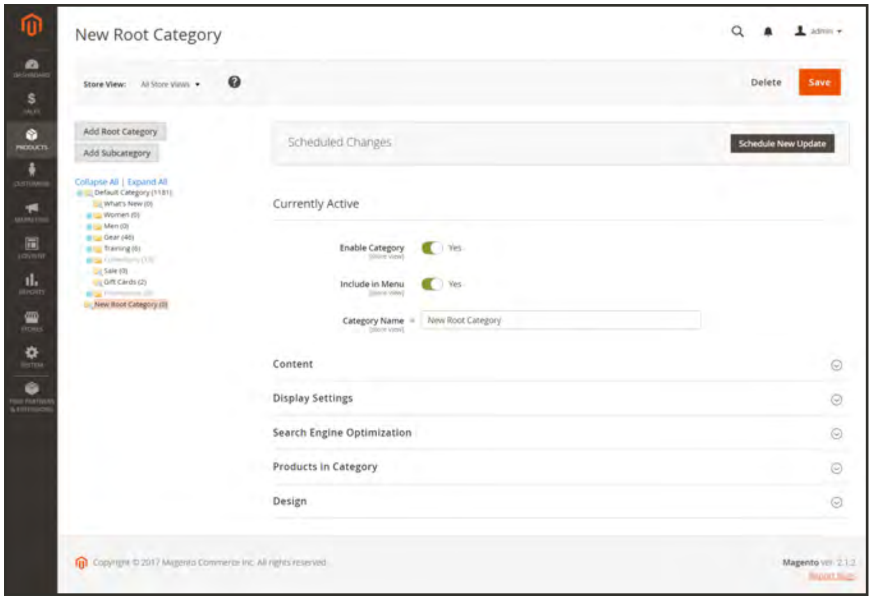
Step 2: Build Out the Main Menu

Step 3: Assign the Root Category to the Store

Step 1: Create a New Root Category

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

2. In the panel on the left, tap **Add Root Category**.



New Root Category

3. Assign a **Category Name**.

   The name you choose will initially be assigned to all store views.

4. If you want to add products to the catalog from the current catalog, do the following:

   a. Expand the **Products in Category** section.

   b. Use the search filters to find the products you want. Then, mark the checkbox of each product that you want to copy into the new catalog.

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

Step 2: Build Out the Main Menu

1. In the panel on the left, select the new root category that you created in the previous step.

2. Tap **Add Subcategory**. Then, follow the instructions to create the category structure for the main menu.

Step 3: Assign the Root Category to the Store

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

2. In the **Stores** column of the grid, click the store that you want to assign the new catalog.

3. Set **Root Category** to the new root category that you created.

4. Make sure that the store has a **Default Store View** assigned. The store must have at least one store view.

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

6. To verify that the store has a new catalog, do the following:

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

      Any products that were copied to the new catalog appear in the grid.

   b. Visit the storefront to verify that the new catalog and main menu are working correctly.

Hidden Categories

There are many ways to use hidden categories. You might want to create additional category levels for your own internal purposes, but show only the higher-level categories to your customers. Or, you might want to link to a category that is not included in the navigation menu.

To create hidden categories:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree, select the category you want to hide. Then, do the following:
   a. Set **Is Active** to "Yes."
   b. Set **Include in Menu** to "No."
3. In the **Display Settings** section, set **Anchor** to "No."

   The hidden category is active, but does not appear in the top menu, or in layered navigation.
4. Although the category is hidden, you can still create subcategories beneath it, and make them active. Complete the following settings for each hidden subcategory:
   a. Set **Enable Category** to "Yes."
   b. In the **Display Settings** section, set **Anchor** to "Yes."

   As active categories, you can now link to them from other places in your store, but they will not appear in the menu.
5. When complete, tap **Save**.

Modifying a Category

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

To move a category:

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

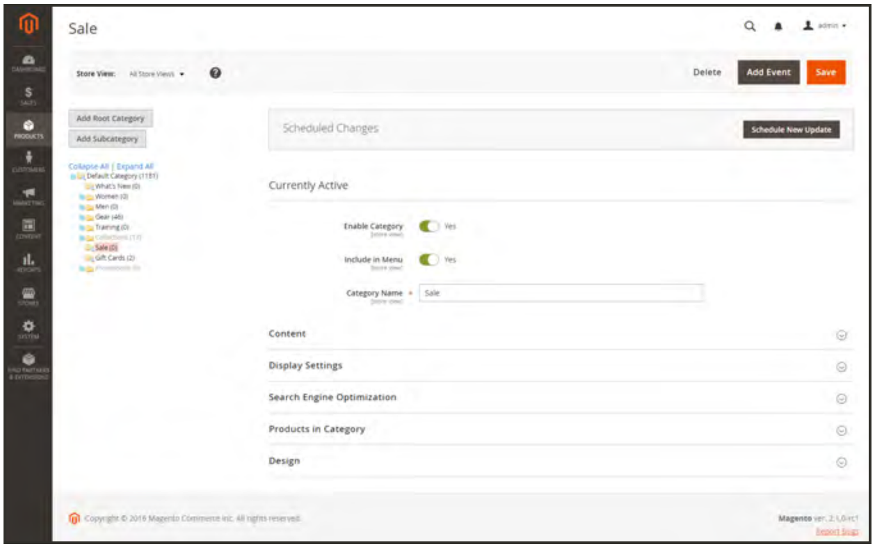
To delete a category:

3. In the category tree, select the category that you want to delete.

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

Scheduled Changes

Category updates can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to the category, or apply the changes to an existing campaign. To learn more, see: Content Staging.



Scheduled Changes

Content Settings

The Content settings determines any additional content that is to appear on the category page. In addition to the list of category products, the page can include an image, text description, and CMS block.

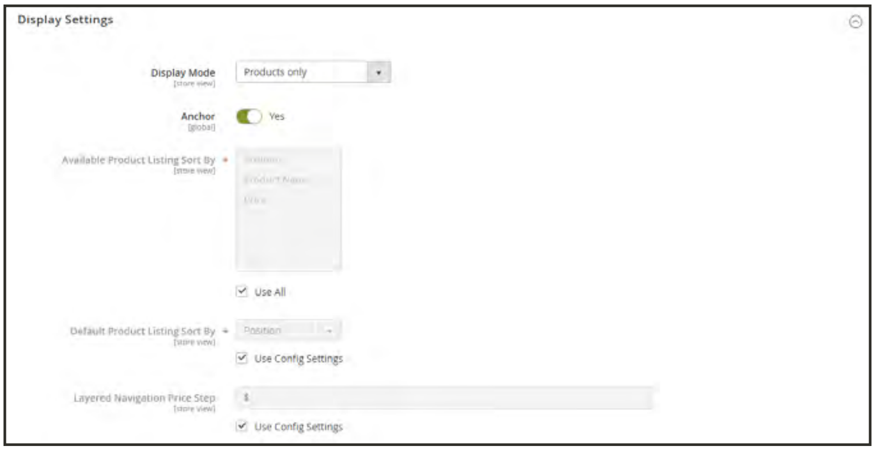
Category Content

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Category Image	Store View	Uploads an image that appears at the top of the category page. Upload — Uploads an image for the category page.
Description	Store View	Enter a description of the category content. WYSIWYG Editor — Toggles the editor between WYSIWYG and HTML modes.
Add CMS Block	Store View	Adds an existing CMS block to the category page.

Display Settings

The Display Settings determine which content elements appear on a category page and the order in which products appear. You can enable CMS blocks, set the anchor status of the category, and manage sorting options from the Display Settings tab. For examples of how categories are reflected in the storefront, see: Catalog Navigation.



Display Settings

Field Descriptions

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

Search Engine Optimization

The Search Engine Optimization section specifies the URL Key and meta data fields that are used by search engines to index the category. Although some search engines ignore meta keywords, others continue to use them. The current SEO best practice is to incorporate high-value keywords in both the meta title and meta description.

Search Engine Optimization

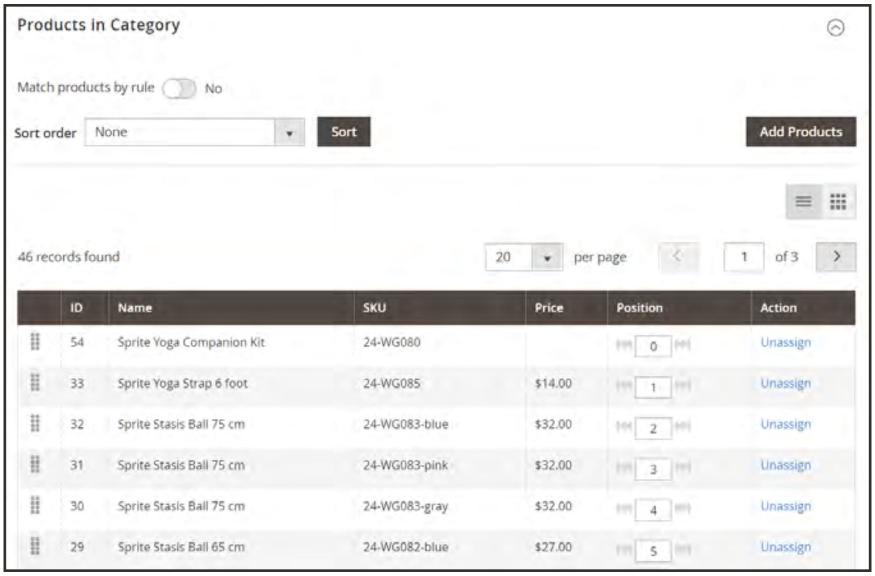
Field Descriptions

FIELD	SCOPE	DESCRIPTION
URL Key	Store View	Determines the online address of the category page. The URL key is added to the base URL of the store, and appears in the address bar of a browser. In the configuration, you can either include or exclude the category URL key in the product URL. The URL Key should be all lowercase characters, with hyphens instead of spaces. Do not include a suffix such as .html, because it is managed in the configuration.
Meta Title	Store View	The title appears in the title bar and tab of your browser, and is also 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.
Meta Keywords	Store View	Relevant keywords for the category Consider using keywords that customers might use to find products in the category.
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.

[1]Search Engine Results Page

Products in Category

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

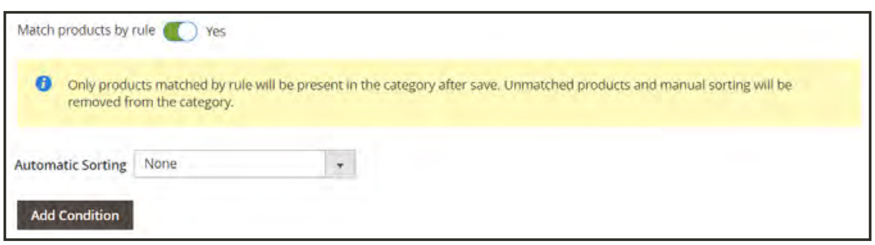


Category Products

To apply a category rule:

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

   The automatic sorting and condition options appear.



To Match Products by Rule

Automatic Sort

To apply a sort order automatically to the list, based on current conditions, set **Automatic Sorting** to one of the following:

Stock level	Move to top or bottom.
Special price	Move to top or bottom.
New Products	List newest products first.
Color	Sort alphabetically by color.
Name	Sort in ascending or descending order by Name.
SKU	Sort in ascending or descending order by SKU
Price	Sort in ascending or descending order by Price.

Add Condition

1. Tap **Add Condition**, Then, do the following:
   a. Choose the **Attribute** that is the basis of the condition.
   b. Choose the **Operator** that is needed to form the expression.
   c. Enter the **Value** that is to be matched.

Add Condition to Category Rule

2. Repeat this process for each attribute that is needed to describe the condition(s) to be met. For example, to match products that were created between 7 and 30 days ago, do the following:
   a. Set **Date Created** to "Less than 30."
   b. Set **Logic** to "AND."
   c. Set **Date Modified** to "Greater than 7."

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

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

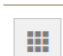
Field Definitions

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: None Move low stock to top Move low stock to bottom Special price to top Special price to bottom Newest products first Sort by color Name: A - Z Name: Z - A SKU: Ascending SKU: Descending Price: High to Low Price: Low to High
Add Condition	Adds an additional condition to the rule.
CONDITIONS	
Attribute	Determines the attribute that is used as the basis of the condition. Options: 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.

Field Definitions (cont.)

OPTION	DESCRIPTION	
	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	

Workspace Controls

CONTROL	DESCRIPTION
	View as List
	View as Tiles
	Match by Rule
	The drag and drop control allows you to grab a product and move it to another position in the current page of the grid. To learn more, see: Visual Merchandiser.
	Determines the position of the product in the list.

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:

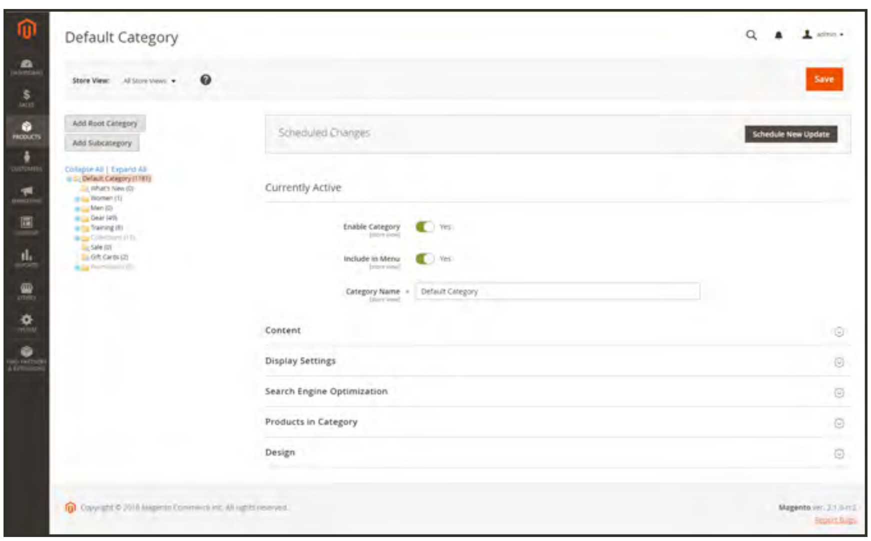
Step 1: Set the Scope of the Configuration

Step 2: Sort the Products

Step 3: Save, Refresh, and Verify

Step 1: Set the Scope of the Configuration

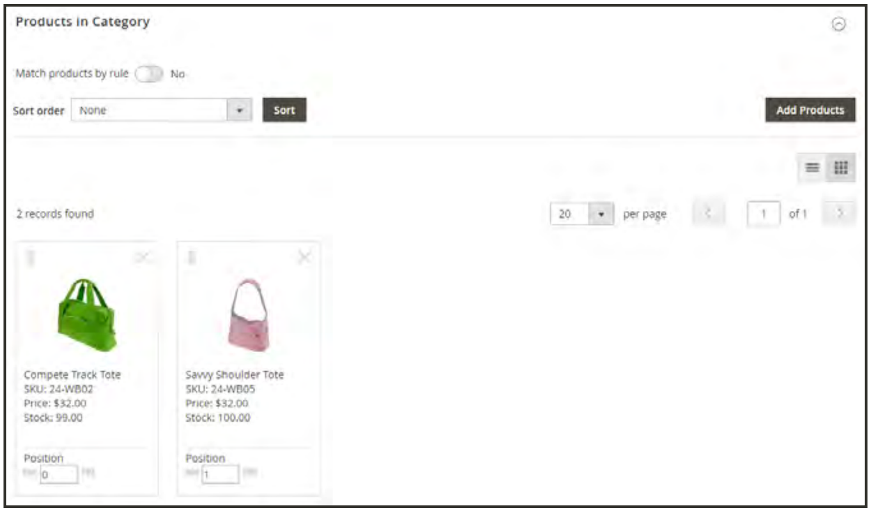
1. On Admin sidebar, choose **Catalog**. Then, choose **Categories**.
2. If necessary, choose the **Store View** where the settings apply.
3. In the category tree on the left, choose the category that you want to edit.



Category Tree

Step 2: Sort the Products

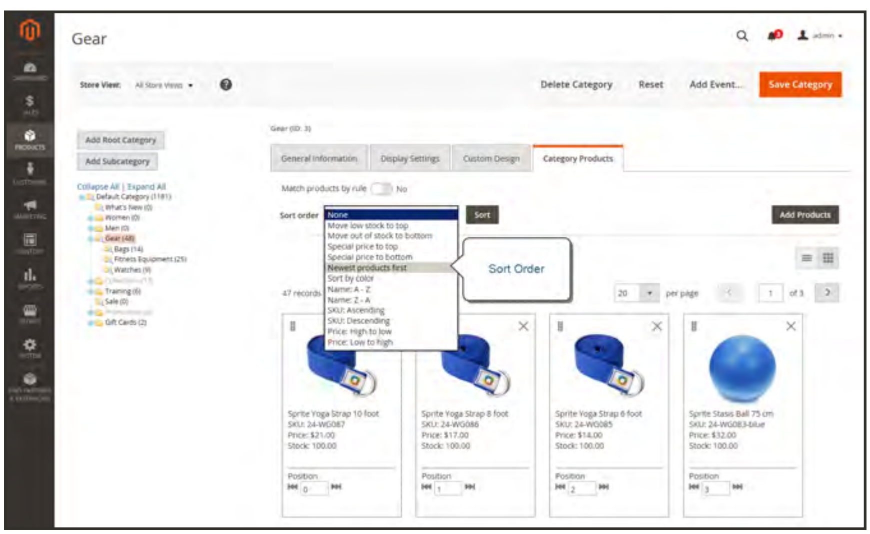
1. In the **Products in Category** section, tap the tiles (▦) button to show the product tiles in a grid. Then, use one of the following methods to sort the products:



Product Tiles

Method 1: Manual Sort

1. Set **Sort Order** to your preference.
2. Tap **Sort** to apply the new sort order.

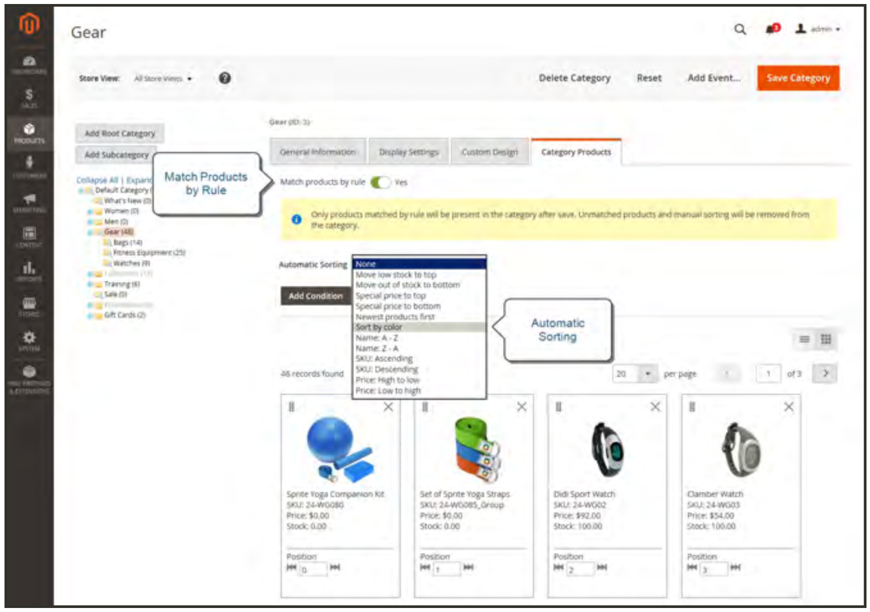


Sort Order

3. To save the sort order, tap **Save Category**.
4. When prompted, update any invalid indexers.

Method 2: Automatic Sort

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

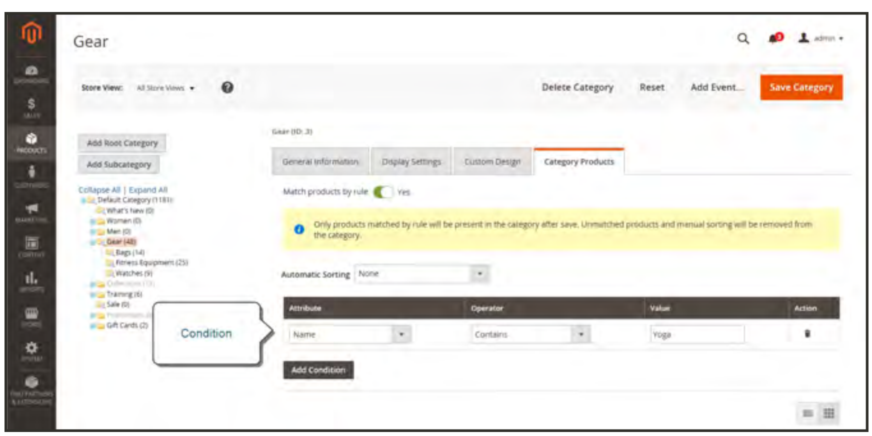


Match Products by Rule

2. Set **Automatic Sorting** to your preference.
3. Follow the instructions in the next step to create a category rule.

Step 3: Create a Category Rule

1. Set **Match products by rule** ( ) to "Yes."
2. Tap **Add Condition**. Then, do the following:



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

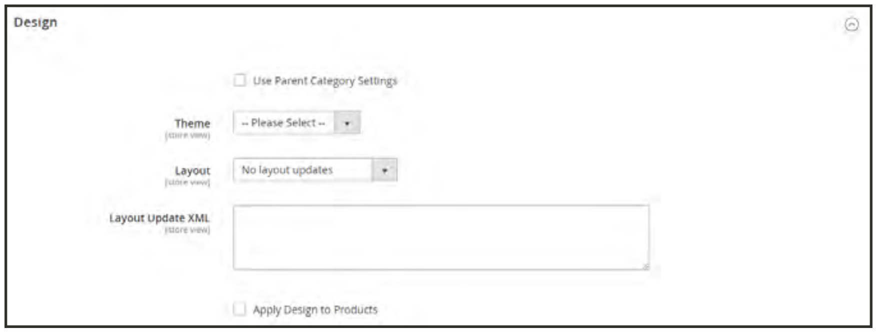
1. When complete, tap **Save Category**.

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.

Design Settings

The Design section gives you control over the look and feel of a category and all assigned product pages, and page layout. You can customize a category page its assigned products for a promotion or to differentiate the category. For example, you might develop distinctive design for a brand or special line of products, or apply an update for a specific period of time.



Design

Field Descriptions

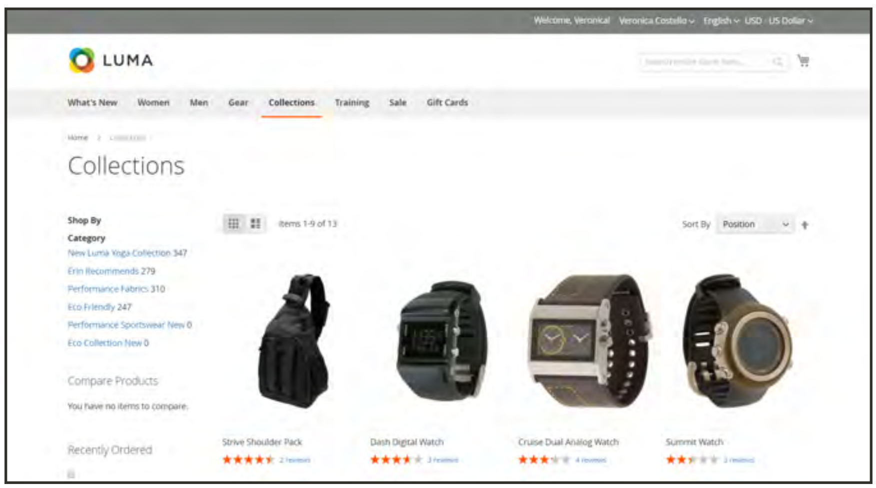
FIELD	DESCRIPTION
Use Parent Category Settings	Allows the current category to inherit the design settings from the parent category. Options: Yes / No
Theme	Applies a custom theme to the category.
Layout	Applies a different layout to the category page. Options: **No layout updates** — Preselected by default, 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.
Layout Update XML	Updates the theme layout with custom XML code.
Apply Design to Products	When selected, applies the custom settings to all products in the category.

Category Permissions

Category access can be limited to specific customer groups, or restricted entirely. You can control the display of product prices, and determine which customer groups can add products to the cart, and specify the landing page.

> Category Permissions has a global scope and when enabled, restricts access to each category according to its individual permissions. By default, Category Permissions is not enabled.

For example, if you sell only to wholesale customers, you can allow anyone to browse the catalog, but display prices and allow purchases only to those in the Wholesale customer group. In the following example, ibnly logged in users have access to the "Collections" category. For guests, the "Collections" option doesn't appear in the main menu.

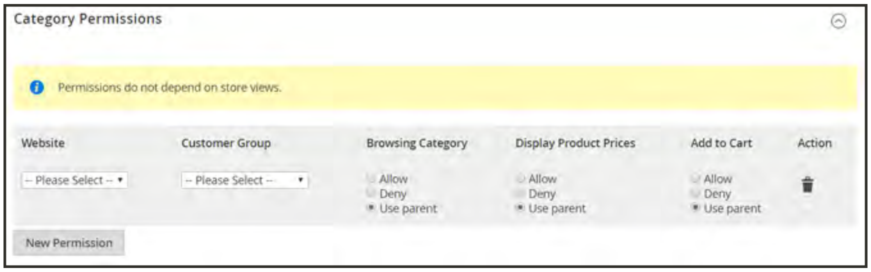


Only Logged-In Users See "Collections" Category

When enabled, a new "Category Permissions" section appears on the Category page that allows you to apply the needed access for each category. You can add multiple permission rules to each category for different websites and customer groups.

To apply category permissions:

1. Enable and configure Category Permissions.
2. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
3. In the category tree, select the target category.
4. Expand the Category Permissions section, and do the following:



Category Permissions Section

a. Choose the applicable **Website** and **Customer Group**.

b. Set the individual permissions as needed.

5. To create another permissions rule, tap **New Permission**. Then, complete the settings.

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

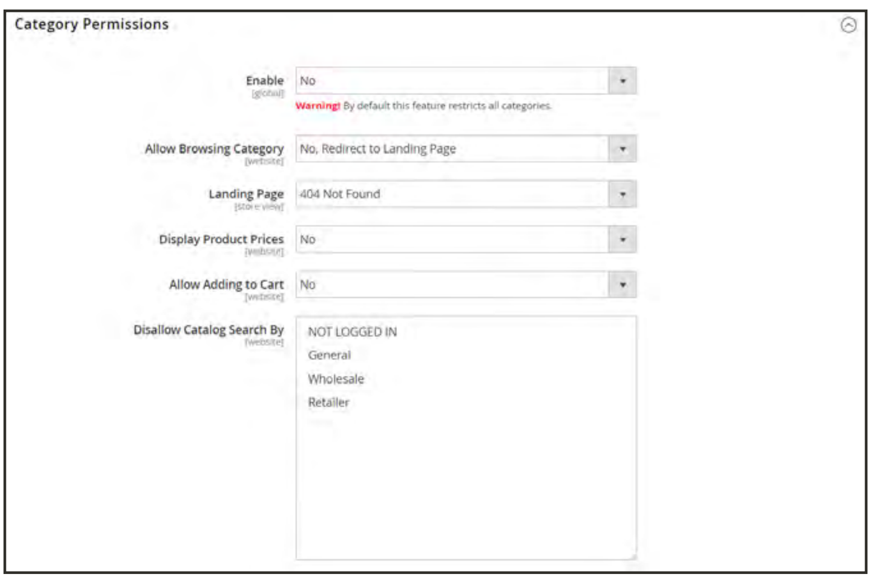
To configure category permissions:

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

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

3. Expand the **Category Permissions** section.

4. Set **Enable** to "Yes." Then, configure the following as needed:



Category Permissions

Browsing Category

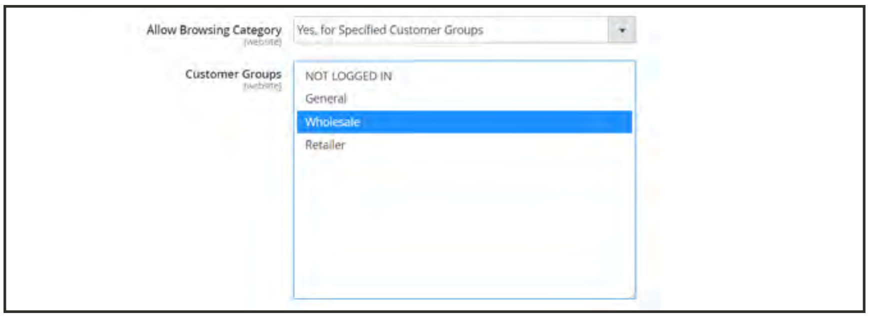
The Allow Browsing Category setting applies to all categories in the website.

For Specific Customer Groups

To allow members of a specific customer group to browse through category products, do the following:

a. Set **Allow Browsing Category** to "Specified Customer Groups".

b. In the **Customer Groups** box, select each group that is allowed to browse through products in the category. (For multiple options, hold down the Ctrl key, and click each group.)



Allow Browsing by Wholesale Customer Group

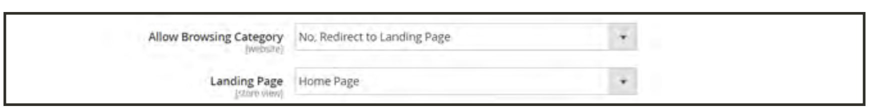
Redirect to Landing Page

The Allow Browsing Category setting applies to all categories in the website. However, a different Landing Page can be configured for each store view.

To restrict access and redirect to a landing page, do the following:

a. Set **Allow Browsing Category** to "No, Redirect to Landing Page".

b. Choose the **Landing Page** to which visitors will be redirected.



Redirect to Home Page

Product Prices

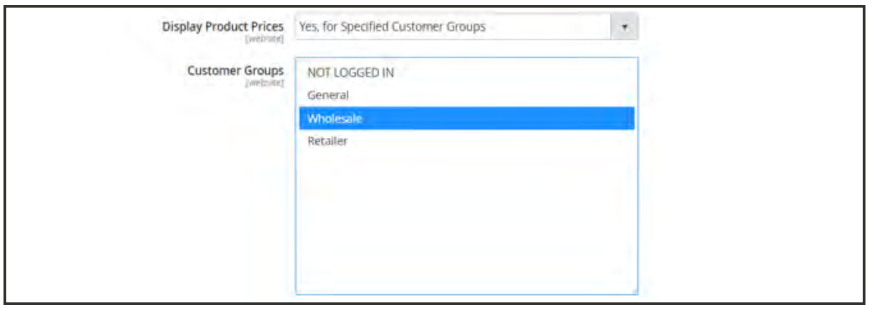
The Display Product Prices setting applies to all categories in the website.

For Specific Customer Groups

To allow only members of specific customer groups to see the price of products in the category, do the following:

a. Set **Display Product Prices** to "Yes, for Specified Customer Groups".

b. In the **Customer Groups** box, select each group that is allowed to see the price of products in the category. (For multiple options, hold down the Ctrl key, and click each group.)



Only Wholesale Customer Group Can See Prices

Add to Cart

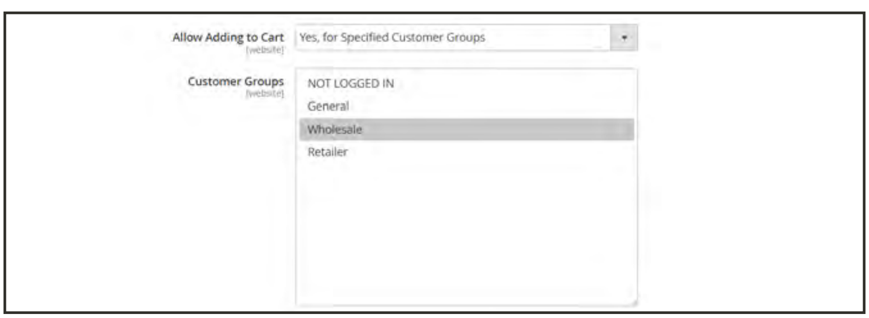
The Add to Cart setting applies to all categories in the website.

For Specific Customer Groups

To allow only members of specific customer groups to put category products into the shopping cart, do the following:

a. Set **Allow Adding to Cart** to "Yes, for Specified Customer Groups".

b. In the **Customer Groups** box, select each group that is allowed to add products from the category to the cart. (For multiple options, hold down the Ctrl key, and click each group.)



Only Wholesale Customer Group Can Put Product in Cart

Disallow Catalog Search

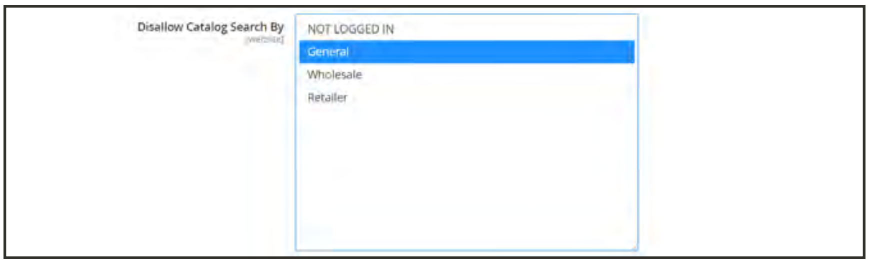
The Disallow Catalog Search setting prevents members of a specific customer group from using Catalog Search. The setting applies to all categories in the website.

For Guests

To allow only logged in customers to use Catalog Search, select "NOT LOGGED IN".

For Specific Customer Groups

In the **Disallow Catalog Search By** box, select each group to be prevented from using Category Search. (For multiple options, hold down the Ctrl key, and click each group.)



Catalog Search Not Allowed for General Customer Group

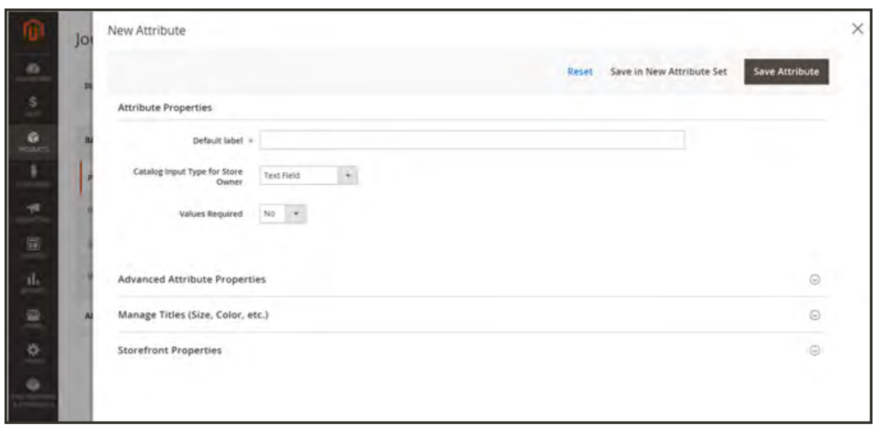
5. When complete, tap **Save Config**.
6. When prompted to update the cache, click the **Cache Management** link in the system message, and follow the instructions to refresh the cache.

CHAPTER 18:

Product Attributes

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

Attributes determine the type of input control that is used for product options, provide additional information for product pages, and are used as search parameters and criteria for layered navigation, product comparison reports, and promotions. You can create as many attributes and attribute sets as necessary to describe the products in your catalog. In addition to the attributes that you can create, system attributes, such as price, are built into the core Magento platform and cannot be changed.



Creating a New Attribute While Editing a Product

Best Practices for Product Attributes

Attribute Names

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

Attribute Use

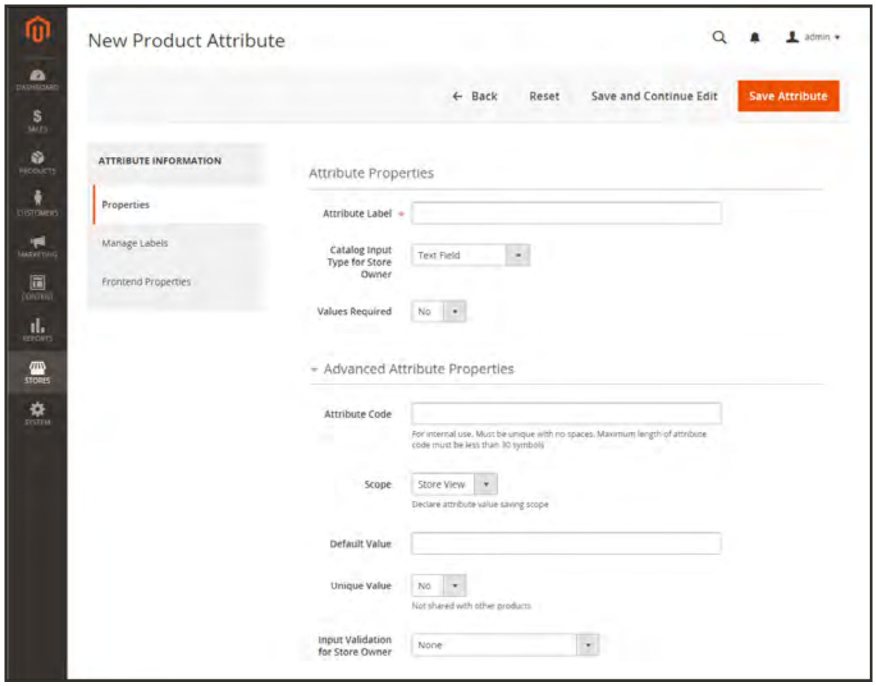
Consider how attributes are to be used when assigning properties and values. Identify the attributes that are used as labels for presentation, such as a title or product name, image, price, and description, and which attributes are used for data entry. Consider how the attributes are represented on different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

Color

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

Creating Product Attributes

Attributes can be created while working on a product, or from the Product Attributes page. The following example shows how to create attributes from the Stores menu.



New Attribute Properties

Process Overview:

Step 1: Describe the Basic Properties

Step 2: Describe the Advanced Properties

Step 3: Enter the Field Label

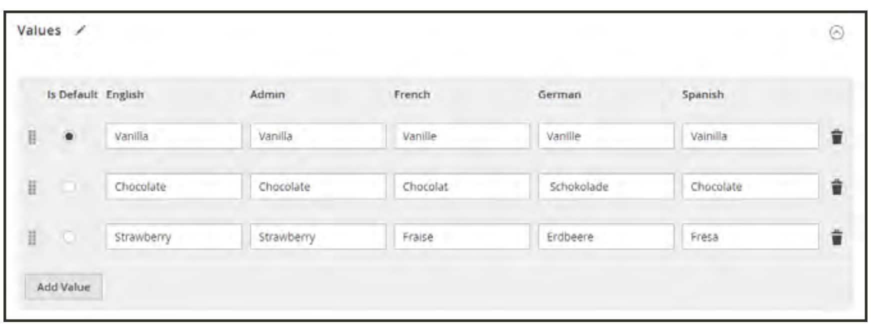
Step 4: Describe the Storefront Properties

Step 1: Describe the Basic Properties

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

Attribute Properties

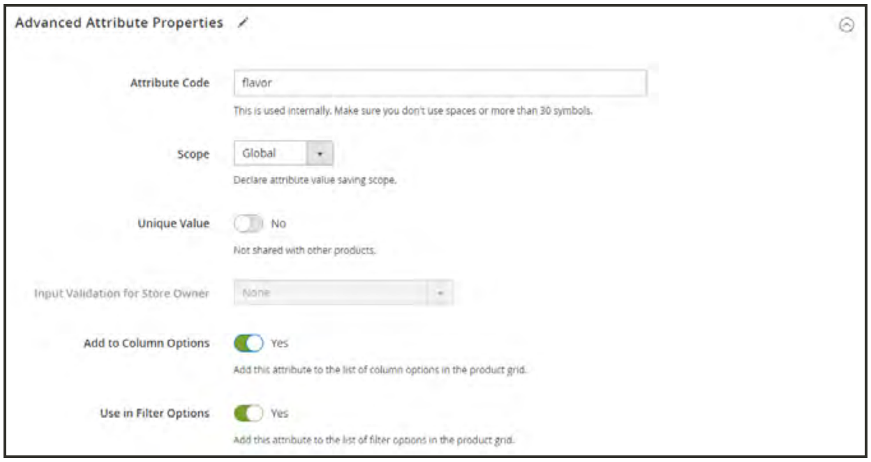
3. Under Attribute Properties, enter a **Default Label** to identify the attribute.
4. Set **Catalog Input Type for Store Owner** to the type in input control to be used for data entry.
5. For Dropdown and Multiple Select input types, do the following:
   a. Under **Manage Options**, tap **Add Option**.
   b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
   c. Tap **Add Option** and repeat the previous step for each option that you want to include in the list.
   d. Select **Is Default** to use the option as the default value.
6. If you want to require the customer to choose an option before the product can be purchased, set **Values Required** to "Yes."



Manage Options

Step 2: Describe the Advanced Properties (if needed)

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



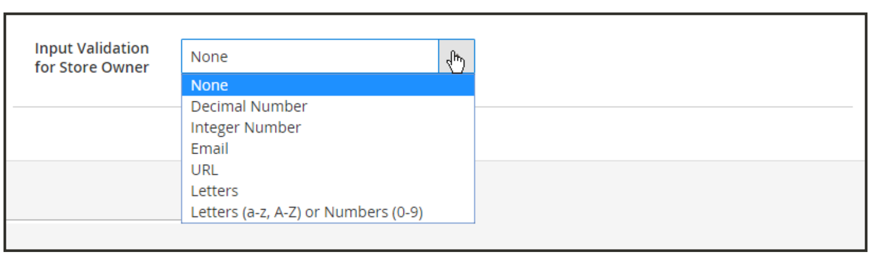
Advanced Attribute Properties

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

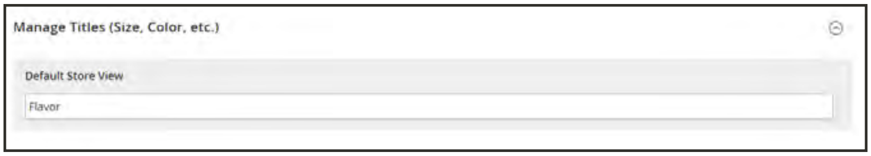
5. To add this attribute to the product grid, set the following options to "Yes."

Add to Column Options	Includes the attribute as a column in the Products grid.
Use in Filter Options	Adds a filter control to the column header in the Products grid.

Step 3: Enter the Field Label

1. Expand the **Manage titles** section.

2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.



Manage Titles

Step 4: Describe the Storefront Properties

1. In the panel on the left, choose **Storefront Properties**.

2. If the attribute is to be available for search, set **Use in Search** to "Yes."

3. To include the attribute in Product Compare, set **Comparable on Storefront** to "Yes."

4. For dropdown, multiple select and price fields, do the following:

   a. To use the attribute as a filter in layered navigation, set **Use in Layered Navigation** to "Yes."

   b. to use the attribute in layered navigation on search results pages, set **Use in Search Results Layered Navigation** to "Yes,"

   c. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.

5. To use the attribute in price rules, set **Use for Promo Rule Conditions** to "Yes,"

6. To allow the text to be formatted with HTML, set **Allow HTML Tags on Frontend** to "Yes." This setting makes the WYSIWYG editor available for the field.

   To include the attribute in catalog page listings, set **Visible on Catalog Pages on Storefront** to "Yes."

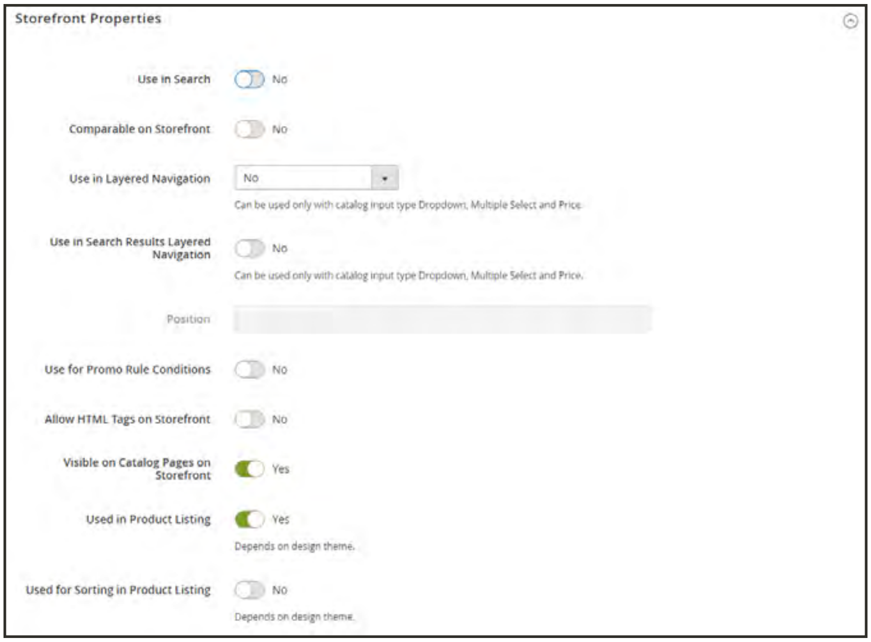
7. Complete the following settings if supported by your theme:

   a. To include the attribute on the product detail page, set **Visible on Catalog Pages on Storefront** to "Yes."

   b. To include the attribute in product listings, set **Used in Product Listing** to "Yes."

c. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to "Yes."

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



Storefront Properties

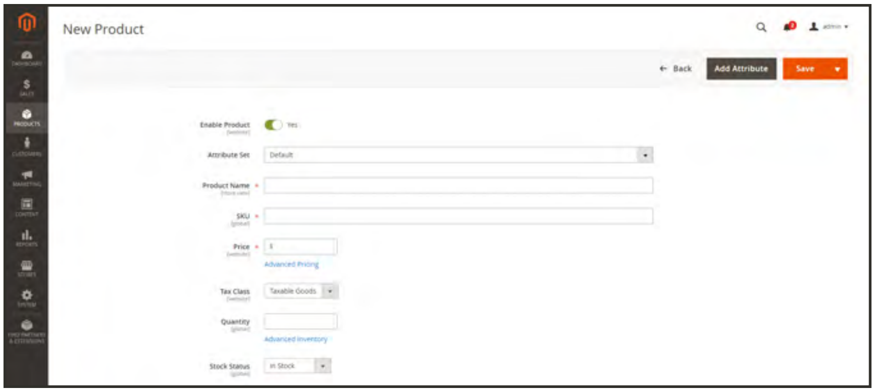
Attributes for Configurable Products

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

PROPERTY	VALUE
Catalog Input Type for Store Owner	Dropdown
Scope	Global

Adding an Attribute to a Product

Although attributes are managed primarily from the Stores menu, you can also add new attributes "on the fly" while working on a product. You can choose from the list of existing attributes, or create a new attribute. The new attribute is added to the attribute set upon which the product is based.



Add Attribute

Process Overview:

Step 1: Add a New Attribute

Step 2: Describe the Basic Properties

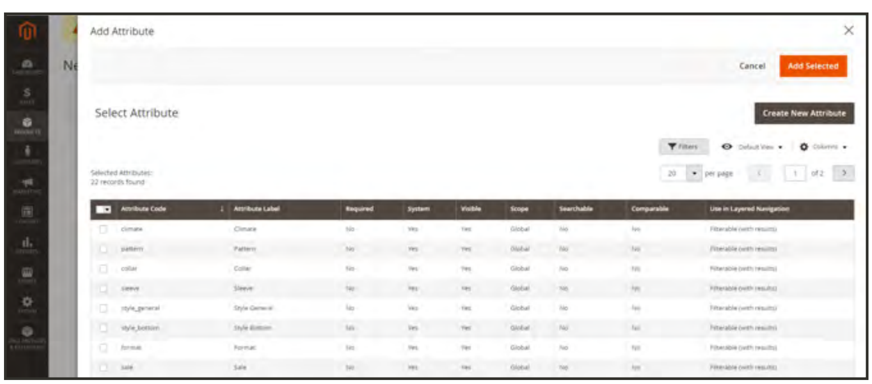
Step 3: Describe the Advanced Properties

Step 4: Enter the Field Label

Step 5: Describe the Frontend Properties

Step 1: Add a New Attribute

1. Open the product in edit mode. Then in the upper-right corner, tap **Add Attribute**.



New Attribute

2. To add an existing attribute to the product, use the filter controls to find the attribute in the grid. Then, do the following:

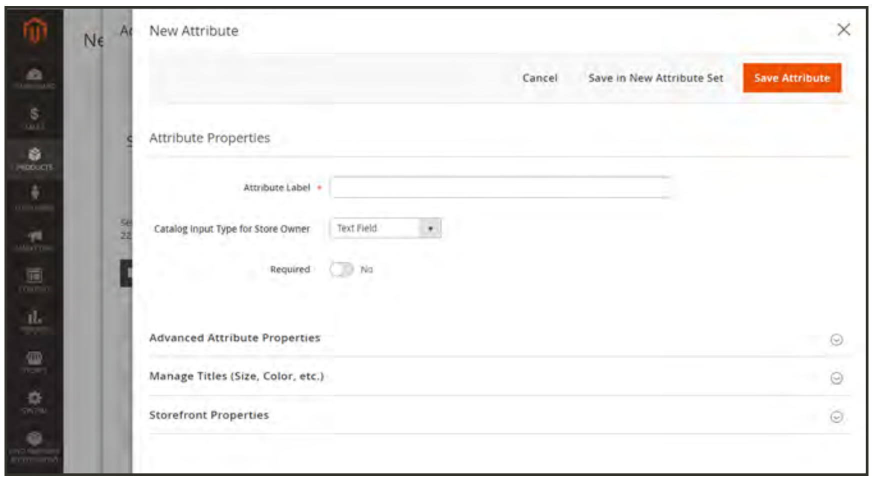
   a. Mark the checkbox in the first column of each attribute to be added.

   b. Tap **Add Selected**.

3. To define a new attribute, tap **Create New Attribute**, and complete the following steps.

Step 2: Describe the Basic Properties

1. Under **Attribute Properties**, enter a **Default Label** to identify the attribute.



2. Set **Catalog Input Type for Store Owner** to the type in input control to be used for data entry.

   If the attribute is used for a configurable product, choose “Dropdown.” Then, set **Required** to “Yes.”

3. For Dropdown and Multiple Select input types, do the following:

   a. Under **Values**, tap **Add Value**.

   b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.

   c. Tap **Add Value** and repeat the previous step for each option that you want to include in the list.

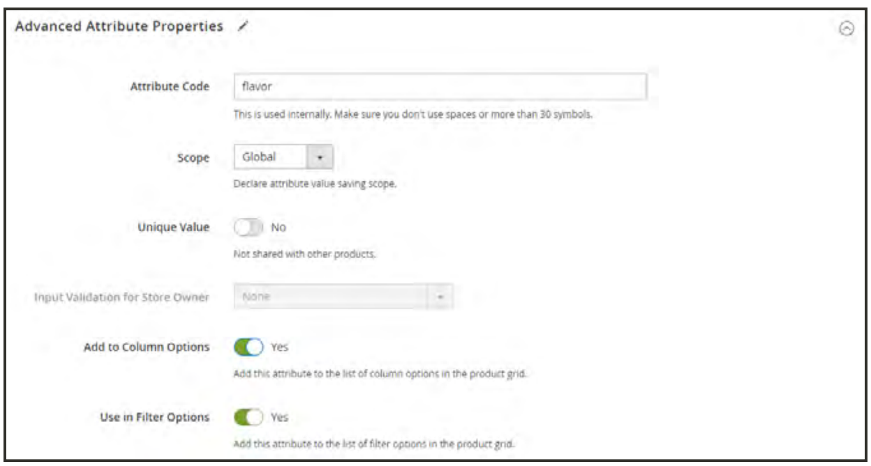
   d. Select **Is Default** to use the option as the default value.

Values

4. If you want to require the customer to choose an option before the product can be purchased, set **Required** to "Yes."

Step 3: Describe the Advanced Properties (if needed)

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



Advanced Attribute Properties

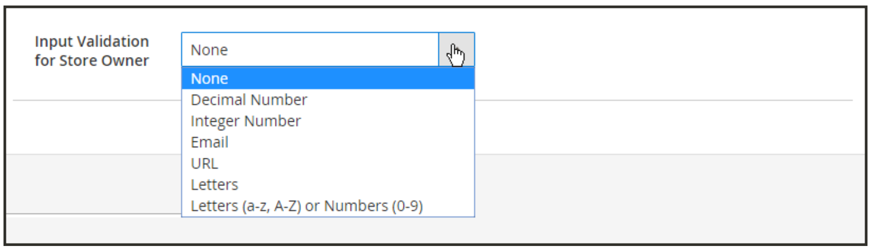
2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.

   If the attribute is used for a configurable product, choose "Global."

3. If this attribute applies only to this product, set **Unique Value** to "Yes."

4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of data that the field should contain. This field is not available for input types with values that are selected. Input validation can be used for any of the following:

   - Decimal Number
   - Integer Number
   - Email
   - URL
   - Letters
   - Letters (a-z, A-Z) or Numbers (0-9)



Input Validation

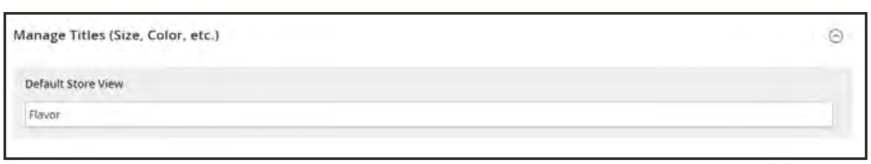
5. If you want to be able to include the attribute as a column in the Products grid, set **Add to Column Options** to "Yes."

6. If you want to be able to filter the Products grid by this column, set **Use in Filter Options** to "Yes."

Step 4: Enter the Field Label

1. Expand the **Manage titles** section.

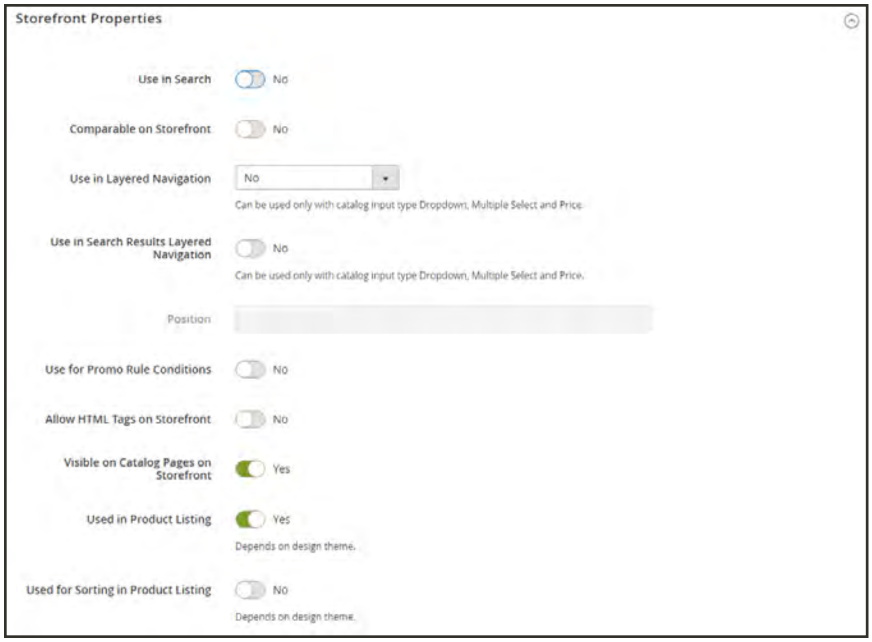
2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.



Manage Titles

Step 5: Describe the Storefront Properties

1. Expand the **Storefront Properties** section. Then, do the following:



Storefront Properties

a. To make the attribute available for search, set **Use in Search** to "Yes."

b. To include the attribute in Product Compare, set **Comparable on Storefront** to "Yes."

c. To include dropdown, multiple select, or price attributes in layered navigation, set **Use in Search Results Layered Navigation** to one of the following:

Filterable (with results)	Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters. The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.
Filterable (no results)	Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.

d. To use in layered navigation on search results pages, set **Use in Search Results Navigation** to "Yes."

  e. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.

  f. To use the attribute in price rules, set **Use for Promo Rule Conditions** to “Yes.”

  g. To allow the text to be formatted with HTML, set **Allow HTML Tags on Storefront** to “Yes.”

     This setting makes the WYSIWYG editor available when editing the field.

  h. To include the attribute on the product page, set **Visible on Catalog Pages on Storefront** to “Yes.”

2. Complete the following settings as supported by your theme:

  a. To include the attribute in product listings, set **Used in Product Listing** to “Yes.”

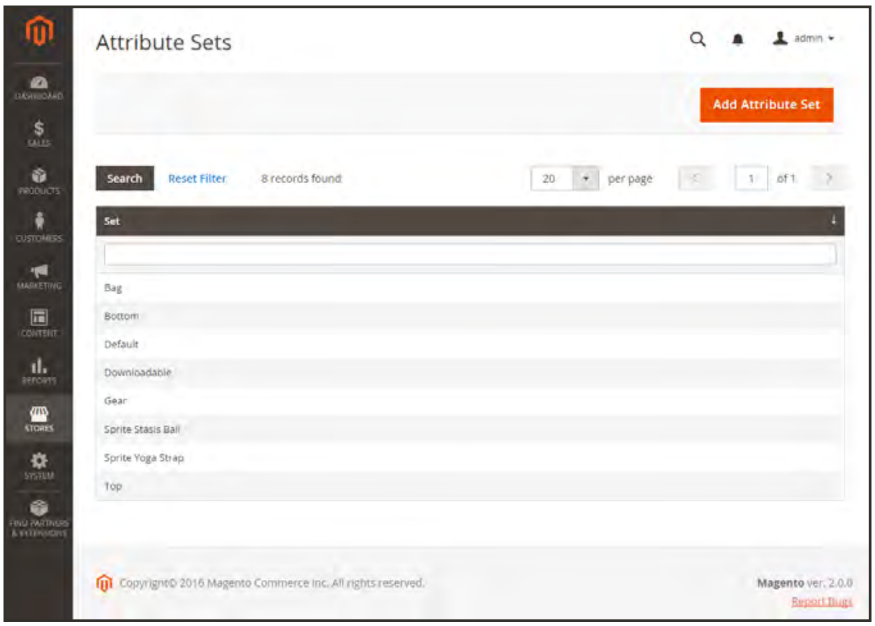
  b. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to “Yes.”

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

Attribute Sets

One of the first steps when creating a product is to choose the attribute set that is used as a template for the product record. The attribute set determines the fields that are available during data entry, and the values that appear to the customer.

The attributes are organized into groups that determine where they appear in the product record. Your store comes with an initial attribute set called “default” which includes a set of commonly-used attributes. If you would like to add only a small number of attributes, you can add them to the default attribute set. However, if you sell products that require specific types of information, such as cameras, it might be better to create a dedicated attribute set that includes the specific attributes that are needed to describe the product.



Attribute Sets

To create an attribute set:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.
2. Tap **Add New Set**. Then, do the following:

Edit Set Name

a. Enter a **Name** for the attribute set.

b. Set **Based On** to an existing attribute set to be used as a template.

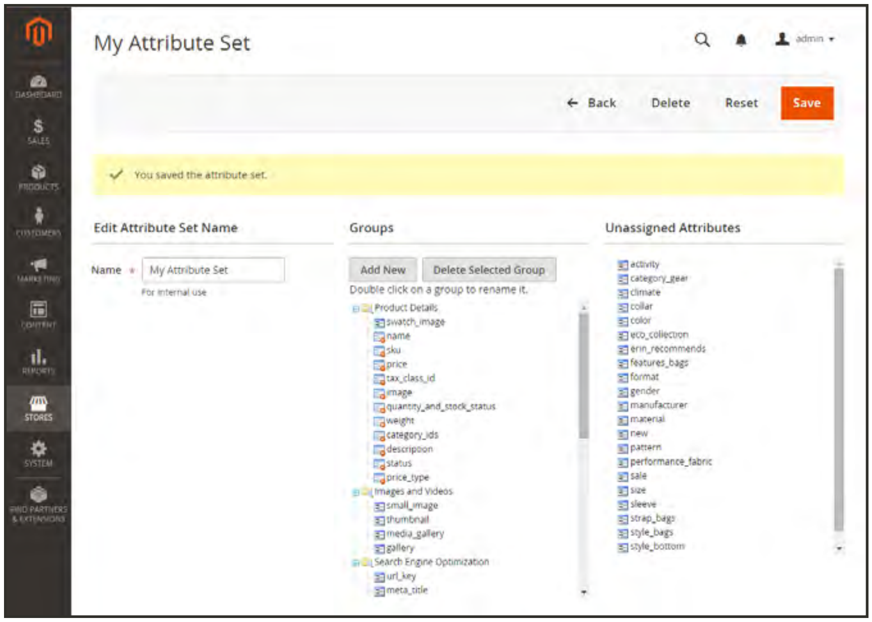
c. Tap **Save** . The next page displays the following:

- The left column shows the name of the attribute set. The name is for internal reference, and can be changed as needed.
- The center of the page lists the current selection of attribute groups.
- The right column lists the selection of attributes that are currently not assigned to the attribute set.

d. To add a new attribute to the set, drag the attribute from the **Unassigned Attributes** list to the appropriate folder in the **Groups** column.

> System attributes are marked with a dot and cannot be removed from the Groups list. They can however, be dragged to another Group in the attribute set.

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



Edit Attribute Set

To create a new attribute group:

1. In the Groups column the attribute set, tap **Add New**.
2. Enter a **Name** for the new group, and tap **OK**.
3. Do either of the following:
   - Drag **Unassigned Attributes** to the new group.
   - Drag attributes from any other group to the new group.

The new group becomes a section of attributes in any product that is based on the attribute set.

Attribute Input Types

When viewed from the Admin, attributes are the fields that you complete when you create a product. The input type that is assigned to an attribute determines the type of data that can be entered and the format of the field or input control. From the standpoint of the customer, attributes provide information about the product, and are the options and data entry fields that must be completed to purchase a product.

Attribute Input Types

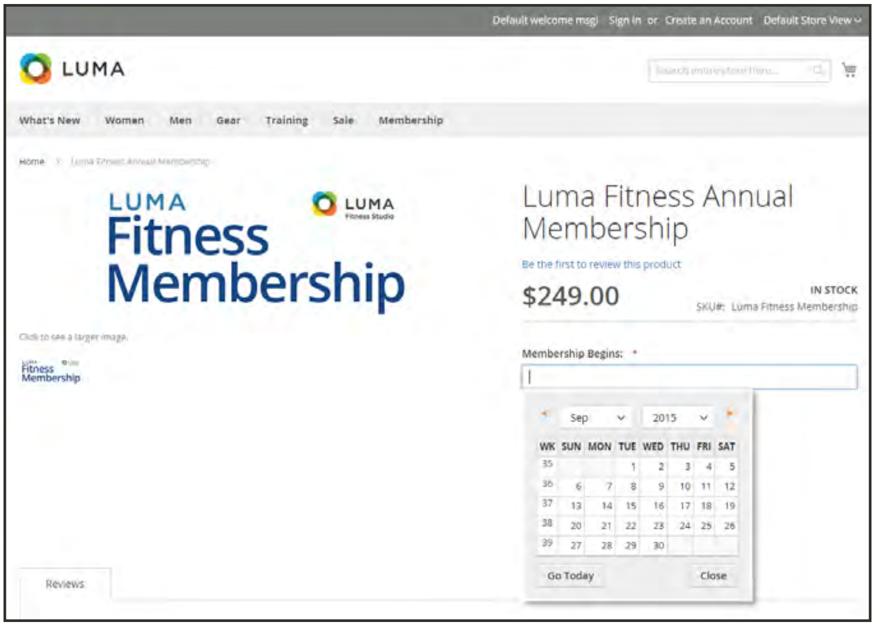
PROPERTY	DESCRIPTION
Text Field	A single line input field for text.

Attribute Input Types (cont.)

PROPERTY	DESCRIPTION
Text Area	A multiple-line input field for entering paragraphs of text such as a product description. You can use the WYSIWYG Editor to format the text with HTML tags, or type the tags directly into the text.
Date	Date values can be entered by making a selection from a drop-down list, or popup calendar ( ). Depending on your system configuration, dates can be typed directly into a field, or selected from the calendar or list. To format date and time values, see: 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	This input type is used to create price fields that are in addition to the predefined attributes, Price, Special Price, Tier Price and Cost. The currency used is determined by your system configuration.
Media Image	Associates an additional image with a product, such as a product logo, care instructions, or ingredients from a food label. When you add a media image attribute to the attribute set of a product, it becomes an additional image type, along with Base, Small, and Thumbnail. The media image attribute can be excluded from the media gallery.
Fixed Product Tax	Lets you define FPT rates based on the requirements of your locale.
Visual Swatch	Displays a swatch that depicts the color, texture, or pattern of a configurable product. A visual swatch can be filled with a hexadecimal color value, or display an uploaded image that represents the color, material, texture, or pattern of the option.
Text Swatch	A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values.

Date & Time Options

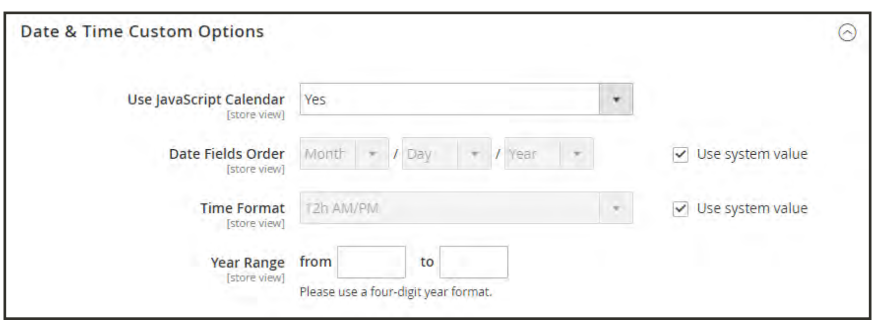
You can customize the format of date and time fields, and select the input control that is used for data entry. Dates values can be selected from a drop-down list, or pop-up calendar.



Pop-up Calendar

To format date/time fields:

1. On the Admin sidebar, tap **Stores**. Then under **Settings,** choose **Configuration**.
2. In the panel on the left, tap **Catalog**. Then, choose the **Catalog** option.
3. Expand the **Date & Time Custom Options** section.
4. To use a popup calendar as the input control for date fields, set **Use JavaScript Calendar** to "Yes."
5. To establish the **Date Fields Order**, do the following:
   a. Clear the **Use system value** checkbox.
   b. Set the order of each part of the date field as needed:
      - Month
      - Day
      - Year
   c. To set your preferred time format, do the following:
   d. Clear the **Use system value** checkbox.
   e. Set **Time Format** to one of the following:
      - 12h AM/PM
      - 24h
   f. To establish the **Year Range** for the drop-down values, enter the year in "YYYY" format to set the **from** and **to** dates. If blank, the field defaults to the current year.



Date & Time Custom Options

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

CHAPTER 19:

Using a Flat Catalog

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

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

[1]Entity Attribute Value

Flat Catalog Setup

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

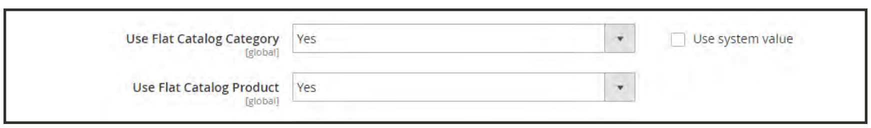
Process Overview:

Step 1: Enable the Flat Catalog

Step 2: Verify the Results

Step 1: Enable the Flat Catalog

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



Flat Catalog Configuration

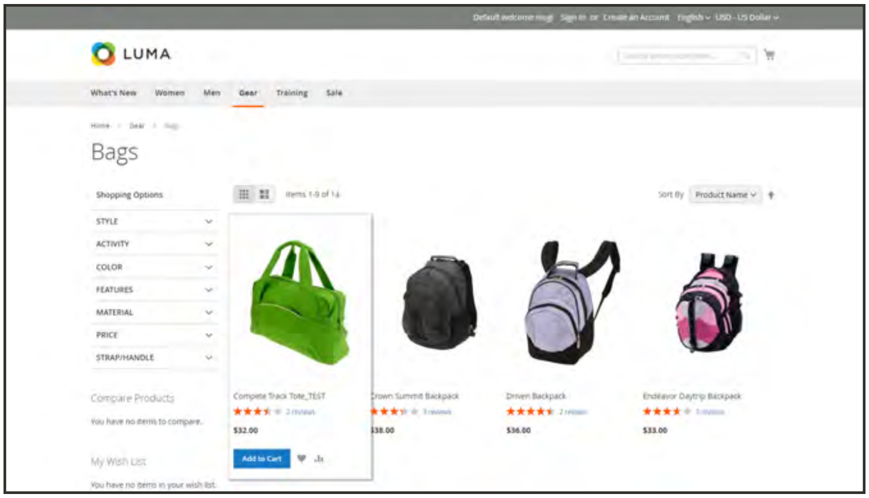
4. When complete, tap **Save Config**.
5. When prompted to update the cache, click the **Cache Management** link in the system message, and follow the instructions to refresh the cache.

Step 2: Verify the Results

Method 1: Verify the Results for a Single Product

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

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



Storefront with Flat Catalog

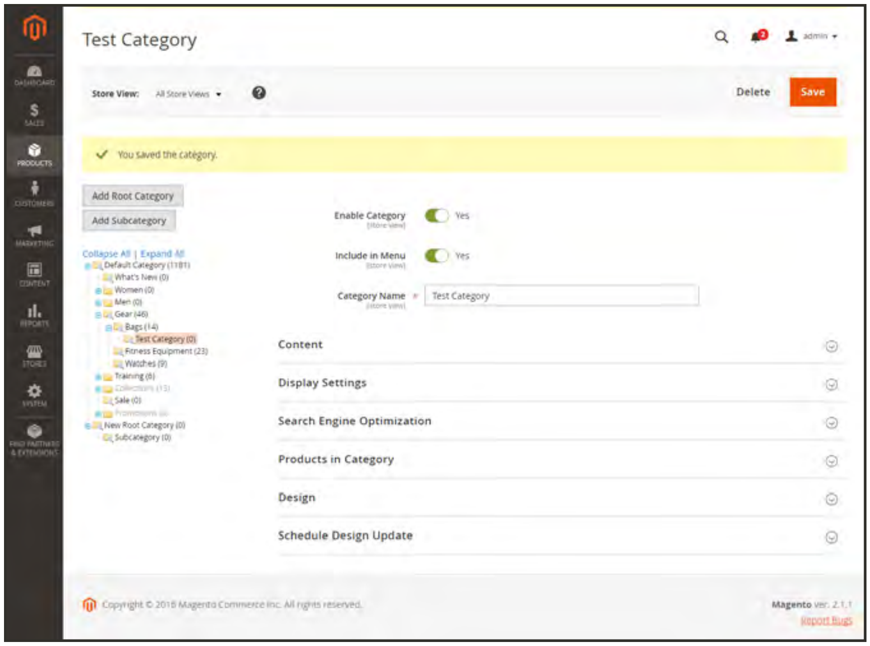
Method 2: Verify the Results for a Category

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.
2. In the upper-left corner, verify that **Store View** is set to "All Store Views."

   If prompted, tap **OK** to confirm.
3. In the category tree, select an existing category. Then, tap **Add Subcategory**, and do the following:

   a. In the **Category Name** field, enter "Test Category."

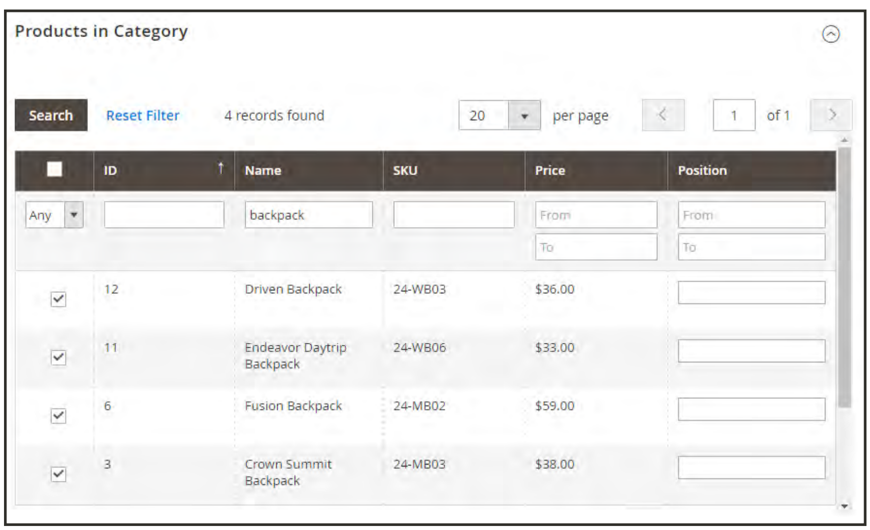
   b. When complete, tap **Save**.



Test Subcategory

c. Expand the **Products in Category** section. Then, click **Reset Filter** to display all products.

d. Mark the checkbox of several products to add them to the new category. Then, tap **Save**.



Test Category Products

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

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

Step 3: Remove the Test Data

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

Remove the test category:

1. On the Admin sidebar, tap **Products**. Then, choose **Categories**.
2. In the category tree, select the test subcategory that you created.
3. In the upper-right corner, tap **Delete**. Then when prompted to confirm, tap **OK**.

   This will not remove the products that are assigned to the category.

Restore the original product name:

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

Restore the original catalog configuration:

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

MARKETING

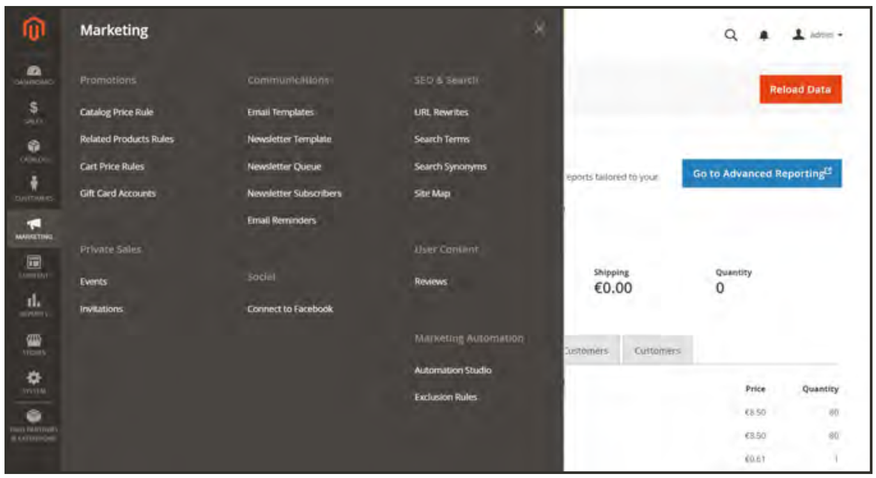
Contents

In this section of the guide, you'll learn how to leverage your store's built-in shopping tools to create opportunities for customer engagement, and how to set up targeted promotions with price rules. Leverage multiple sales channels by sending your product feeds to shopping sites and marketplaces. Then, use Google tools to analyze traffic, optimize your content, and plan your next campaign.

CHAPTER 20:

Marketing Menu

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



Marketing Menu

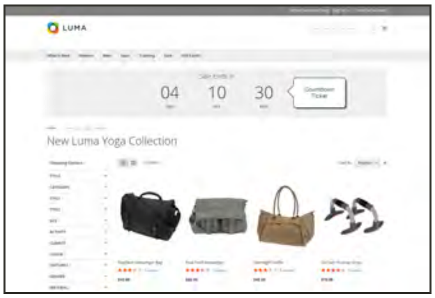
To display the Marketing menu:

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

Main Sections

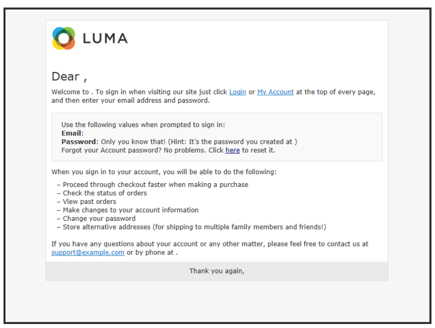
Promotions

Create catalog and cart price rules that trigger discounts based on a variety of conditions. Set up promotions that spring into action when the required conditions are met. Create related product rules and manage gift card accounts.



Private Sales

Private sales and other catalog events are a great way to leverage your existing customer base to generate buzz and new leads with exclusive access for members only, or by invitation.

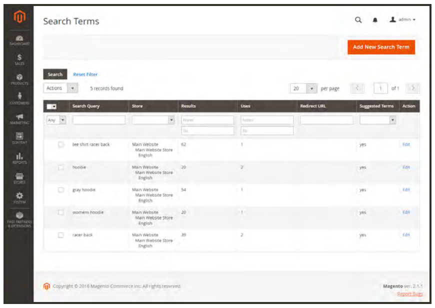


Communications

Customize all notifications sent from your store. Create newsletters and publish RSS feeds.Set up rules that send email reminders to customers whenever the conditions are met.

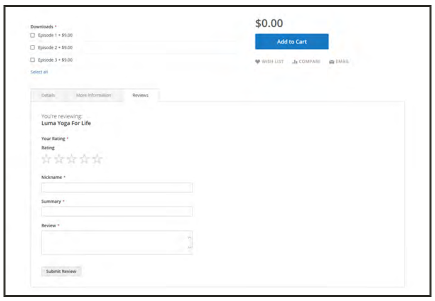
Social

Connect your store to Facebook.



SEO & Search

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



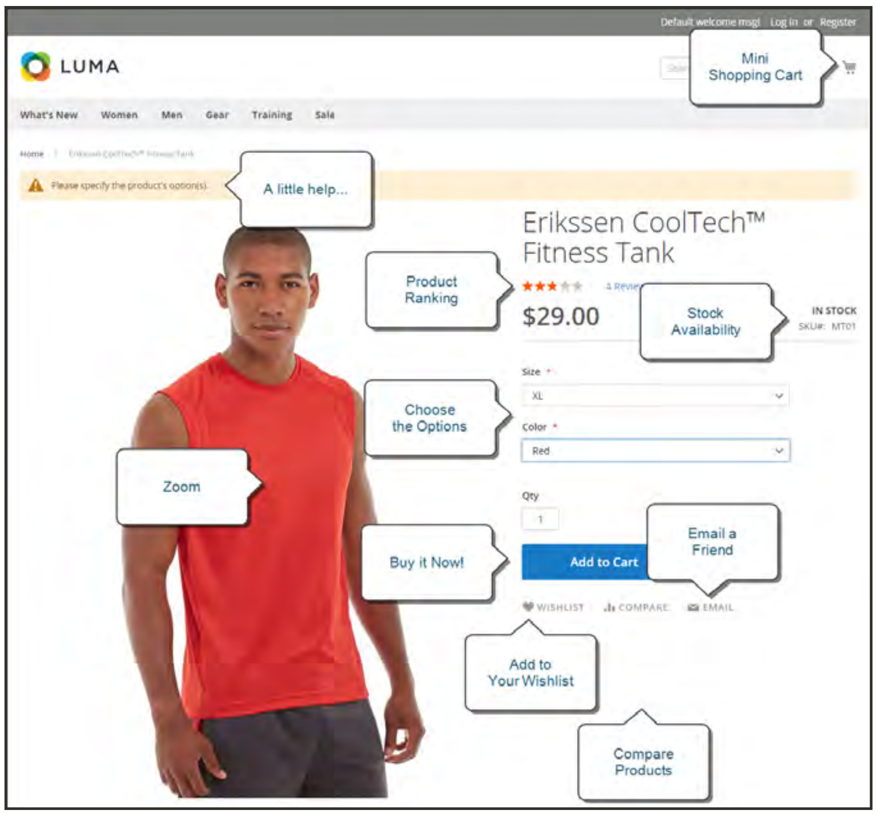
User Content

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

CHAPTER 21:

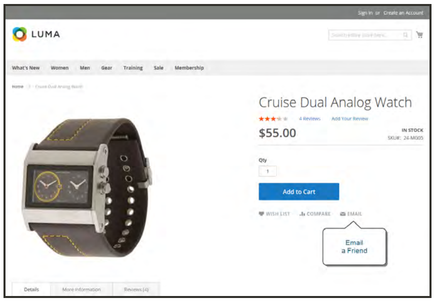
Shopping Tools

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



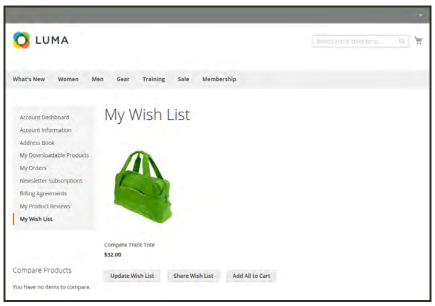
Product Page

Opportunities to Engage



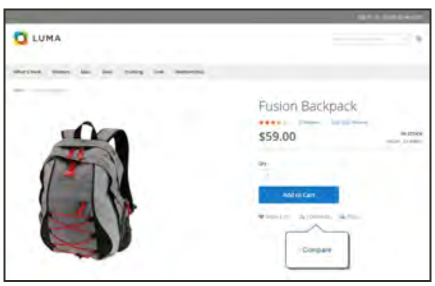
Email a Friend

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



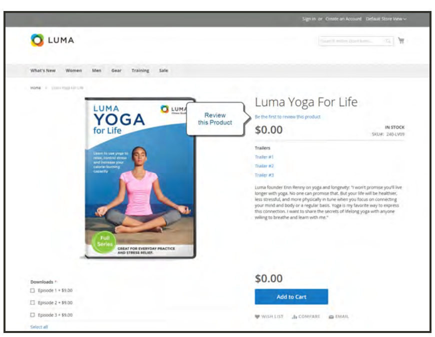
Wish List

A wish list is a list of products that a registered customer can share with friends, or save to transfer to the cart at a later date.



Compare Products

The Compare Products block lets your customers quickly compare the features of one product with another.

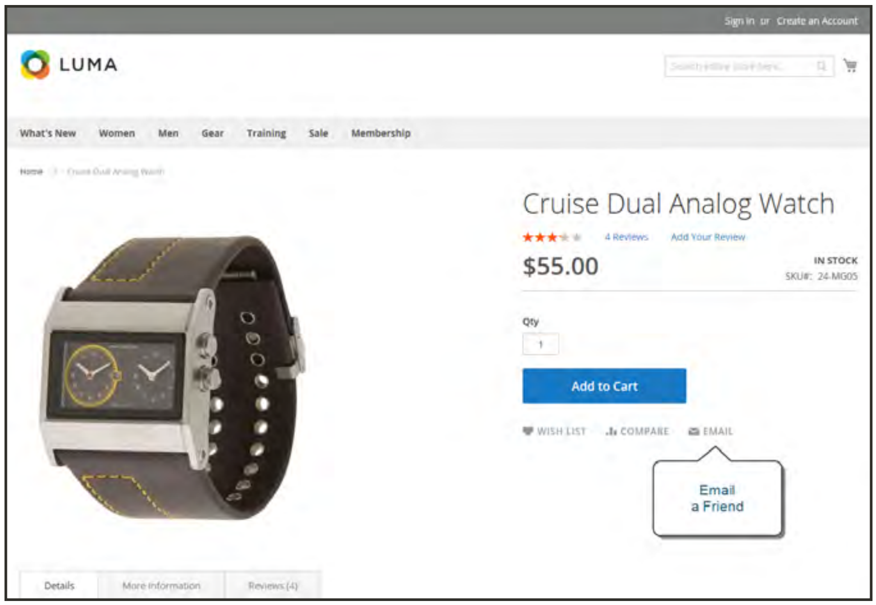


Product Reviews

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

Email a Friend

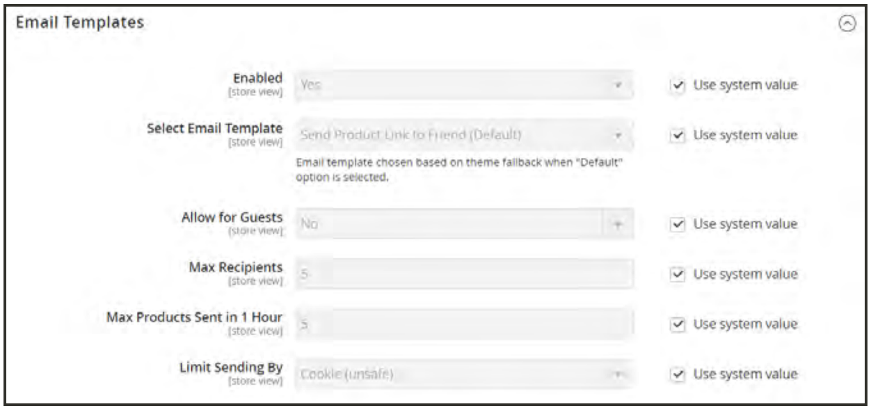
The Email a Friend link makes it easy for your customers to share links to products with their friends. In the Magento demo store, the Email a Friend link appears as an envelope icon. The message template can be customized for your voice and brand. To prevent spamming, you can limit the number of recipients for each email, and the number of products that can be shared over a one-hour period.



Email a Friend

To configure Email a Friend:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Email to a Friend**.
3. Expand the **Email Templates** section. Then, do the following:



Email Templates

a. Set **Enabled** to “Yes.”

b. Set **Select Email Template** to the template you want to use as the basis of the messages.

c. If you want to require that only registered customers can send email to friends, set **Allow for Guests** to “No.”

d. In the **Max Recipients** field, enter the maximum number of friends who can be on the distribution list for a single message.

e. In the **Max Products Sent in 1 Hour** field, enter the maximum number of products that can be shared by a single user with friends over a one-hour time period.

f. Set **Limit Sending By** to one of the following methods to identify the sender of emails:

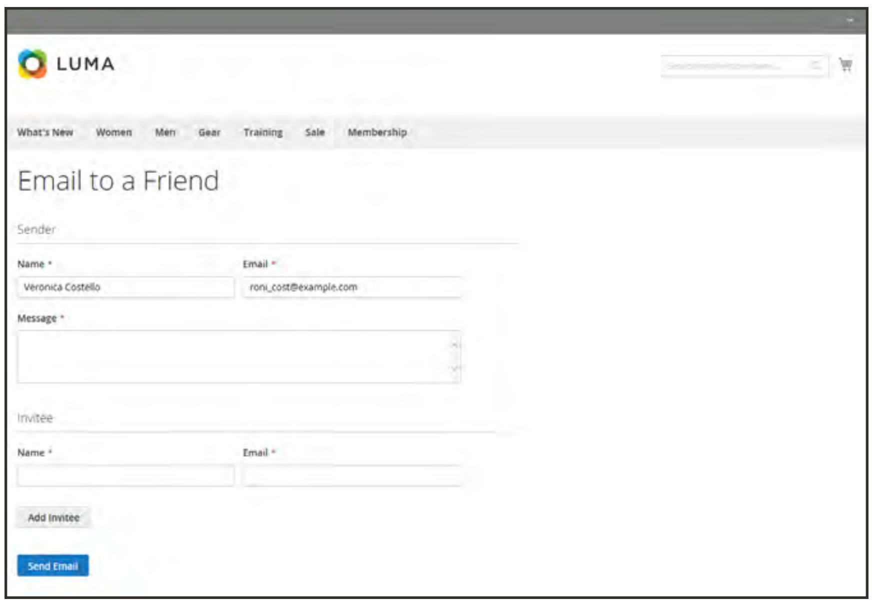
IP Address	(Recommended) Identifies the sender by the IP address of the computer that is used to send the emails.
Cookie (unsafe)	Identifies the sender by browser cookie. This method is less effective because the sender can delete the cookie to bypass the limit.

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

To send email to a friend:

1. On a catalog page, click the **Email a Friend** link. Then, do one of the following:
   - Log in to your customer account.
   - Sign up for a new account.
2. Complete the **Message** and enter the recipient **Name** and **Email Address**. To add more recipients, do the following:
   a. Tap **Add Invitee**.
   b. Enter the **Name** and **Email Address** of the additional person.

   You can send the message to as many additional people as the configuration allows.
3. When ready to send the message, tap **Send Email**.



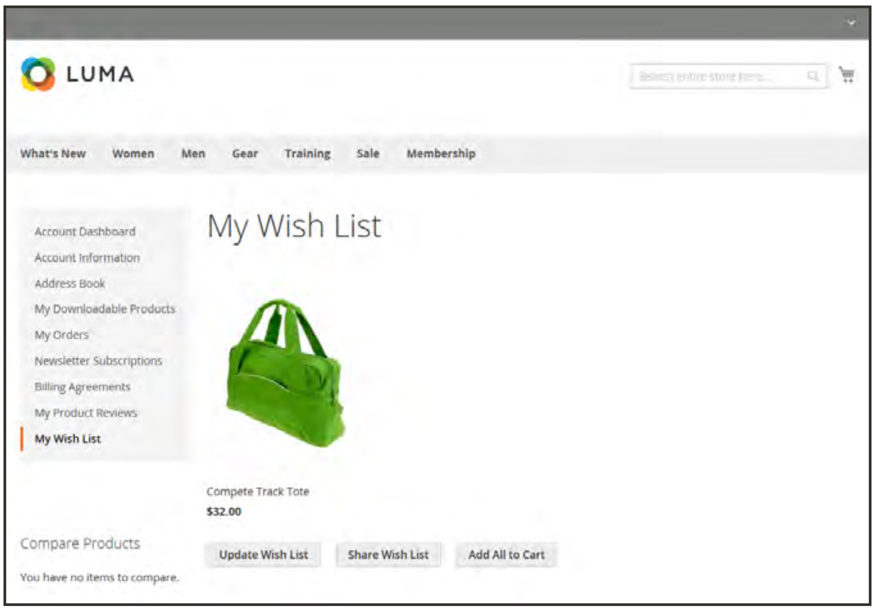
Email a Friend Form

Wish Lists

A wish list is a list of products that a registered customer can share with friends, or save to transfer to the cart at a later date. When wish lists are enabled, the Add to Wishlist link appears on the category and product pages of each product in the store. Depending on the theme, it might be a text link or a graphic image.

Shared wish lists are sent from a store email address, but the body of the message contains a personalized note from the customer. You can customize the email template that is used when wish lists are shared, and choose the store contact that appears as the sender.

Wish lists can be updated from the dashboard of the customer account, Items can be added or transferred between the wish list and cart by the customer or by the store administrator.



Wish List in Customer Account

When a product with multiple options is added to a wish list, any options that have been selected by the customer are included in the wish list item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wish list item. On the other hand, if the customer adds the same product to the wish list multiple times, the product appears only once, but with an updated quantity that reflects the number of times the product was added.

Configuring Wish Lists

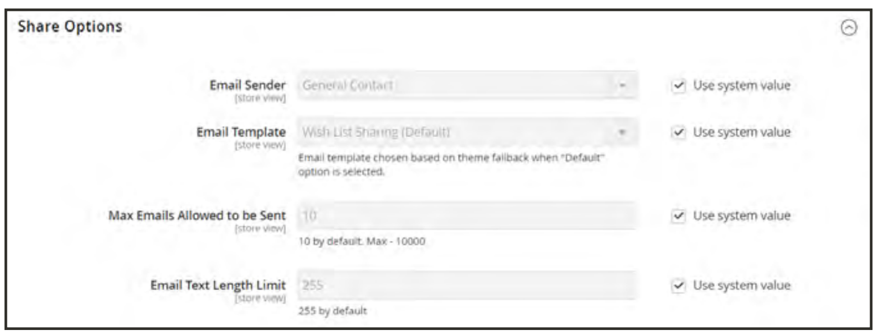
The configuration enables wish lists, and determines the email template and sender of email messages that are used when a wish list is shared.

To configure the wish list:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Wish List**.
3. Expand the **General Options** section. Then, verify that **Enabled** is set to "Yes."

General Options

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



Share Options

   a. Set **Email Sender** to the store contact that appears as the sender of the message.

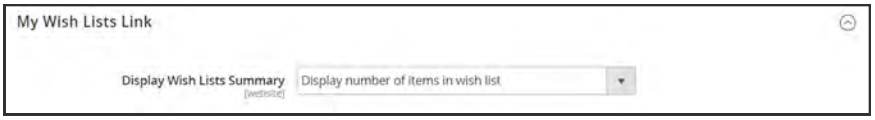
   b. Set **Email Template** to the template to be used when a customer shares a wish list.

   c. To limit the number of emails a customer can send in a batch, enter the **Max Emails Allowed to be Sent**. The default value is 10, and the maximum allowed is 10,000.

   d. To limit the size of the message, enter the **Email Text Length Limit.** The default value is 255.

5. Expand the **My Wish List Link** section. Then, set **Display Wish List Summary** to one of the following:

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

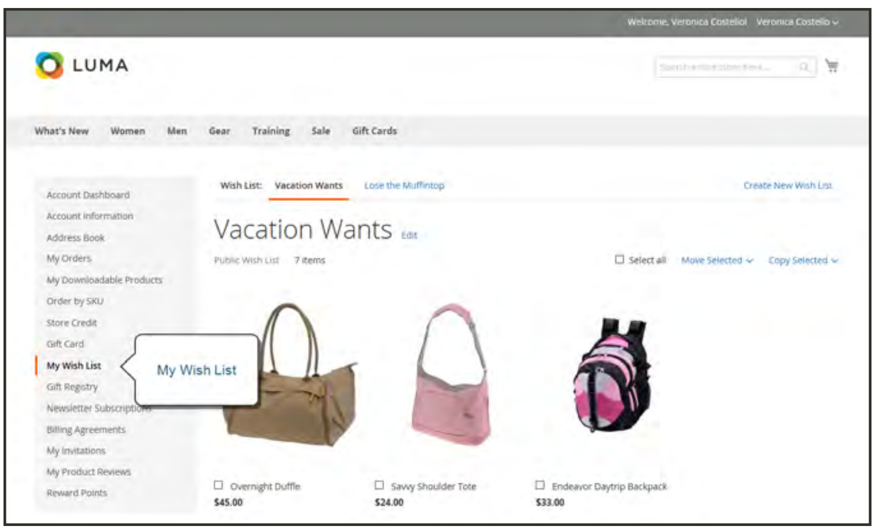


My Wish List Link

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

Updating Wish Lists

Customers can manage their wish lists by logging in to their accounts. Store administrators can also manage customer wish lists from the Admin.



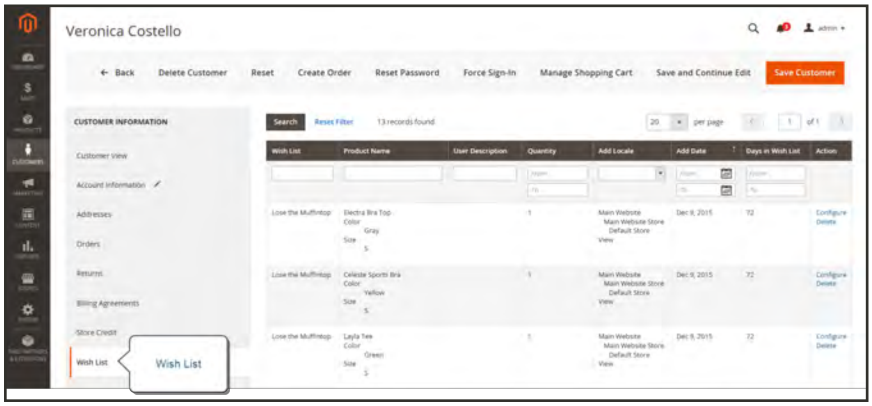
"My Wish List" in Customer Account

To update the wish list from a customer account:

1. Log in to your customer account. Then in the panel on the left, choose **My Wish List**.
2. Find the item you want to edit in the wish list, and do any of the following:
   - Update the Qty.
   - Edit the product options.
   - Add a comment.
   - Add to Gift Registry.
   - Move or Copy to a New Wish List.
   - Delete the item from the wish list.
   - Add to Cart
3. When complete, tap **Update Wishlist**.

To update wish list items from the Admin:

1. On the Admin sidebar, tap Customers. Then choose ,**All Customers**.
2. Find the customer in the list. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose **Wish List**. Then, find the item to be edited in the list. Any options selected for the product appear below the product name.

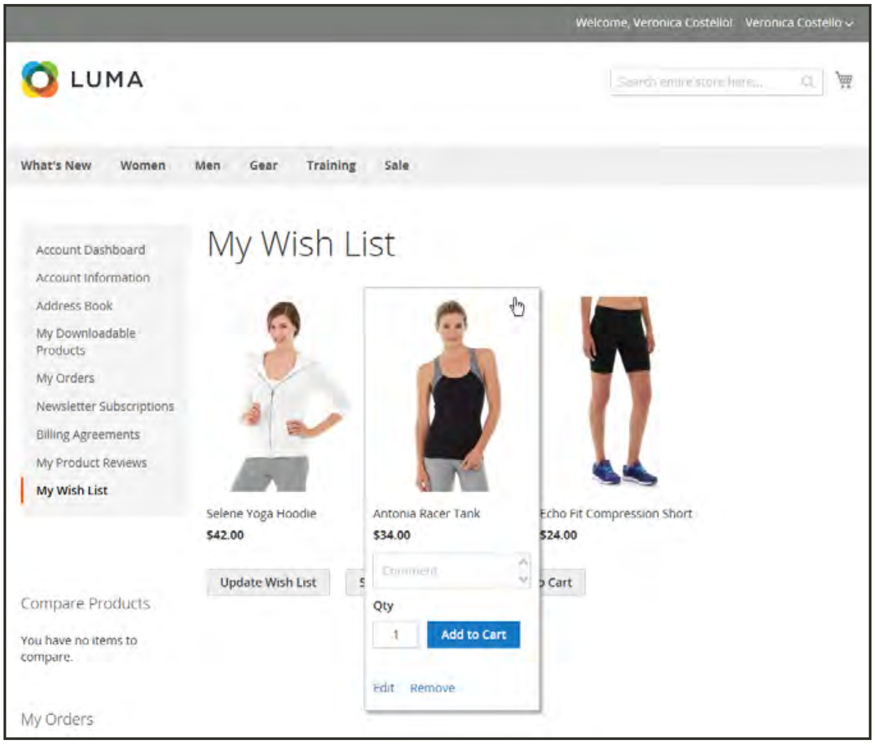


Wish List from Admin

4. To edit the product options, do the following:
   a. In the **Action** column, click **Configure**.
   b. Click **Configure**.
   c. On the product page, update the options and **Quantity** as needed.
5. When complete, tap **Update Wishlist**.

Sharing a Wish List

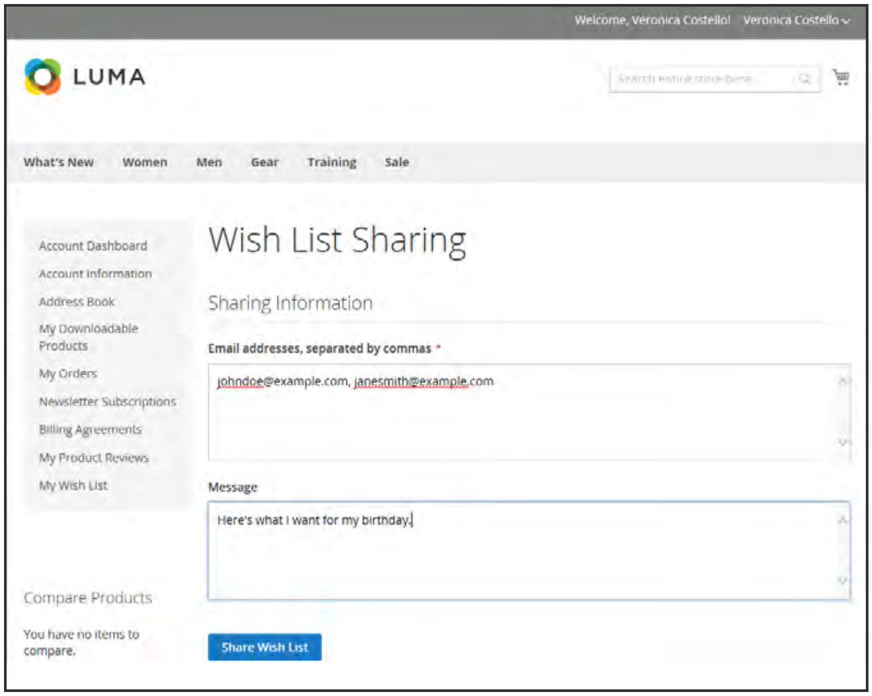
Customers can manage their wish lists from the dashboard of their accounts. Store administrators can also help customers manage their wish lists from the Admin.



Customer Dashboard with Wish List

To share your wish list:

1. In the panel on the left of your customer account dashboard, choose **My Wish List**.
2. To add a comment to an item, hover over the image, and enter your **Comment** in the box.
3. To share your wish list, do the following:
   a. Tap **Share My Wish List**.
   b. Enter the email address of each recipient, separated by a comma.
   c. Enter a **Message** for the body of the email.
4. When you're ready to send the message, tap **Share Wish List**.



Customer Dashboard with Wish List

To transfer an item to your cart:

1. To add a single item, do the following:

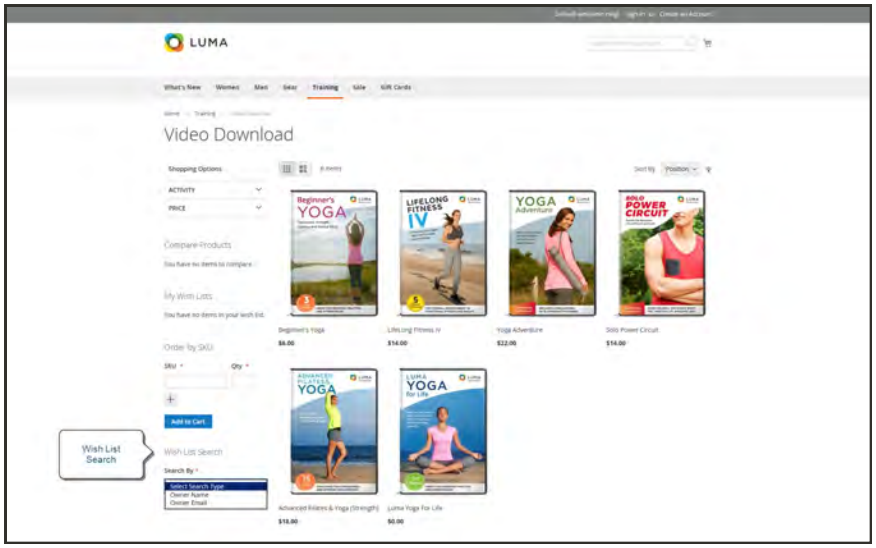
   a. Hover over the item., and enter the **Qty** that you want to add to the cart.

   b. Tap **Add to Cart**.

2. To transfer all wish list items to the cart, tap **Add All to Cart**.

Wish List Search

Any public wish list can be found using the Wish List Search widget. The widget enables a customer to search by the name or email address of the wish list owner. Store customers can find wish lists that belong to other customers, view them and order products from them, or add the products to their own wish lists. If an item it purchased from a public wish list by another customer, it is not removed from the original wish list. The Wish List Search widget can be added to any page of your store to make it easy for customers to find the wish lists of friends and family members.



Wish List Search

To add a Wish List Search widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.

2. In the upper-right corner, tap **Add Widget**. Then, in the **Settings** section, do the following:

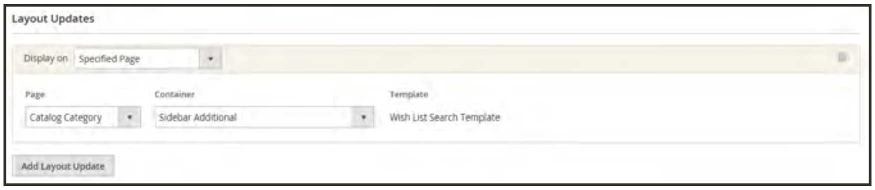
   a. Set **Type** to “Wishlist Search.”

   b. Set **Design Package/Theme** to the theme of the store where the wishlist will be added.

   c. Enter the **Widget Title**.

   d. Set **Assign to Store Views** to the view or website where the widget is to be used.

   e. In the **Layout Updates** section, tap **Add Layout Update**. Then, specify where you want the widget to appear.



Layout Update

3. In the panel on the left, choose **Widget Options**. Then, do the following:
4. Set **Quick Search Form Types** to one of the following:

All Forms	Customers can search by all available parameters.
Owner Name	Customers can search for wish lists by owner name.
Owner Email	Customers can search for wish lists by owner email address.

> Shipping addresses are not included in wish lists.

5. Configure the remaining widget properties as needed, following the standard instructions.
6. When complete, tap **Save**.
7. When prompted, refresh all invalid caches.

Product Relationships

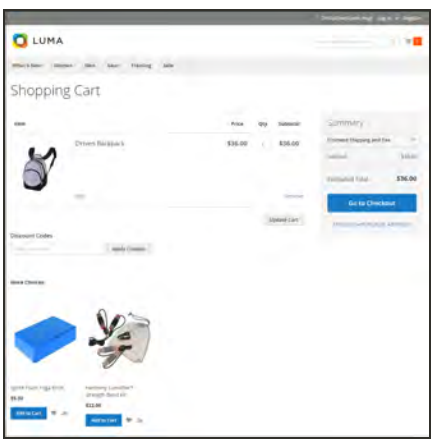
Products in your catalog can be promoted on other pages by defining the nature of the relationship between the products. The options available are: Up-sell products, Related products, and Cross-sell products.

Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. They complement, enhance, or add optional features to the product.

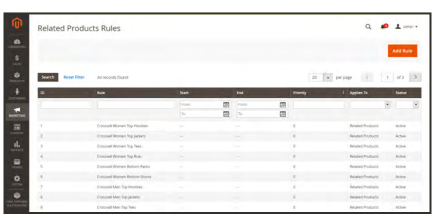
Up-sells

Up-sell products are items that are similar, but are perhaps of a higher-quality, more popular, or have a better profit margin than the item the customer is considering.



Cross-sells

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



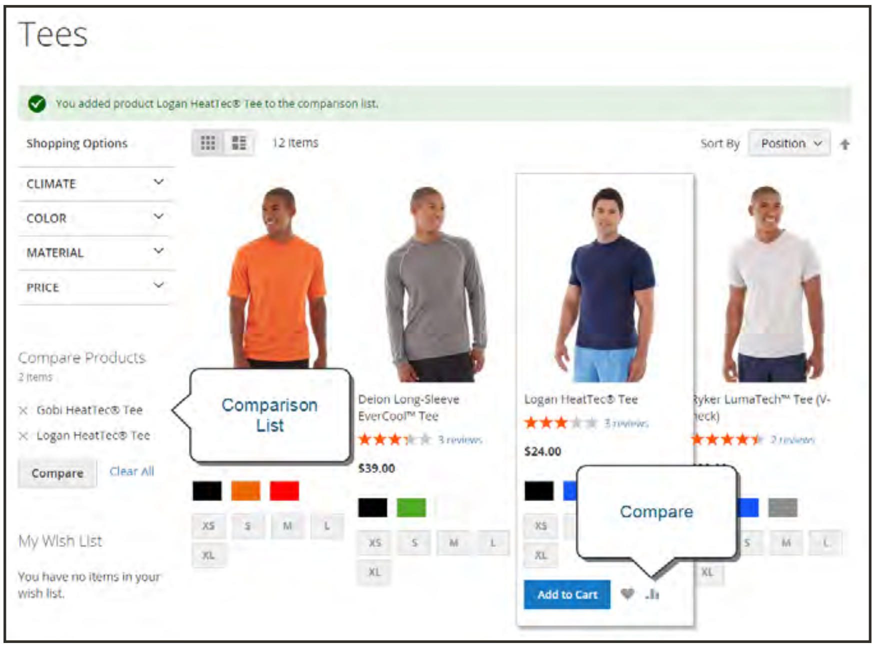
Related Product Rules

Related product rules give you the ability to target the selection of products that are presented to customers as related products, up-sells, and cross-sells.

Compare Products

Compare Products generates a detailed, side-by-side comparison of two or more products. Depending on the theme, the Add to Compare link might be represented by an icon or text. The Compare Products block usually appears in either the left or right sidebar of a catalog page.

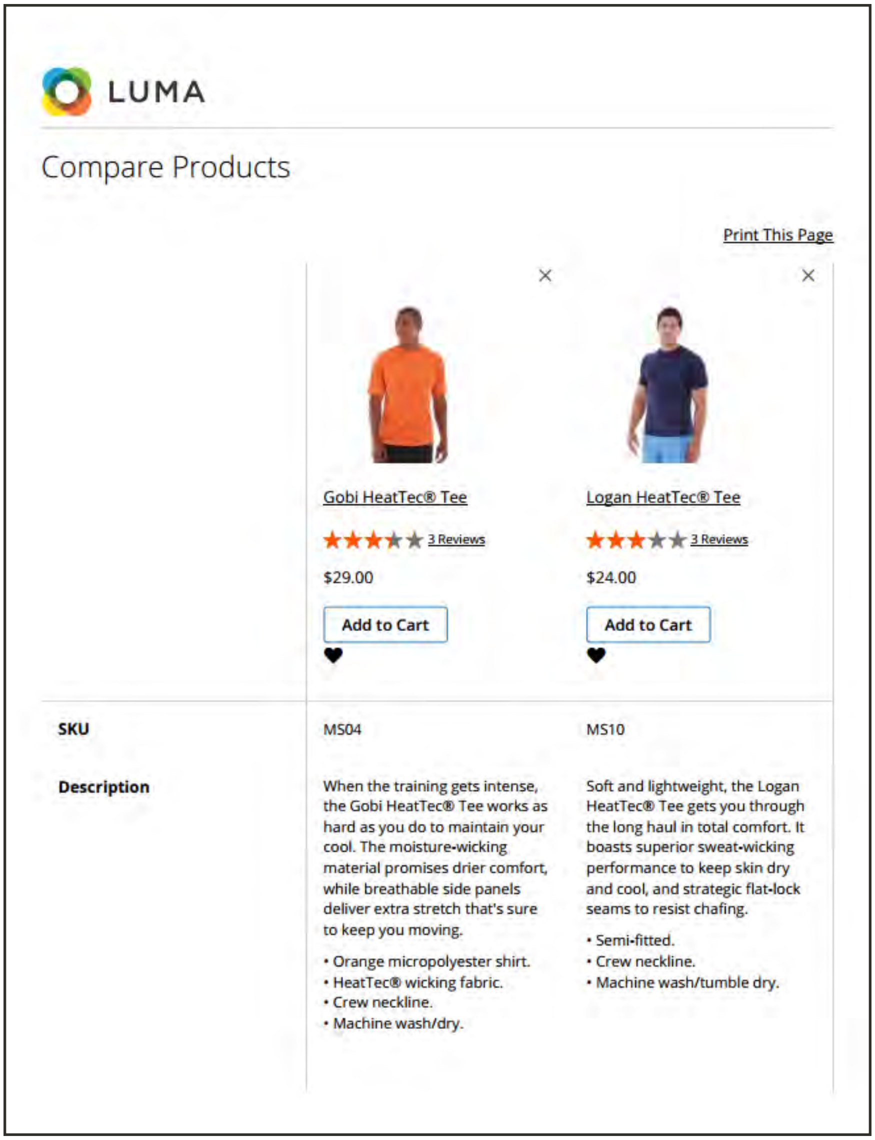
Unlike the Recently Viewed / Compared Products block, the Admin does not include additional configuration settings for Compare Products.



Compare Products

To compare products:

1. From your storefront, find the products that you want to compare, and click the **Compare** link for each.
2. Depending on the theme and page layout, there might be a Compare Products block in the sidebar. If so, you can mark the checkbox of the products to include in the report, and tap **Compare**. The Compare Products report opens in a new window.
3. To print the report, tap **Print This Page**.
4. After navigating to other pages, you can click the link in the header or sidebar to return to the report.
   - To remove a single product from the report, tap **Delete** (×).
   - To remove all products from the report, click the **Clear All** link.



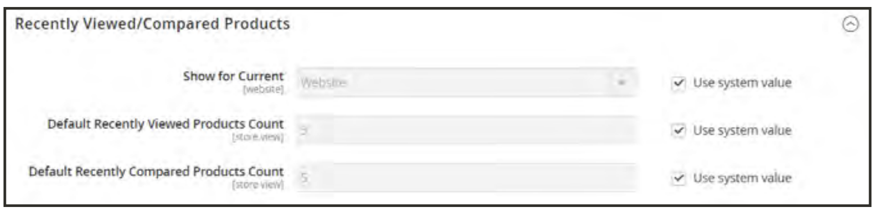
Compare Products

Recently Viewed / Compared Products

The Recently Viewed and Recently Compared blocks usually appear in the right sidebar of a catalog page. The number of products listed in each block can be configured for each website, store, or store view.

To configure Recently Viewed/Compared Products:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Recently Viewed/Compared Products** section. Then, do the following:



Recently Viewed/Compared Products

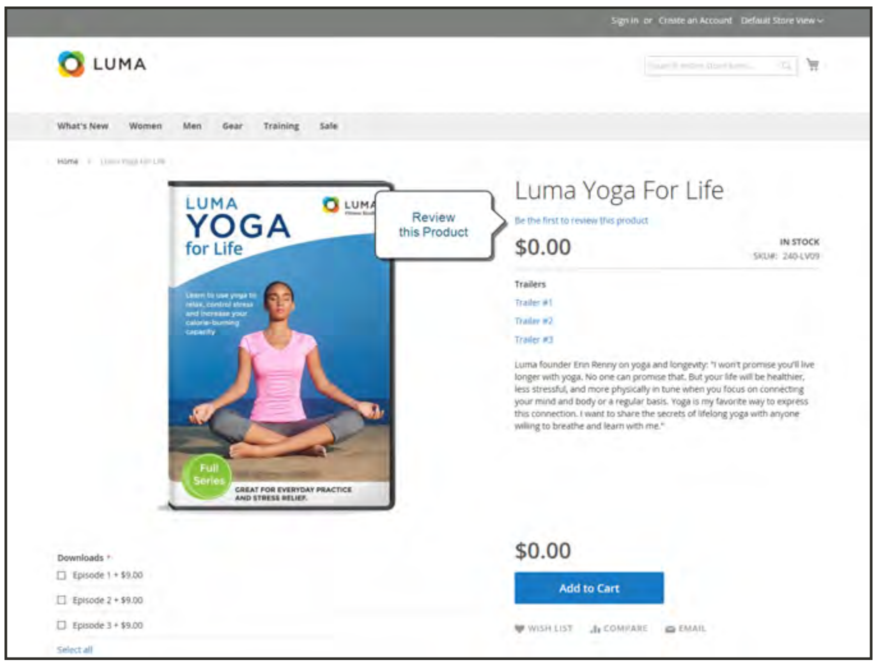
   a. Set **Show for Current** to the website, store, or store view where the configuration applies.
   b. In the **Default Recently Viewed Products Count** field, enter the number of recently viewed products to appear in the list.
   c. In the **Default Recently Compared Products Count**, enter the number of recently compared products to appear in the list.

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

Product Reviews

Product reviews help to build a sense of community, and are considered more credible than any advertising money can buy. In fact, some search engines give sites with product reviews a higher ranking than those without. For those who find your site by searching for a specific product, a product review is essentially the landing page of your store. Product reviews help people find your store, keep them engaged, and often lead to sales.

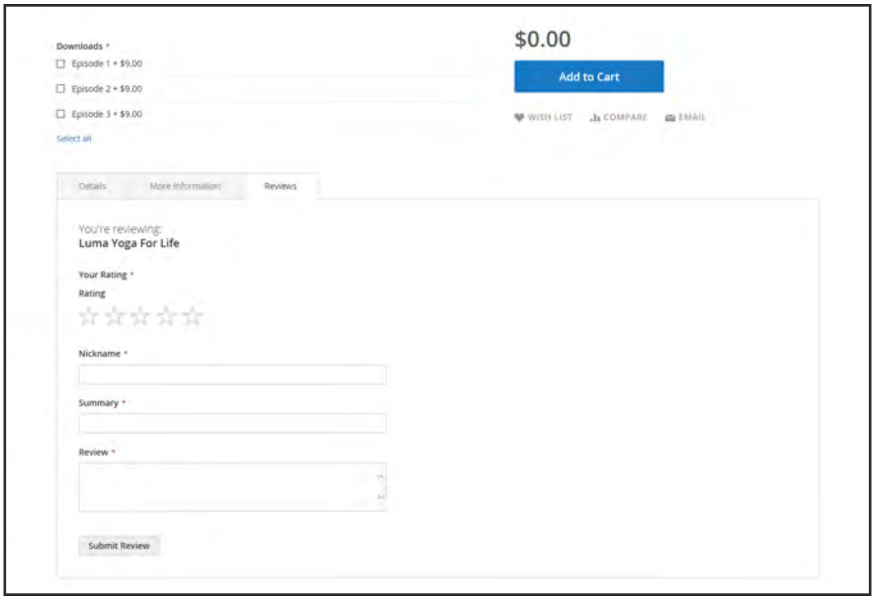
The configuration determines whether customers must open an account with your store before writing product reviews, or if they can submit reviews as guests. Requiring reviewers to open an account prevents anonymous submissions, and improves the quality of reviews.



Add Your Review

Customers can write reviews for any product in your catalog. Reviews can be written from the product page by clicking the “Add Your Review” link. For products that haven't been reviewed, the link says, “Be the first to review this product.” The Reviews tab lists all current reviews, and the form that is used to submit a review.

The number of stars indicates the satisfaction rating. Visitors can click the link to read the reviews and write their own. As an incentive, customers can receive reward points for submitting a review. When a review is submitted, it is sent to the Admin for moderation. When approved, the review is published in your store.



Reviews Tab

To configure product reviews:

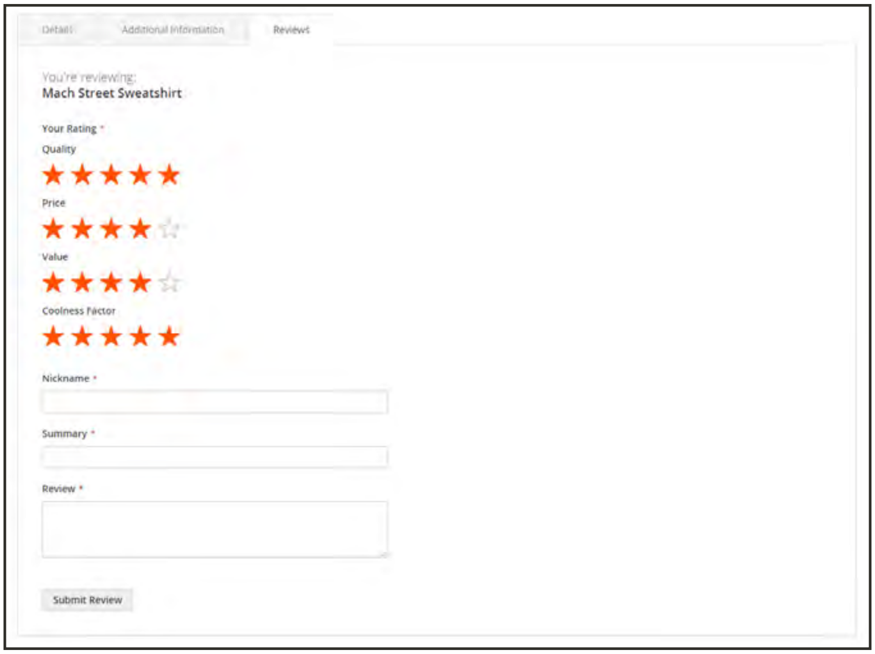
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, select **Catalog**.
3. Expand the **Product Reviews** section.
4. Set **Allow Guests to Write Reviews** according to your preference.
5. When complete, tap **Save Config**.

To moderate reviews:

1. On the Admin sidebar, tap **Marketing**. Then under **User Content,** choose **Reviews**.
2. In the list, click a pending review to view the details, and edit if necessary.
3. To approve a pending review, change the **Status** from “Pending” to “Approved.” To reject a review, select “Not Approved.”
4. When complete, tap **Save Review**.

Ratings

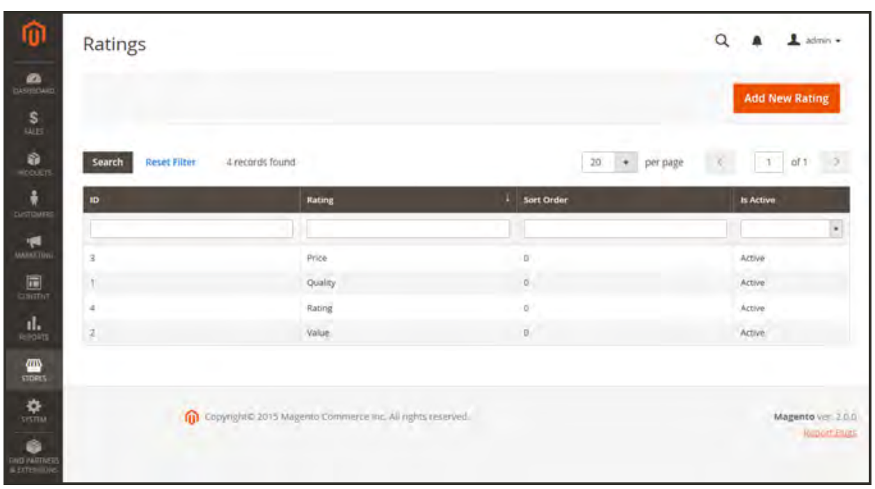
When customers review a product, the default ratings are quality, price, and value. In addition to these, you can add your own custom ratings. The five-star ratings that appear on catalog pages are averaged for each product.



Ratings

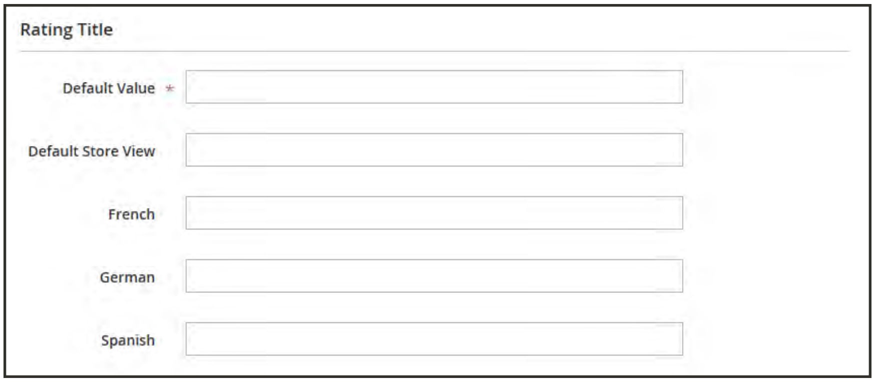
To create your own ratings:

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.)

   Ratings are not visible unless assigned to a store view.

5. In the **Sort Order** field, enter a number to determine the order of this rating when listed with others.

Rating Visibility

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

Promotions

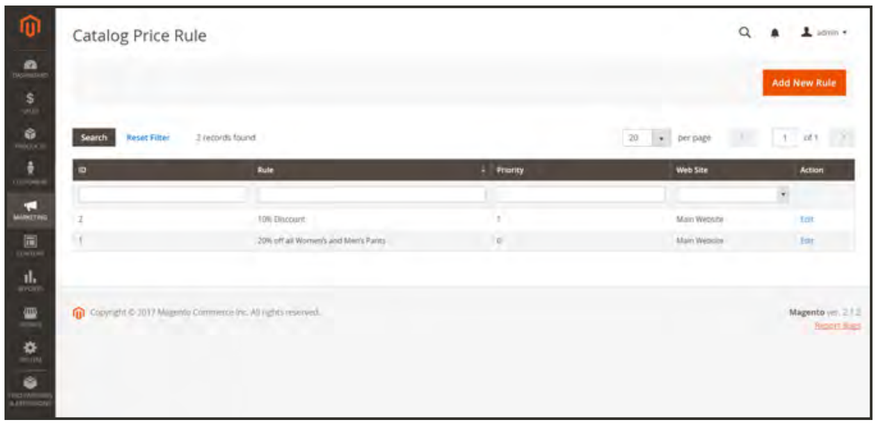
Contents

In this section of the guide, you will learn how to set up product relationships, and use price rules to trigger discounts based on a variety of conditions.

CHAPTER 22:

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: Add Related Banners (Optional)

Step 5: Schedule the Rule

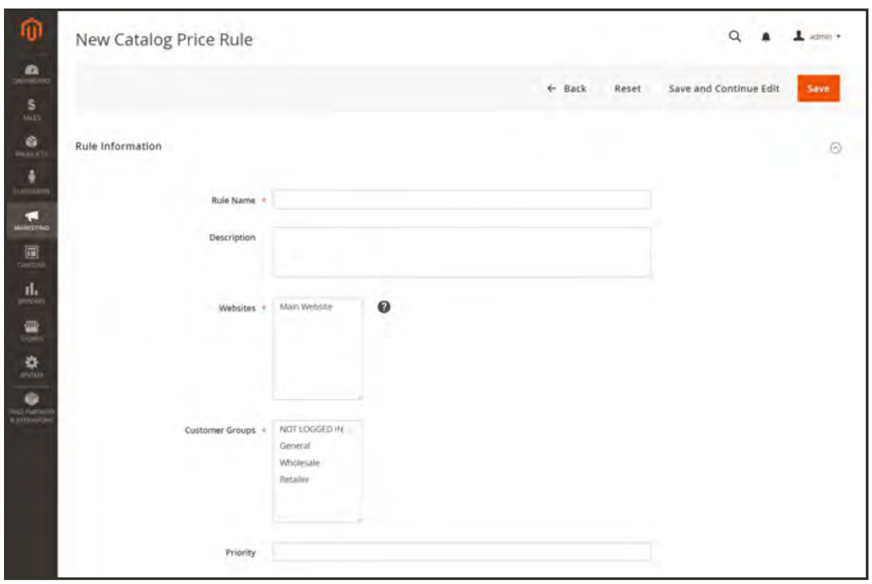
Step 6: Save and Test the Rule

Step 1: Add a New Rule

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

2. In the upper-right corner, tap **Add New Rule**.

   The form opens to the Rule Information section, with expandable sections below for Conditions and Actions.



Rule Information

3. In the **Rule Information** section, do the following:

   a. Complete the **Rule Name** and **Description** fields. These fields are for your internal reference only.

   b. Select the **Websites** where the rule is to be available.

   c. Select the **Customer Groups** to which this rule applies.

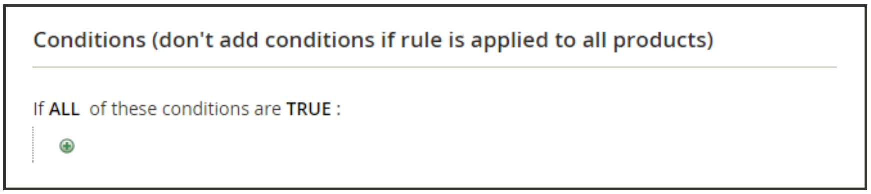
   To choose multiple groups, hold down the Ctrl key, and click each option.

d. Enter a number to establish the **Priority** of this rule in relation to other rules.

Step 2: Define the Conditions

Most of the available conditions are based upon existing attribute values. To apply the rule to all products, leave the conditions blank.

1. Scroll down to **Conditions**, and expand the section. The first rule begins:



Condition - Line 1

The statement has two bold links, which when tapped, display the options for that part of the statement. If you save the condition without making additional selections, the rule applies to all products.

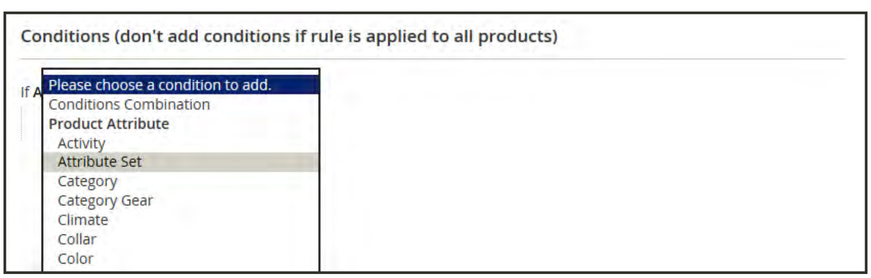
- Tap the **ALL** link, and chose either “ALL” or “ANY.”
- Tap the **TRUE** link, and choose either “TRUE” or “FALSE.”
- To apply the rule to all products, leave the condition unchanged.

You can create different conditions by changing the combination of these values. For this example, the following condition is used:

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

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

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



Condition Line 2, Part 1

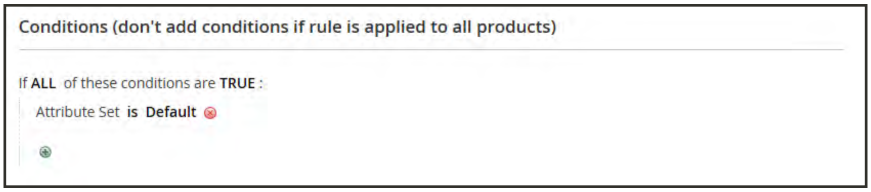
> For an attribute to appear in the list, it must be configured to be used in promo rule conditions. To learn more, see: Product Attributes.

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

```
If ALL of these conditions are TRUE:

Attribute Set is …
```

b. Tap the **is** link, and choose the comparison operator that describes the condition to be met. In this example, the options are "is" and "is not."

c. Tap the (...) "more" link, and choose the attribute set upon which the condition is based.



Condition Line 2, Part 3

The selected item appears in the statement to complete the condition.

```
If ALL of these conditions are TRUE:

Attribute Set is Default
```

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

- Conditions Combination
- Product Attribute

Then, repeat the process until the condition is complete.

If at any time you want to delete part of the statement, tap the **Delete** ( ) button at the end of the line.

Step 3: Define the Actions

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

Actions

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

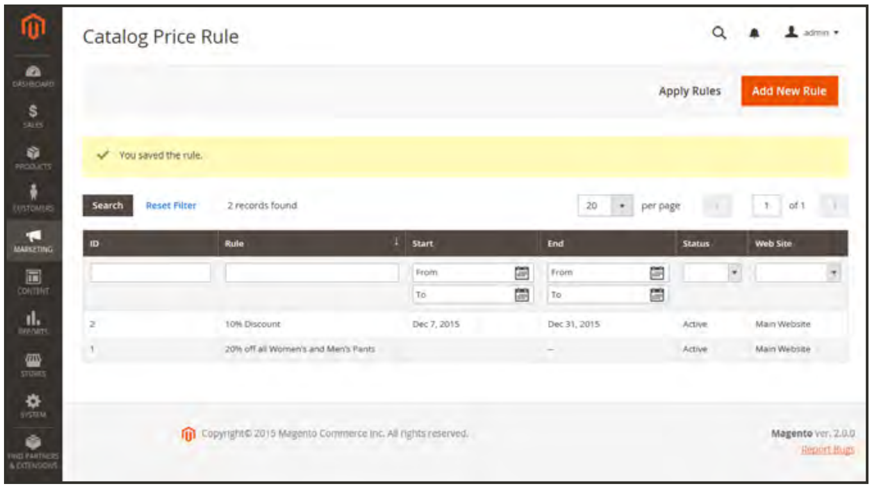
Apply as percentage of original	Discounts item by subtracting a percentage of the regular* price. For example: Enter 10 in Discount Amount for an final** price that is marked down 10% from the regular price.
Apply as fixed amount	Discounts item by subtracting a fixed amount from the regular price. For example: Enter 10 in Discount Amount for a final price that is $10 less than the regular price.
Adjust final price to this percentage	Adjusts the final price by a percentage of the regular price. For example: Enter 50 in Discount Amount for a final price that is marked down 50% from the regular price.
Adjust final price to discount value	Sets the final price to a fixed, discounted amount. For example: Enter 20 in Discount Amount for a final price of $20.00.

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

** Final price refers to the discounted price that appears in the shopping cart.

3. Enter the **Discount Amount**.

4. To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** to "Yes." This safeguard prevents customers from receiving multiple discounts for the same product.



Pricing Structure Rules

Step 4: Add Related Banners (optional)

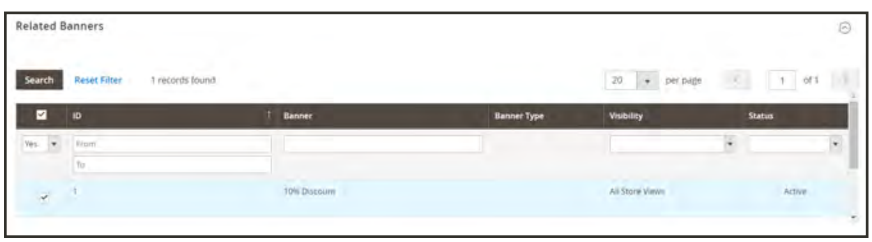
Banners that are associated with the rule appear in the storefront whenever the conditions are met.

1. Expand the **Related Banners** section.

2. Use the search filters to locate the banner(s) that you want to associate with the rule.

3. Mark the checkbox in the first column to associate the banner with the rule.

   To learn more, see: Using Banners in Price Rules.



Related Banners

Step 5: Schedule the Rule

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

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

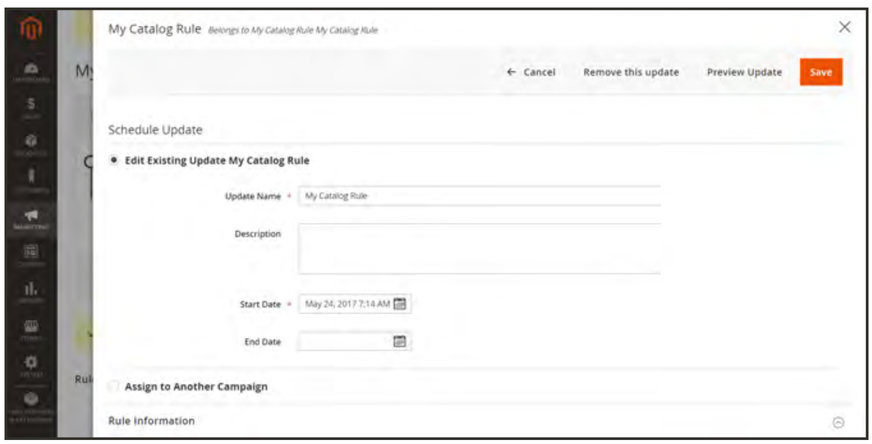
Scheduled Changes

2. In the Scheduled Changes box, click **View/Edit**.

   You can either edit the existing update, or assign the catalog price rule to another campaign. The Edit Existing Update option is selected by default.

3. To schedule the rule, enter the **Start Date** and **End Date** that the price rule is to be active. You can either enter the dates, or choose the dates from the **Calendar** ( ).

   To learn more, see: Scheduled Changes for Catalog Price Rules.



Update Schedule

Step 6: Save and Test the Rule

1. When complete, tap **Save Rule**.

2. Test the rule to make sure that it works correctly.

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

Field Descriptions

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.
Websites	(Required) Identifies the websites where the rule can be used.
Customer Groups	(Required) Identifies the customer groups to which the rule applies.
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.
CONDITIONS	
	Specifies the conditions that must be met before the catalog price rule goes into action. If left blank, the rule applies to all products.
ACTIONS	
Apply	Determines the type of calculation that is applied to the purchase. Options: **Apply as percentage of original:** Discounts item by subtracting a percentage of the regular* price. **Apply as fixed amount:** Discounts item by subtracting a fixed amount from the regular price. **Adjust final price to this percentage:** Adjusts the final price by a percentage of the regular price. **Adjust final price to discount value:** Sets the final price to a fixed, discounted amount. *Regular price refers to the base product price without any advanced pricing (special/tier/group) or promotional discounts. **Final price refers to the discounted price that appears in the shopping cart.
Discount Amount	(Required) The amount of discount that is offered.

Field Descriptions (cont.)

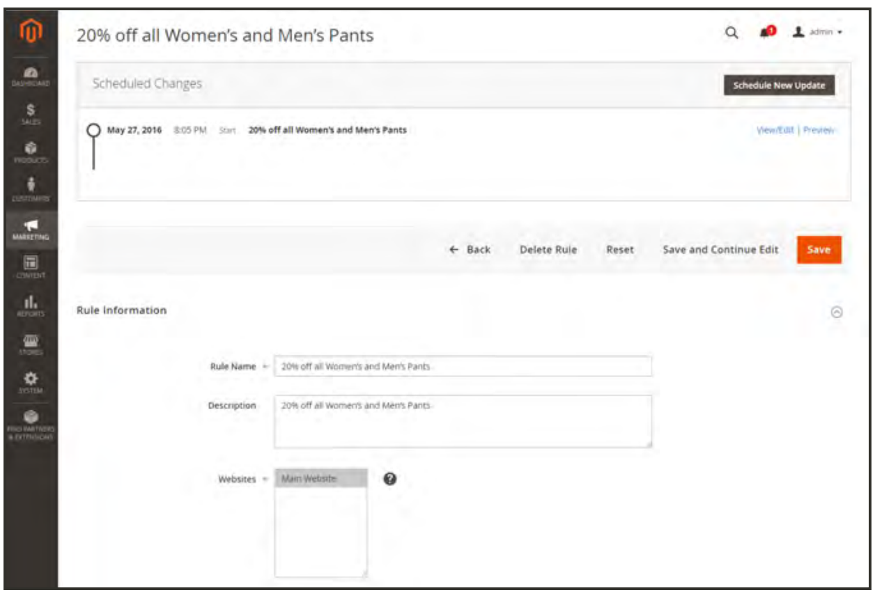
FIELD	DESCRIPTION
Discard Subsequent Rules	Determines if additional rules can be applied to this purchase. To prevent multiple discounts from being applied to the same purchase, select “Yes.” Options: Yes / No
RELATED BANNERS	
	Identifies any banner(s) that are associated with the rule.

Scheduled Changes for Catalog Price Rules

The Scheduled Changes box appears at the top of the page when a new price rule is saved for the first time. Catalog price rules can be applied on schedule as part of a campaign, and grouped with other content changes. You can create a new campaign based on scheduled changes to a price rule, or apply the changes to an existing campaign.

If there are multiple price rules running in the same campaign, the Priority setting of the price rule determines which rule takes precedence. To learn more, see: Content Staging.

> If a campaign that includes a price rule is initially created without an end date, the campaign cannot later be edited to include an end date. It is recommended that you either add an end date when you create the campaign, or create a duplicate version of the existing campaign and add the end date to the duplicate as needed.



Scheduled Changes

Price Rule with Multiple SKUs

A single price rule can be applied to multiple SKUs, which makes it possible to create a variety of promotions based on a product, brand, or category.

Step 1: Verify Storefront Properties of Attribute

Before you begin, make sure that the Storefront Properties of the SKU attribute are set to "Use in Promo Rules."

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. In the search filter at the top of the **Attribute** Column, enter "sku." Then, tap **Search**.
3. Click to open the attribute in edit mode.
4. In the panel on the left, choose **Storefront Properties**. Then, make sure that **Use for Promo Rule Conditions** is set to "Yes,"
5. If you changed the value of the property, tap **Save Attribute**.

Step 2: Apply a Price Rule to Multiple SKUs

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Do one of the following:
   - Follow the instructions to create a cart price rule.
   - Open an existing cart price rule.
3. Expand the **Conditions** section, and do the following:

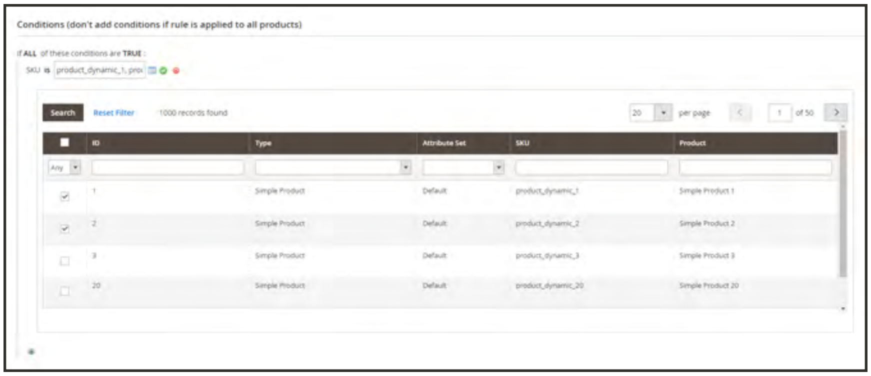
   a. In the first line, set the first parameter to "ANY."

If ANY of these conditions are TRUE

   b. Tap **Add** ( ) at the beginning of the next line. Then, in the list under **Product Attribute**, choose **SKU**.

SKU is ...

   c. To complete the condition, click the (...) "more" link. Then, tap the **Chooser** button for the list of available products.



Choose Each SKU

d. In the list, mark the checkbox of each product that is to be included. Then, tap **Save and Apply** to add the SKUs to the condition.

Multiple SKUs Added to Condition

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

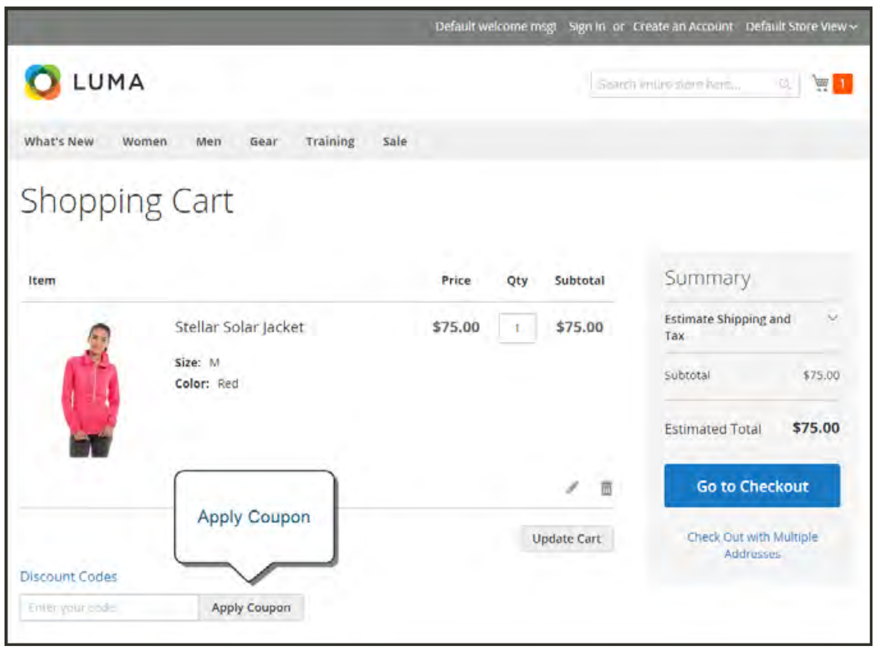
5. When complete, tap **Save**.

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

CHAPTER 23:

Cart Price Rules

Cart price rules apply discounts to items in the shopping cart, based on a set of conditions. The discount can be applied automatically as soon as the conditions are met, or when the customer enters a valid coupon code. When applied, the discount appears in the cart under the subtotal. A cart price rule can be used as needed for a season or promotion by changing its status and date range.



Apply Coupon in Cart

Creating a Cart Price Rule

Complete the following steps to add a new rule, describe the conditions, and define the actions. Then, complete the labels, and test the rule.

Process Overview:

Step 1: Add a New Rule

Step 2: Describe the Conditions

Step 3: Define the Actions

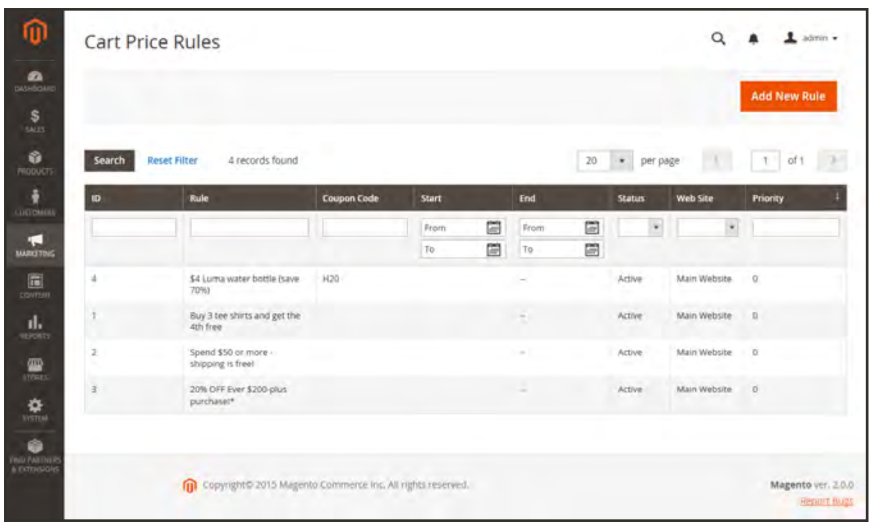
Step 4: Complete the Labels

Step 5: Add Related Banners

Step 1: Add a New Rule

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

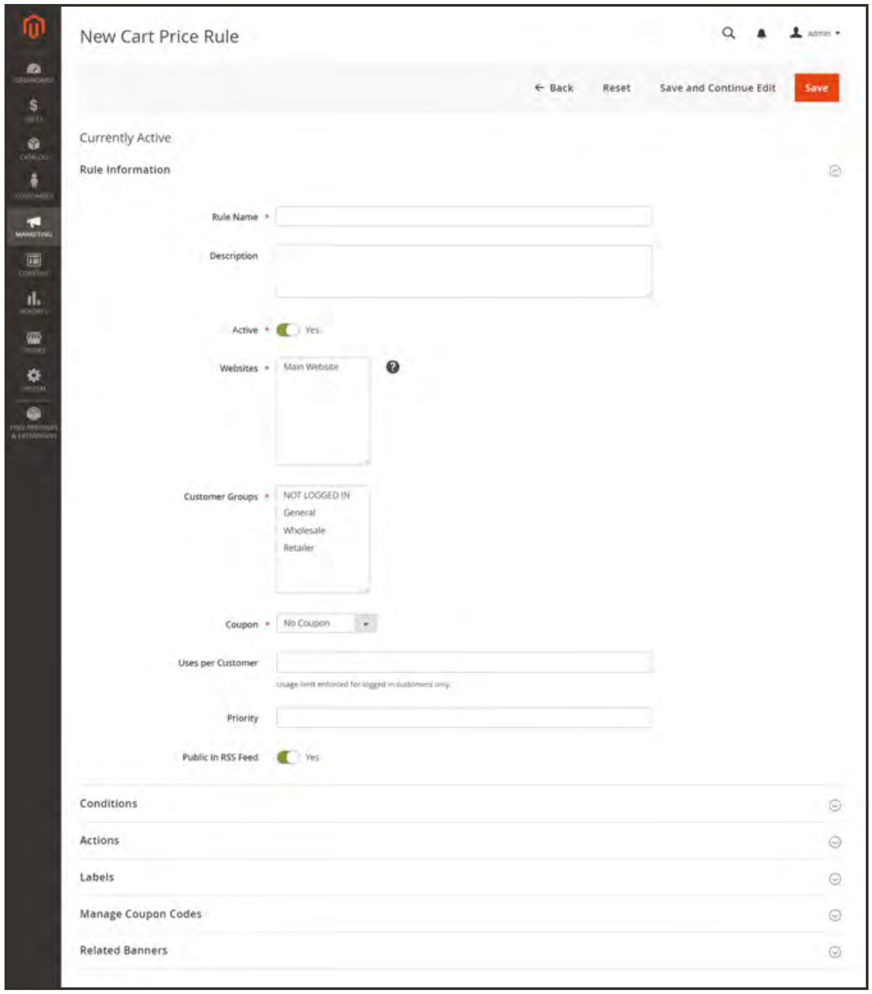
2. Tap **Add New Rule**. Then, do the following:



Cart Price Rules

a. Under **Rule Information**, complete the **Rule Name** and **Description**.

b. If you do not want the rule to go into effect immediately, set **Active** to “No.”



Rule Information

3. To establish the scope of the rule, do the following:

   a. Select the **Websites** where the promotion is to be available.

   b. Select the **Customer Groups** to which the promotion applies.

      - If you want the promotion to be available only to registered customers, do not choose the “NOT LOGGED IN” option.

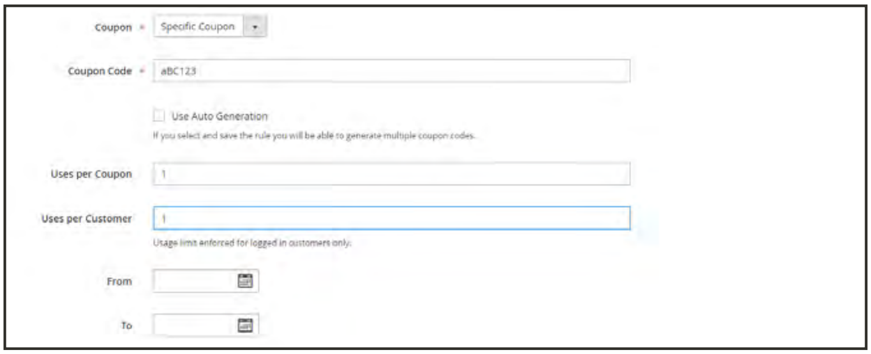
4. To associate a coupon with the price rule, set **Coupon** to “Specific Coupon.” Then, do the following:

   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.

To learn more, see: Coupon Codes.



Coupon Settings

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

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

7. This is a good time to save your work. Tap **Save and Continue Edit**.

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

Scheduled Changes

Step 2: Describe the Conditions

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

Conditions

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

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

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

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

2. Click **Add** ( ) at the beginning of the next line. For this example, complete the next part of the condition as follows:

   a. When prompted to **Choose the condition to add**, choose "Products Subselection."

Products Subselection

   b. When the next part of the condition appears, mouse over the line so you can see where each link with variable values is located.

If ALL of thes conditions are TRUE

c. Click the "more" (...) link, and enter ">100." This condition requires the total quantity of the cart to be greater than 100.

Total Quantity Value

3. Click **Add** ( ) at the beginning of the next line. Then add a condition that is based on **Category**.

Category

a. In the next part of the condition, click the "**more**" (...) link to display the input field. Then, open the **Chooser** ( ) to display the category tree.

b. Mark the checkbox of the category that you want to use as a condition for the price rule.

The condition can be based on any category that is a child of the store's root category.

Choosing a Category for a Condition

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

   You can repeat the process as many times as needed to describe the conditions that must be met for the price rule . Here are some examples:

Example 1: Regional Price Rule

To create a regional price rule, use one of the following cart attributes:

- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

Example 2: Shopping Cart Totals

To base the condition on shopping cart totals, use one of the following cart attributes:

- Subtotal
- Total Items Quantity
- Total Weight

Step 3: Define the Actions

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

1. Scroll down to **Actions**, and expand the section. Then, do the following:

Cart Price Rule Actions

   a. Set **Apply** to one of the following discount options:

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

   b. Enter the **Discount Amount** as a number, without symbols. For example, depending on the discount option selected, the number 10 might indicate a percentage, a fixed amount, or a quantity of items.

   c. For a "Buy X get Y Free" discount, enter the quantity in the **Discount Qty Step (Buy X)** field that the customer must purchase to receive the discount.

   d. In the **Maximum Qty Discount is Applied To** field, enter the maximum quantity of the same product that can qualify for the discount in the same purchase.

   e. Set **Apply to Shipping Amount** ( ) as follows:

Yes	Applies the discount amount to the subtotal and shopping amounts separately.
No	Applies the discount amount only to the subtotal.

f. To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** ( ) to “Yes.” This safeguard prevents customers from receiving multiple discounts for the same product.

g. To determine if free shipping is applied to orders that meet the conditions, set **Free Shipping** to one of the following:

No	Free shipping is not available.
For matching items only	Free shipping is available only for items that match the conditions of the rule.
For shipment with matching items	Free shipping is available for any shipment that includes matching item(s).

h. In the **Add Rewards Points** field, enter the number of points the customer earns whenever the cart price rule is applied. (If reward points aren’t enabled, leave this field blank.)

2. Define as many additional conditions as needed for the action.

3. When complete, tap **Save and Continue Edit**.

Step 4: Complete the Labels

The label appears in the totals section of the order to identify the discount. The label text is enclosed in parentheses, after the word, “Discount”. You can enter a default label for all store views, or enter a different label for each view.

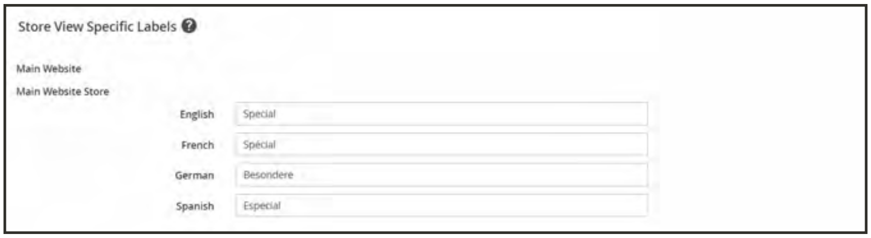
Discount Label in Totals Section of Order

1. Scroll down to **Labels**, and expand the section.

2. Enter the text that you want used as the **Default Rule Label for All Store Views**.

Default Label

3. If your store has multiple views, or multiple websites with multiple views, enter the appropriate label text for each. For example, if each store view is in a different language, enter the translation of the label for each view.



Step 5: Add Related Banners (optional)

Banners that are associated with the rule appear in the storefront whenever the conditions are met.

1. Expand the **Related Banners** section.
2. Use the search filters to locate the banner(s) that you want to associate with the rule.
3. Mark the checkbox in the first column to associate the banner with the rule.

   To learn more, see: Using Banners in Price Rules.

Step 6: Save and Test the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

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

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.
Active	(Required) Determines if the rule is currently active in the store. Options: Yes / No
Websites	(Required) Identifies the websites where the rule can be used.
Customer Groups	(Required) Identifies the customer groups to which the rule applies.
Coupon	(Required) Indicates if a coupon is associated with the rule. Options: **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 Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any selected customer group. Does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. For no limit, leave blank.
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.

Field Descriptions (cont.)

FIELD	DESCRIPTION	
Public in RSS Feed	Determines if the promotion is included in your store's public RSS feed. Options: Yes / No.	
CONDITIONS		
	Specifies the conditions that must be met before the cart price rule goes into action. If left blank, the rule applies to all products in the cart.	
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.
	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.	

Field Descriptions (cont.)

FIELD	DESCRIPTION
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
Free Shipping	Determines if free shipping is included in the promotion, and if so, for which items. Options: **No** — Free shipping is not available when a coupon that is based on the rule is used. **For matching items only** — Free shipping is available only for specific items in the cart that match the rule. **For shipment with matching items** — Free shipping is available for the entire cart when a coupon that is based on the rule is used.
Add Reward Points	Specifies the number of reward points that are earned by the customer whenever the price rule is applied.
LABELS	
Default Rule Label for All Store Views	A default label that identifies the discount and can be used for all store views.
Store View Specific Labels	If applicable, specifies a different label to identify the discount for each store view.
RELATED BANNERS	
	Identifies any banner(s) that are associated with the rule.

Coupon Codes

Coupons codes are used with cart price rules to apply a discount when a set of conditions is met. For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount. To apply the coupon to a purchase, the customer can enter the coupon code in the cart, or possibly at the cash register of your "brick and mortar" store. Here are a few ways that you can use coupons in your store:

- Email coupons to customers
- Produce printed coupons
- Create in-store coupons for mobile users

Coupon codes can be sent by email, or included in newsletters, catalogs, and advertisements. The list of coupon codes can be exported and sent to a commercial printer. You can also create in-store coupons with a quick response code that shoppers can scan with their smart phones. The QR code can link to a page on your site with more information about the promotion.

Method 1: Create a Specific Coupon

1. Follow the instructions to create a cart price rule.
2. On the General Information page, set **Coupon** to "Specific Coupon."
   a. Enter a **Coupon Code** to be used with the promotion.

      The format of the code as numeric, alphanumeric or alphabetical is determined by the configuration.

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

      - Uses per Coupon
      - Uses per Customer

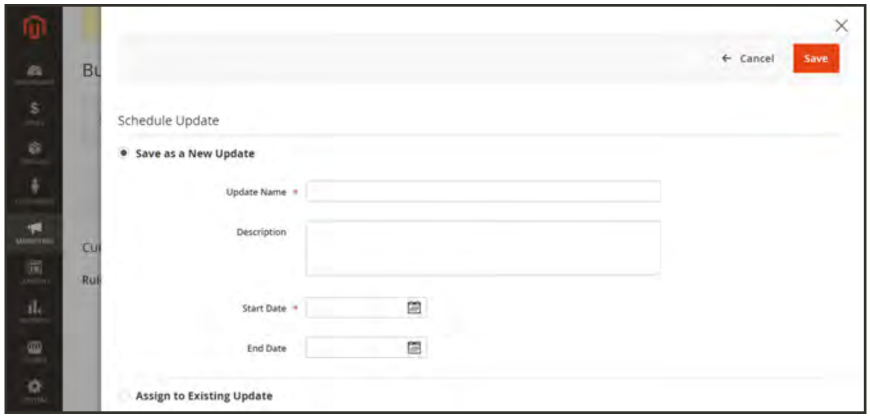
      For unlimited use, leave these fields blank.

Coupon Information

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

Schedule New Update

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



Schedule Update

2. Enter the **Update Name** and **Description**.
3. Choose the **Start Date** and **End Date** from the Calendar ( ). If you leave the date range empty, the rule will not expire.
4. When complete, tap **Save**.

Scheduled Change

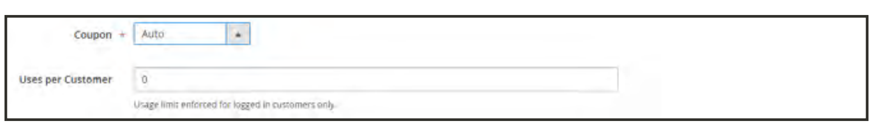
Assign to Existing Update

1. Select **Assign to Another Update**.
2. Find the update in the list, and tap **Select**.

4. Complete the cart price rule as needed.

Method 2: Generate a Batch of Coupons

1. Follow the instructions to create a cart price rule.
2. Under **Coupon Code**, mark the **Use Auto Generation** checkbox.
3. To limit the number of times each customer can use the coupon, enter the number of **Uses per Customer**.



Generate Auto-numbered Coupons

4. Scroll down and expand the **Manage Coupon Codes** section. Then, do the following:

   a. In the **Coupons Qty** field, enter the number of coupons that you want to generate.

   b. Enter the **Code Length**, not including the prefix, suffix, or separators.

   c. Set the **Code Format** to one of the following:

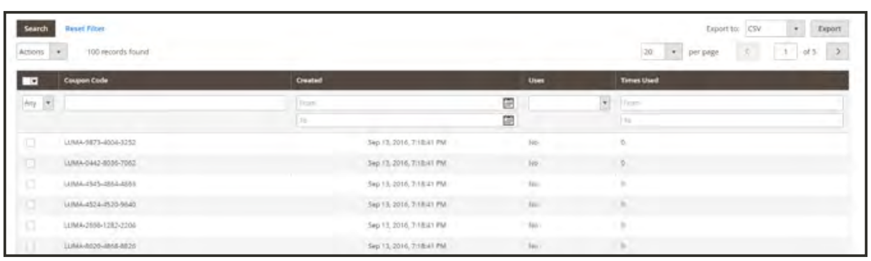
      - Alphanumeric
      - Alphabetical
      - Numeric

   d. (Optional) Enter a **Code Prefix** to be added to the beginning of the code.

   e. (Optional) Enter a **Code Suffix** to be added to the end of the code.

   f. (Optional) In the **Dash Every X Characters** field, enter the number of characters between each dash. For example, if the code is twelve characters long, and there is a dash every four characters, it will look like this: xxxx-xxxx-xxxx. Dashes make codes easier to read and enter.

5. When complete, tap **Generate**. The list of generated codes appears below.



Generated Codes

Configuring Coupon Codes

The length and format of automatically generated coupon codes is controlled by the configuration. The characters can be set to all numbers, all letters, or a combination. You can insert a dash at set intervals to make it easy to read, and add a .prefix and suffix to associate the code iith a specific campaign or initiative.

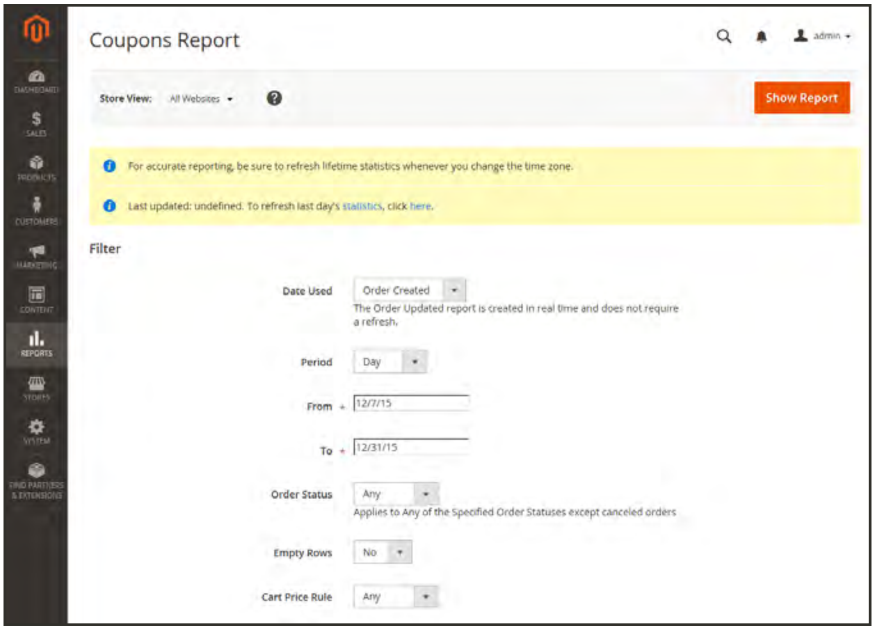
Auto Generated Specific Coupon Codes

To format coupon codes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Promotions**.
3. In the **Auto Generated Specific Coupon Codes** section, do the following:
   a. Enter the **Code Length**, including prefix, sufix, and separators.
   b. Set the **Code Format** to one of the following:
      - Alphanumeric
      - Alphabetical
      - Numeric
   c. To add a **Code Prefix**, enter the value that you want to appear at the beginning of all coupon codes.
   d. To add a **Code Suffix**, enter the value that you want to appear at the end of all coupon codes.
   e. To insert a **Dash Every X Characters**, enter the number of characters between each dash. Coupon codes with different dash patterns are considered to be different codes, even if the numbers are the same.
4. When complete, tap **Save Config**.

Coupons Report

The Coupons Report can be filtered for a specific store view, time period, order status, and price rule.



Coupon Report Filters

To run the report:

1. On the Admin sidebar, tap **Reports**. Then under **Sales** choose **Coupons**.
2. If you have multiple store views, set **Store View** in the upper-left corner to establish the scope of the report.
3. To refresh the sales statistics for the day, click the message at the top of the workspace.
4. To filter the data, do the following:
   a. Set **Date Used** to one of the following:
      - Order Created
      - Order Updated

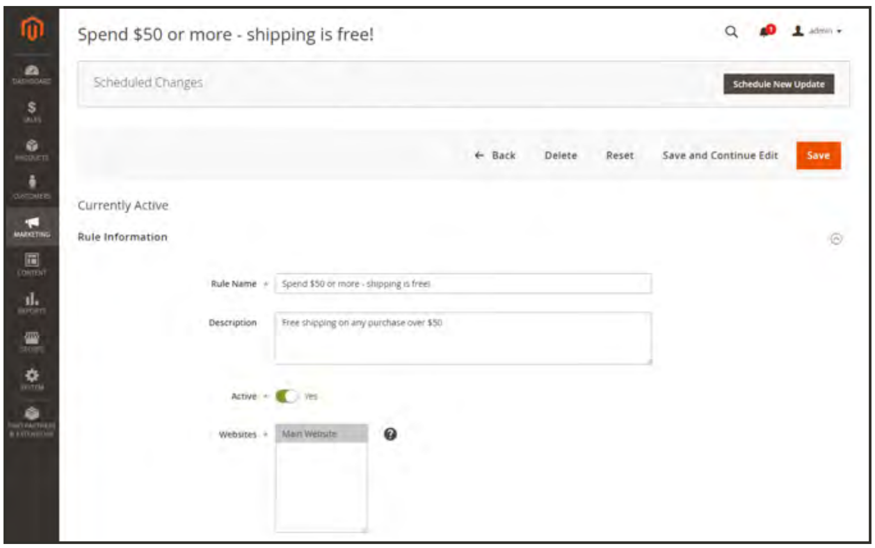
      The Order Updated report is created in real-time, and does not require a refresh.
   b. To define the period of time covered by the report, set **Period** to one of the following:
      - Day
      - Month
      - Year
   c. Enter the **From** and **To** dates in M/D/YY format to define the date range of the report.
   d. To print a report for a specific order status, set **Order Status** to "Specified," Then, choose the order status from the list.
   e. Set omit rows without data from the report, set **Empty Rows** to "No."
   f. Do one of the following:
      - To include all coupon activity from all price rules, set **Cart Price Rule** to "Any."
      - To include only activity that is related to a specific price rule, set **Cart Price Rule** to "Specified," Then, select the specific cart price rule in the list.
5. When ready to run the report, tap **Show Report**. The report appears at the bottom of the page.

Scheduled Changes for Cart Price Rules

Cart price rules can be applied on schedule as part of a campaign, and grouped with other content changes. You can create a new campaign based on scheduled changes to a price rule, or apply the changes to an existing campaign.

> If a campaign that includes a price rule is initially created without an end date, the campaign cannot later be edited to include an end date. It is recommended that you either add an end date when you create the campaign, or create a duplicate version of the existing campaign and add the end date to the duplicate as needed.

If there are multiple price rules running in the same campaign, the Priority setting of the price rule determines which rule takes precedence. To learn more, see: Content Staging.



Scheduled Changes

Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a coupon. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and "shipped" to complete the workflow.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

Process Overview:

Step 1: Enable Free Shipping

Step 2: Create a Cart Price Rule

Step 3: Complete the Labels

Step 4: Save and Test the Rule

Step 1: Enable Free Shipping

1. Enable Free Shipping in your store's configuration.
2. Complete the free shipping settings for any carrier service that you want to use for free shipping.

Step 2: Create a Cart Price Rule

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

2. Follow the steps below to set up the type of free shipping promotion that you want to offer.

Example 1: Free Shipping for Any Order

1. Complete the **Rule Information** as follows:

   a. Enter a **Rule Name** for internal reference.

   b. Enter a brief **Description** to describe the rule.

   c. Set **Active** to "Yes."

   d. In the **Websites** box, select each site where the free shipping coupon is to be available.

   e. Select the **Customer Groups** to which the rule applies.

   f. Set **Coupon** to one of the following:

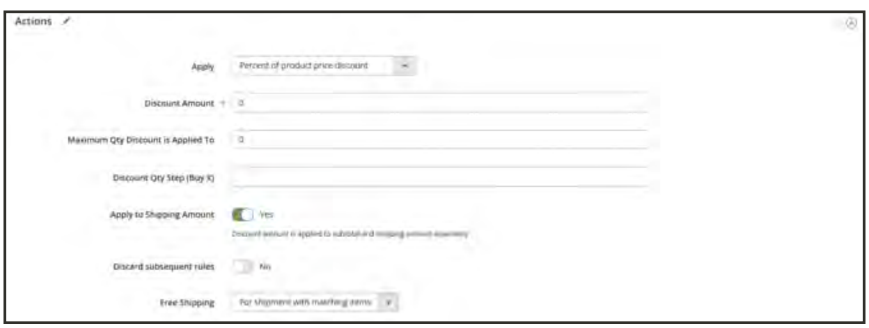
   - To offer a free shipping promotion without a coupon, accept the default, "No Coupon" setting.
   - To use a coupon with the price rule, select "Specific Coupon." If necessary, complete the instructions to set up a coupon.

2. Scroll down and expand the **Actions** section. Then, do the following:

   a. Set **Apply** to "Percent of product price discount."

   b. Set **Apply to Shipping Amount** to "Yes."

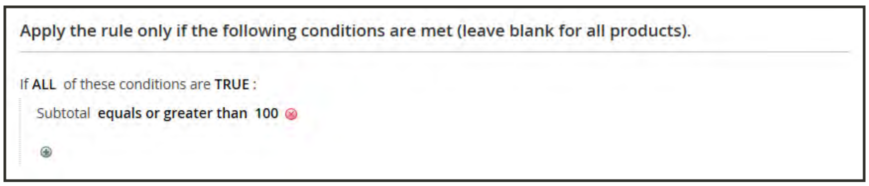
   c. Set **Free Shipping** to "For shipment with matching items."



Price Rule Action

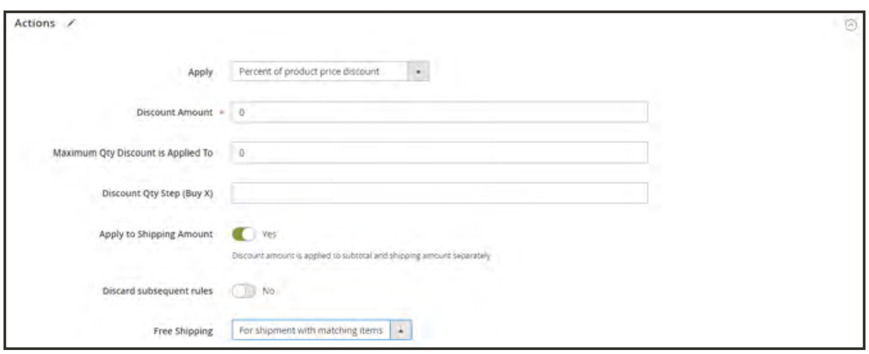
Example 2: Free Shipping for Orders Over $Amount

1. Complete the **General Information** settings as described in the previous example.
2. Scroll down and expand the **Conditions** section.
3. Tap **Add** ( ) to insert a condition. Then, do the following:
   a. In the list under **Cart Attribute**, choose **Subtotal**.
   b. Click the **is** link, and choose “equals or greater than.”
   c. Click the (...) “more” link, and enter a threshold value for the Subtotal, such as 100, to complete the condition.



Condition

4. If necessary, expand the **Actions**. section. Then do the following:
   a. Set **Apply** to “Percent of product price discount.”
   b. Set **Apply to Shipping Amount** to “Yes.”
   c. Set **Free Shipping** to “For shipment with matching items.”



Actions

Step 3: Complete the Labels

Complete Step 4 of the cart price rule instructions to enter any labels that appear during checkout.

Step 4: Save and Test the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

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

Buy X Get Y Free

This example shows how to set up a cart price rule for a “Buy X, Get Y Free” promotion. The format of the discount is as follows:

```
Buy X quantity of product, get Y quantity for free.
```

Process Overview:

Step 1: Create a Cart Price Rule

Step 2: Define the Conditions

Step 3: Define the Actions

Step 4: Complete the Label

Step 5: Save and Test the Rule

Step 1: Create a Cart Price Rule

Complete Step 1 of the cart price rule instructions to complete the rule information.

Step 2: Define the Conditions

Complete Step 2 of the cart instructions to define the conditions for the price rule. This is the first of two conditions that can be added to the rule, and determines when the rule is triggered. It can be based upon a combination of product attributes, products, cart attributes, and customer segments. If left blank, the rule is triggered for every cart.

Condition

Step 3: Define the Actions

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

   a. Set **Apply** to “Buy X get Y free (discount amount is Y).”

   b. Set **Discount Amount** to 1. This is the quantity the customer will receive for free.

   c. To limit the number of discounts that can be applied when the condition is met, enter the number in the **Maximum Qty Discount is Applied To** field. For example, enter “1” to discount only one item.

   d. In the **Discount Qty Step (Buy X)** field, enter the quantity that the customer must purchase to qualify for the discount. In this example, the customer must purchase three.

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

Buy 3 Get 1 Free

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

Condition for Cart Items

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

4. Tap **Save and Continue Edit**. Then, complete the rest of the rule as needed.

Step 4: Complete the Label

Complete Step 4 of the cart price rule instructions to enter the label that appears during checkout.

Step 5: Save and Test the Rule

1. When complete, tap **Save Rule**.

2. Test the rule to make sure that it works correctly.

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

Examples

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

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

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

```
If ALL of these conditions are TRUE:

Category is one of A, B, C
```

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

```
If ALL of these conditions are TRUE:

SKU is one of D123, E123, F123
```

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

```
Formula = (X+Y) * (M/Y)

Where

X = number of items purchased

Y = number of free items

M = Maximum number of free items allowed
```

For example:

```
Buy 5 Get 2 Free with maximum of 4 free items allowed.

Where

X = 5

Y = 2

M = 4

Maximum Qty Discount = (5+2)*(4/2)=(7)*(2)=14
```

```
Buy 5 Get 3 Free with maximum of 9 free items allowed.
```

```
Where

X = 5

Y = 3

M = 9

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

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

Where

X = 20

Y = 2

M = 20

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

Discount with Minimum Purchase

Cart price rules can be used to offer a percentage discount based on a minimum purchase. In the following example, a 25% discount is applied to all purchases over $200.00 in a specific category. The format of the discount is as follows:

```
X% off all Y (category) over $Z dollars
```

Process Overview:

Step 1: Create a Shopping Cart Rule

Step 2: Define the Conditions

Step 3: Define the Actions

Step 4: Apply the Labels

Step 5: Save and Test the Rule

Step 1: Create a Shopping Cart Rule

Follow the basic instructions to create a cart rule.

Step 2: Define the Conditions

1. Scroll down and expand the **Conditions** section.

2. Tap **Add** ( ), and choose **Product Attribute Combination**.

Product Attribute Combination

3. Tap **Add** ( ) at the beginning of the next line. Then in the list under **Product Attribute**, choose **Category**.

Category

a. Click the (...) “more” link to display additional options.

Category IS

b. Tap the **Chooser** ( ) button to see the available categories. In the category tree, mark the checkbox of each category that you want to include. Then, press **Enter** to add the categories to the condition.

Category IS

4. Tap **Add** ( ) at the beginning of the next line, and do the following:

a. In the list under **Cart Item Attribute**, choose **Price in cart**.

Category IS

a. Click the **is** link, and choose “equals or greater than.”

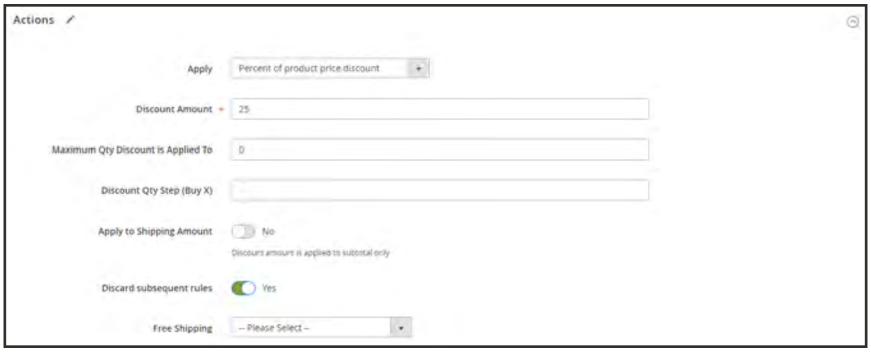
b. Click the (...) “more” link and enter the amount that the Price in Cart must be to meet the condition. For example, enter 200.

Enter the Price to Complete the Condition

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

Step 3: Define the Actions

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



Actions

   a. Set **Apply** to "Percent of product price discount."

   b. Enter the **Discount Amount**. For example, enter 25 for a twenty-five percent discount.

   c. To prevent additional promotions from being applied to the purchase, set **Discard subsequent rules** to "Yes."

2. Tap **Save and Continue Edit** . Then, complete the rule as needed.

Step 4: Complete the Labels

Complete Step 4 of the cart price rule instructions to enter any labels that appear during checkout.

Step 5: Save and Test the Rule

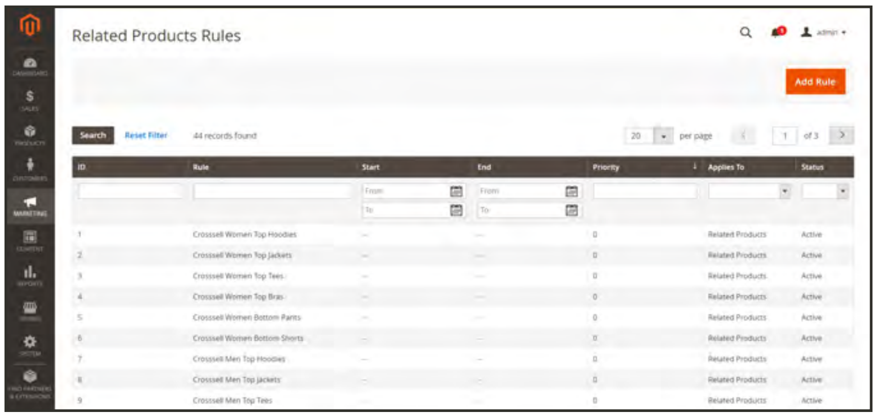
1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

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

CHAPTER 24:

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

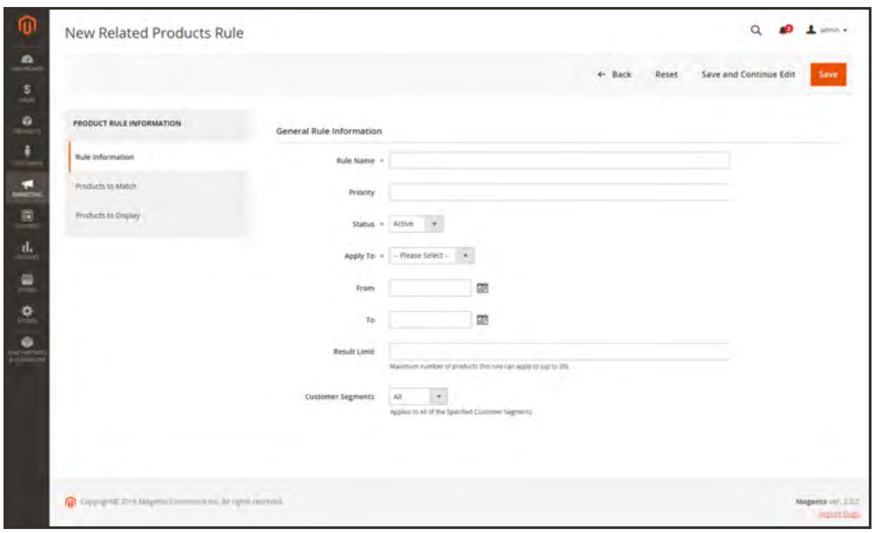
Creating a Related Product Rule

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 that you want to display. At any given time there might be a number of active rules that can be triggered to display related products, up-sells, and cross-sells. The priority of each rule determines the order in which the block of products appears on the page.

> For an attribute to be used in a targeted rule, the Use for Promo Rule Conditions property must be set to "Yes."

To create a related product rule:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Related Product Rules**.
2. In the upper-right corner, tap **Add Rule**.



Rule Information

3. Complete the **Rule Information** as follows:
   a. Enter a **Rule Name** to identify the rule when working in the Admin.
   b. In the **Priority** field, enter a number that determine the order that the results appear on the page, when results from other rules target the same location. Number 1 is top priority.
   c. To enable the rule, set **Status** to "Active."
   d. Set **Apply To** to one of the following:

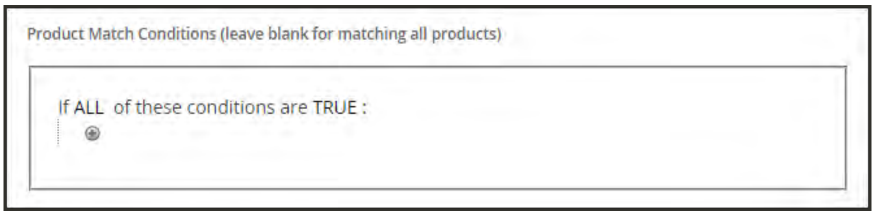
- Related Products
- Up-sells
- Cross-sells

e. If the rule is to be active for a specific range of time, enter the **From** and **To** dates.

f. In the **Result Limit** field, enter the number of records to appear in the results list. The maximum number is 20.

g. If the rule applies to a specific customer segment, set **Customer Segments** to “Specified.” Then, choose the customer segment from the list.

4. In the panel on the left, choose **Products to Match**. Then, build the condition as you would for a catalog price rule.



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.

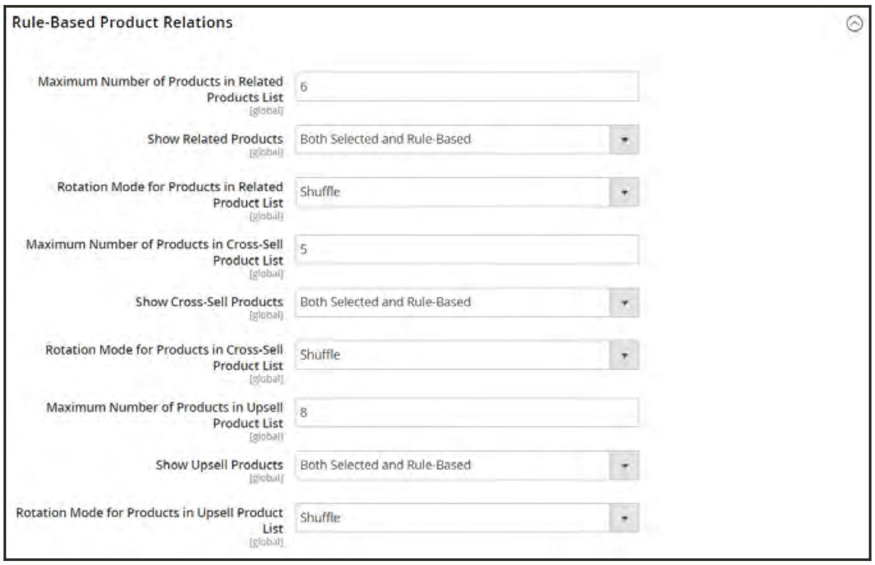
By priority, the matching products returned from Rule 1 can be used first to fill all twenty-six available slots. Because Rule 1 returned only two matching products, there is still room for twenty-four more. Rule 2 has the next highest priority, and returns six more matching products. There are now eighteen 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**.

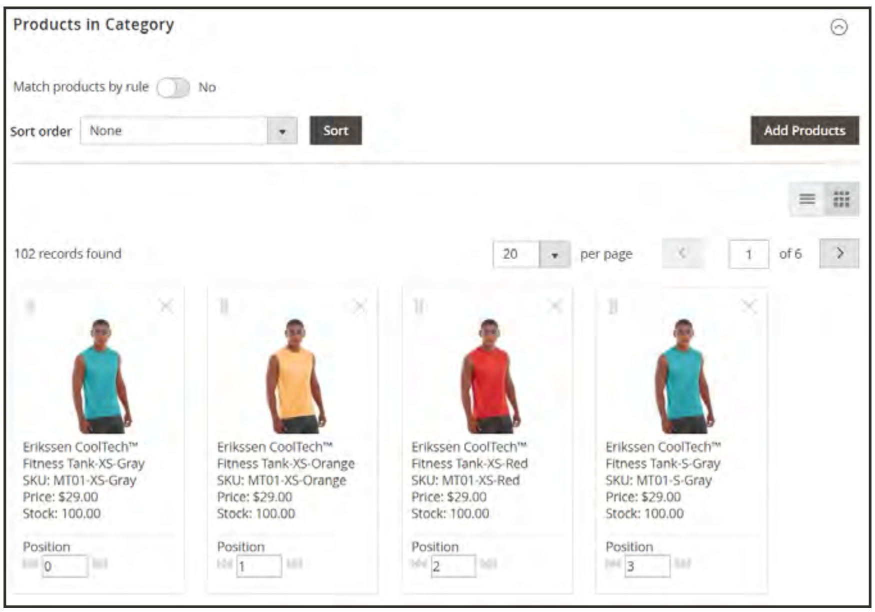
Merchandising

Contents

CHAPTER 25:

Visual Merchandiser

Visual Merchandiser is a set of advanced tools that allows you to position products, and apply conditions that determine which products appear in the category listing. The result can be a dynamic selection of products that adjusts to changes in the catalog. You have the option to work in “visual mode,” which shows each product as a tile on a grid, or to work from a list of products in the category. The same tools are available in each mode, and you can use the buttons in the upper-right corner to toggle between each type of display.



Category Products Viewed as Tiles

To access Visual Merchandiser:

1. On the Admin sidebar, tap **Catalog**. Then choose **Categories**.
2. Drill down through the category tree, and click the category that you want to edit.
3. Scroll down, and expand the **Products in Category** section.
4. Tap the **View as Tiles** ( ) button to display the products as a grid.
5. When complete, tap **Save Category**.

To change the position of a product:

1. Use the Sort Order and paginate tools to view the product that you want to move.

Method 1: Drag and Drop

Grab the **Drag** ( ) control in the upper-right corner of the product tile, and drop the product into position. The number of each product adjusts to reflect the new position.

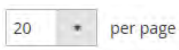
Method 2: Set Position Value

In the **Position** field (0)on the product tile, enter the number where you want the product to appear. Enter the number zero (0) to place the product at the top of the list.

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

> In a clean installation, Magento reserves the category ID 2 for the root catalog of the default store. Visual Merchandiser can use only categories with an ID number of 3 or greater.

Workspace Controls

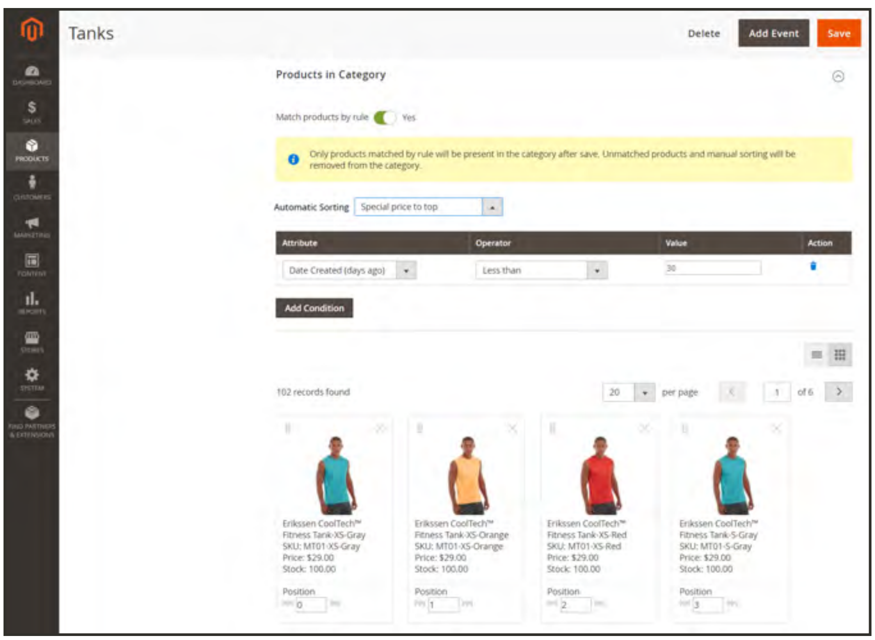
CONTROL	DESCRIPTION
	View as List
	View as Tiles
	Match by Rule
	Drag
	Position
	Remove from Category
	View Per Page
	Go To Next / Previous

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."

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



Category Product Rule

Category product rules can speed up the process of assigning specific products to categories, based on conditions that determine which products appear in the category. The "smart" attributes that can be used with category product rules are specified in the Visual Merchandiser configuration.

> Use caution when applying a category product rule, because any products that do not meet the condition are removed from the category. For example, if you create a rule that includes only purple tank tops, all other tank tops are removed from the category.

Step 1: Configure the "Smart" Attributes

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

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

Step 2: Create the Category Rule

1. In the category tree, open the category to be edited.

2. In the **Products in Category** section, set **Match products by rule** to the "Yes" position.

   The automatic sorting and condition options appear.

3. Tap **Add Condition**, and do the following:

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

   b. Choose the **Operator** that is needed to form the expression.

   c. Enter the **Value** that is to be matched.

Add Condition to Category Rule

4. Repeat this process for each attribute that is needed to describe the condition(s) to be met. For example, to match products that were created between 7 and 30 days ago, do the following:

   a. Set **Date Created** to "Less than 30."

   b. Set **Logic** to "AND."

   c. Set **Date Modified** to "Greater than 7."

5. To apply a sort order automatically to the dynamically generated product list, set **Automatic Sorting** to one of the following:

   - Move out of stock to bottom
   - Special price to top

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

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

Menu Options

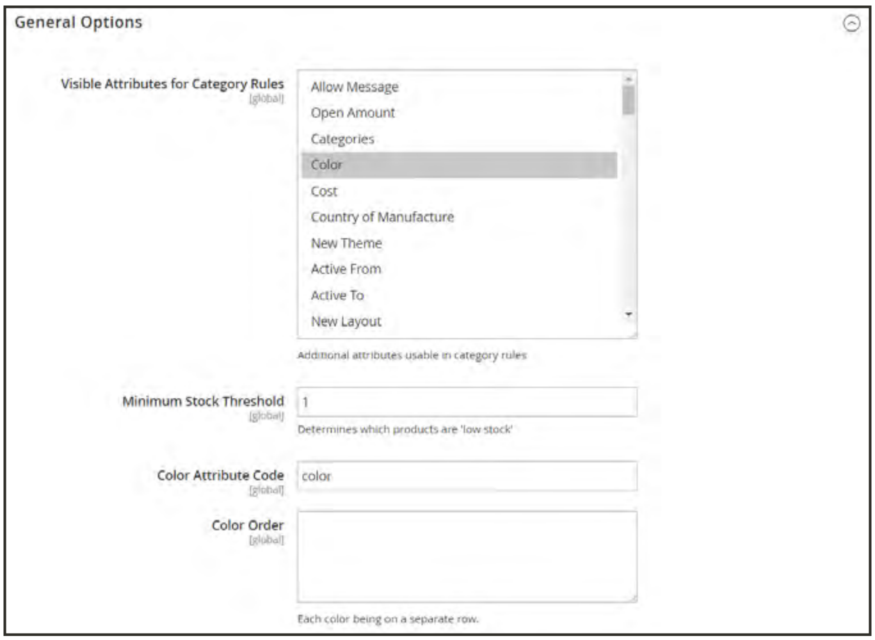
OPTION	DESCRIPTION
Match products by rule	Determines if the list of products in the category is dynamically generated by a category rule. Options: Yes / No
Automatic Sorting	Automatically applies a sorting order to the list of category products. Options: None Move low stock to top Move low stock to bottom Special price to top Special price to bottom Newest products first Sort by color Name: A - Z Name: Z - A SKU: Ascending SKU: Descending Price: High to Low Price: Low to High
Add Condition	Adds an additional condition to the rule.
CONDITIONS	
Attribute	Determines the attribute that is used as the basis of the condition. Options: 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.

Menu Options (cont.)

OPTION	DESCRIPTION	
	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. The operators follow the rules of precedence for MySQL boolean operators. Options: AND / OR	

Configuring “Smart Attributes” for Visual Merchandiser

The Visual Merchandiser configuration determines the attributes that can be used in the merchandising window, the minimum stock threshold, and identifies the attribute used for color, and the order of color values.



General Options

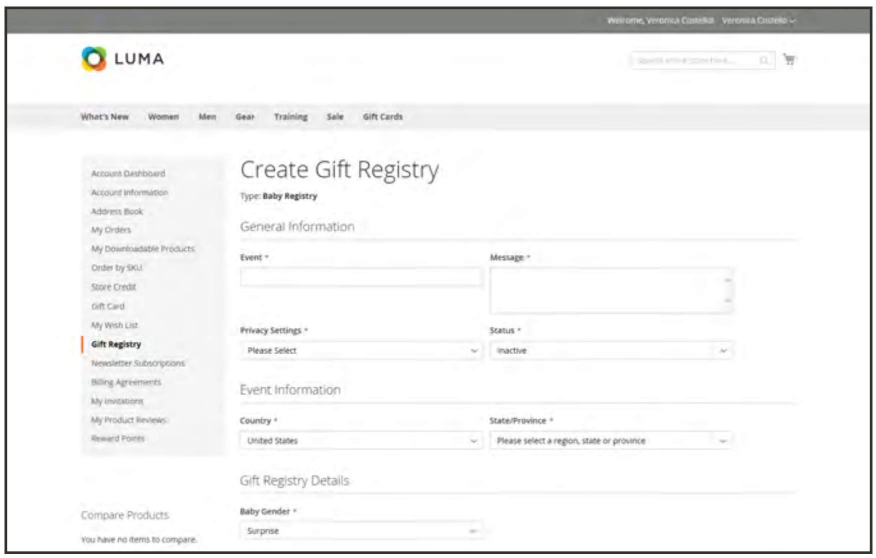
To configure Visual Merchandiser:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **Catalog**.
3. Expand the **Visual Merchandising Options** section. Then, do the following:
   a. In the **Attributes for Category Rules** list, select each attribute that you want to make available for visual merchandising. To choose multiple items, hold down the Ctrl key, and click each item.
   b. Enter the **Minimum Stock Threshold** for a product to appear in the Visual Merchandiser window.
   c. Enter the **Color Attribute Code**. The default value is `color`. If your catalog uses a different attribute, enter the attribute name in lowercase.
   d. In the **Color Order** box, enter each color value on a separate line and in sequence, to determine the priority of each color.
4. When complete, tap **Save Config**.

CHAPTER 26:

Gift Registries

Magento Commerce gives your customers the ability to create gift registries for special occasions, and to invite their friends and family to purchase their gifts from the gift registry. Magento keeps track of all items purchased and the quantities remaining.



Create Gift Registry in Customer Dashboard

The gift registry owner can add products to the registry from their customer dashboard. In addition, products can be transferred from the wish list or cart. The store administrator can view and share customer gift registries, and perform maintenance such as adding items from the customer's cart, updating quantities, or deleting a gift registry.

To access a gift registry, recipients can click the link in the email they receive, or search by the recipient's name, email, or gift registry ID. In most stores, the footer of each page has a link to the gift registry, although the location might vary by theme. In addition, the Widget tool can be used to place Gift Registry Search anywhere in your store.

Registry visitors who want to make a purchase can add the item to their carts directly from the gift registry. When the order is placed, the gift registry is updated to reflect the purchase.

Gift Registry Workflow

1. **Configure the store's gift registry.** The store administrator enables the gift registry, and sets up the registry type and attributes.

2. **Customers create their own registries.** A customer creates a new gift registry from their store account for an upcoming occasion, and completes the required fields in each section of the gift registry. After adding items to the registry, it can be shared with friends and family.

3. **Invitations are sent.** A link to the gift registry is included in each invitation.

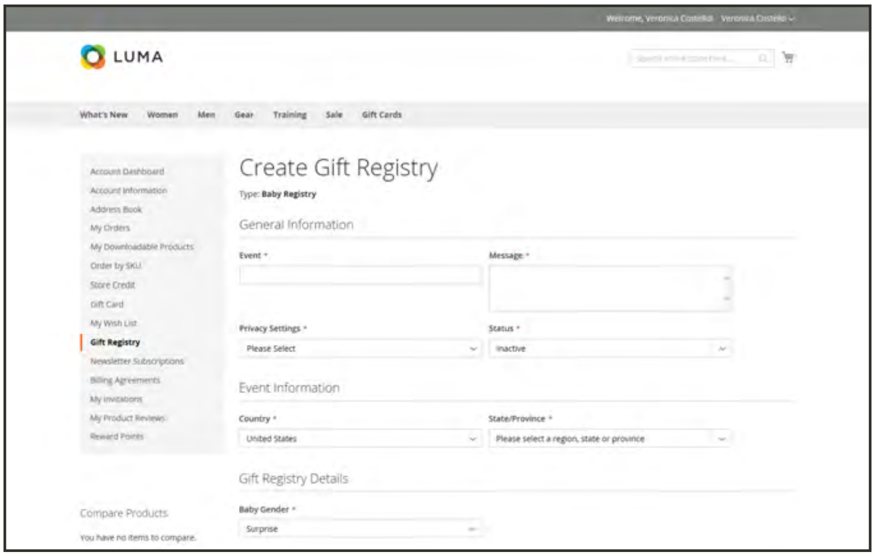
   If Gift Registry Search is available in the store, customers can search for specific gift registries by name, email address, or gift registry ID.

4. **Invitation recipients place orders.** Those who receive an invitation can place an order for any item directly from the gift registry.

   As items are sold, Magento updates the gift registry item counts, and notifies the gift registry owner.

Gift Registry 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.
Registrant Information	The Registrant Information section includes the name and contact information of each person who is to receive notification of the registry. For a wedding registry, the Role field might be included to associate the registrant as a friend of the bride or groom.
Shipping Address	The Shipping Address section shows where gifts are to be sent, and includes the information a carrier needs to deliver the package.

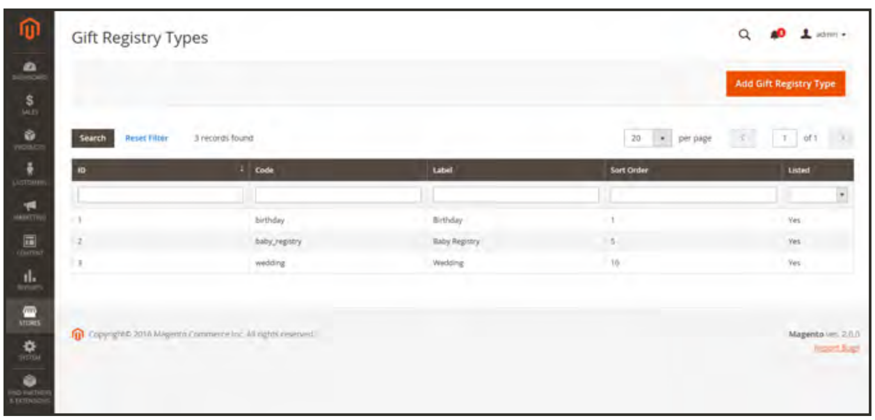
Setting Up a Gift Registry

A gift registry can be created for any type of event, such as a wedding, birthday, anniversary, new baby, or any other special occasion. By default, Magento includes the following special events:

- Baby
- Birthday
- Wedding

When you create a new registry, it becomes an option in the list of gift registry types in the customer's account.

You can use one of the three prepared gift registries, or create your own custom registry. Each gift registry type includes a number of attributes, which are the data entry fields that a customer completes to create a gift registry. The attributes provide additional information about the event, time and location, or any other information that is needed. Depending on the input type, some attributes have multiple options. For example, the gift registry type "Wedding," has the attribute "Role," with the options, "Bride," "Groom," and "Partner." To learn more about attributes and input types, see: Attributes.



Gift Registry Types

To use a prepared gift registry:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Registry**.

   The birthday, wedding, and baby registries are ready for customers to use from their accounts.

2. Make sure to complete the email template configuration, so they reflect your brand.

To create a custom gift registry:

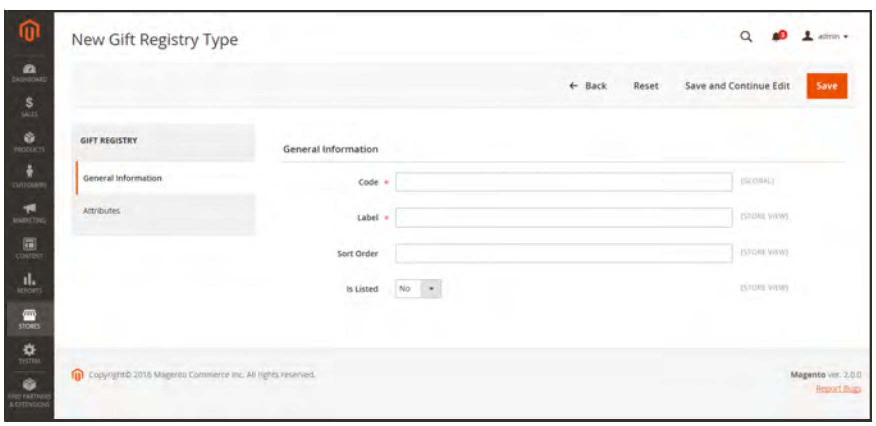
1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Gift Registry**.
2. In the upper-right corner, tap **Add Gift Registry Type**.
3. Under **General Information**, complete the following:

   a. Enter a unique **Code** to identify the gift registry internally. The code must begin with a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and underscore (_).

   b. In the **Label** field, enter a name for the gift registry, as you want it to appear in the store. This label will be an option in the list of gift registry types that are available to the customer.

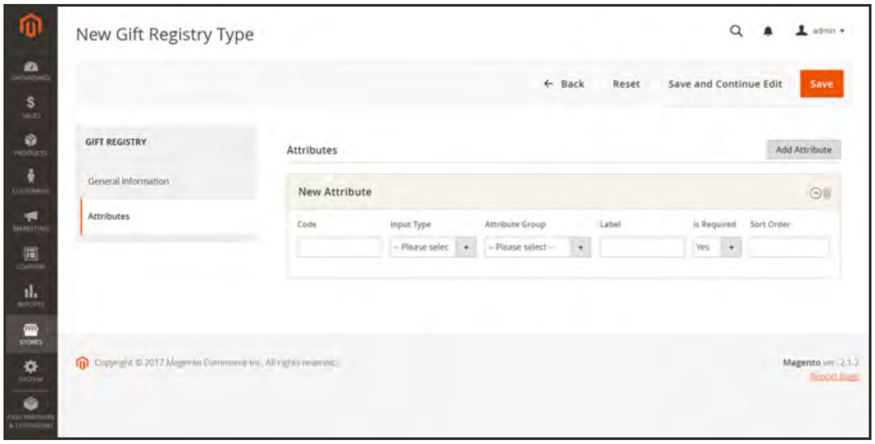
   c. In the **Sort Order** field, enter a number to determine the order that this gift registry appears when listed with other types.

   d. To activate the gift registry, set **Is Listed** to "Yes."



General Information

4. Examine each section of the Gift Registry to determine the type of information you want to include.
5. In the panel on the left, choose **Attributes**. Then, tap **Add Attribute**.



New Gift Registry Attribute

6. For each attribute, do the following:

   a. Assign a unique **Code** to identify the attribute internally. The code can be up to fifteen characters in length, and must begin with a lowercase letter. The rest of the code can include lowercase letters(a-z), numbers (0-9) and the underscore (_) character to separate words.

   b. Choose the **Input Type** to be used for data entry. You can use one of the custom or static types.

   Some input types have additional properties. For example, the Event Location has additional properties to make the event searchable, and included in your store's public list of gift registries. If the input type has multiple options, tap **Add New Option**. Then complete the following information for each option:

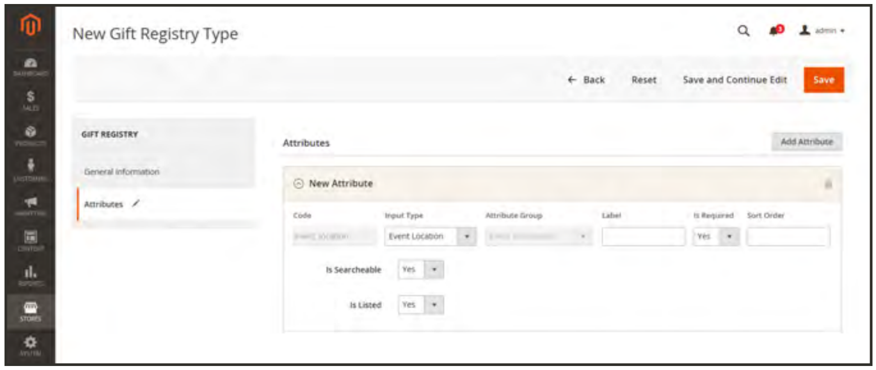
   c. Set **Attribute Group** to the section in the gift registry where you want the attribute to appear.

   d. In the **Label** field, enter a name to identify the data entry field.in the registry.

   e. If the customer is required to make a selection or enter a value in the field, set **Is Required** to "Yes."

   f. In the **Sort Order** field, enter a number to determine the sequence in which this gift registry appears when listed with other gift registries that might be available in the store.

7. To add another option, tap **Add New Option**. Each new option added appears in a new section at the top. Then, repeat this process for the new attribute.



Attribute with Multiple Options

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

Field Descriptions

ATTRIBUTE	DESCRIPTION
GENERAL INFORMATION	
Code	A unique name to identify the gift registry type internally. The first character of the code must be a lowercase letter. The rest of the code can be any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).
Label	The name of the gift registry type that appears in the store.
Sort Order	Determines the sequence in which this gift registry type appears when listed with other types.
Is Listed	Determines if the gift registry type is available to customers in the store. Options: Yes / No.
ATTRIBUTES	
Code	A unique name to identify the attribute internally.The code can include any combination of lowercase letters (a-z), numbers (0-9), and the underscore character (_).
Input Type	Determines the type of data and input control that is associated with the attribute, according to type. Options: **Custom Types** Text — Displays the attribute as a text field. Select — Displays the attribute as a drop-down list.

Field Descriptions (cont.)

ATTRIBUTE	DESCRIPTION
	Date — Displays the attribute as a date field. Country — Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No. **Static Types** Event Date — Determines how the date attribute is used in the store. Options: Searchable — Determines if the attribute is available for Advanced Search. Options include: Yes / No. Is Listed — Determines if the event is included in the list of events that is available in the store. Options include: Yes / No. Date Format — Determines the format of the event date. Options include: Short (3/23/2014) Medium (Mar 23, 1914) Long (March 23, 1914) Full (Sunday, March 23, 2014) Event Country — Displays the attribute as a drop-down list of countries. Set Show Region to: Yes / No. Event Location — The location of the event that is related to the gift registry. Role — The role that identifies who the gift is for. For example, "Bride," "Groom," or "Partner."
Attribute Group	Select the group where the attribute is listed in the gift registry. Options:

Field Descriptions (cont.)

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

Configuring Gift Registries

Before you can offer gift registries to your customers, you must enable gift registries and configure the related email notifications. Magento sends the following email notifications in response to events in the gift registry workflow.

- When a new gift registry is created, an email is sent to the owner with a link to registry that can be shared.
- Optionally, the store can send notification to friends and family of the gift registry owner, with a link to the gift registry.
- The owner is notified when items are purchased from the gift registry, but does not indicate the purchaser.

Magento has predefined templates for each of these email messages that can be customized for your brand.

Process Overview:

Step 1: Enable Gift Registries

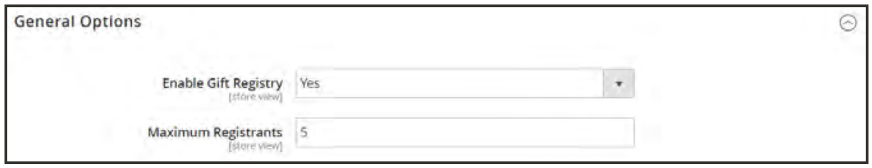
Step 2: Configure Email Notifications

Step 1: Enable Gift Registries

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

2. In the panel on the left, under **Customers**, choose **Gift Registry**

3. Expand the **General Options** section, and do the following:



General Options

   a. The Gift Registry is enabled by default. If necessary, set **Enable Gift Registry** to “Yes.”

   b. In the **Maximum Registrants** field, enter the maximum number of people that can be invited to participate in a gift registry event.

Step 2: Configure Email Notifications

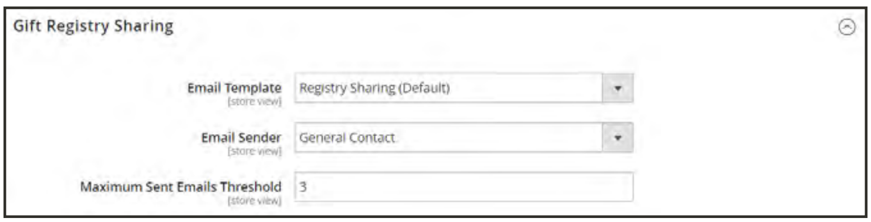
1. Expand the **Owner Notification** section, and do the following:

Owner Notification

   a. Choose the **Email Template** that notifies gift registry owners when their registries are created.

   b. Choose the store contact that appears as the **Email Sender** of the message.

2. Expand the **Gift Registry Sharing** section, and do the following:



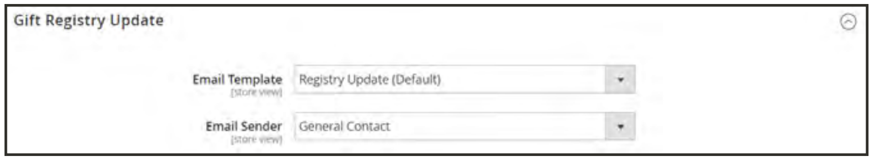
Gift Registry Sharing

   a. Choose the **Email Template** that notifies gift registry recipients when a registry is shared with them.

   b. Choose the store identify that appears as the **Email Sender** of the message.

   c. In the **Maximum Sent Emails Threshold** field, enter the maximum number of emails that can be sent at one time.

3. Expand the **Gift Registry Update** section, and do the following:



Gift Registry Update

   a. Choose the **Email Template** that notifies gift registry owners of changes to the registry.

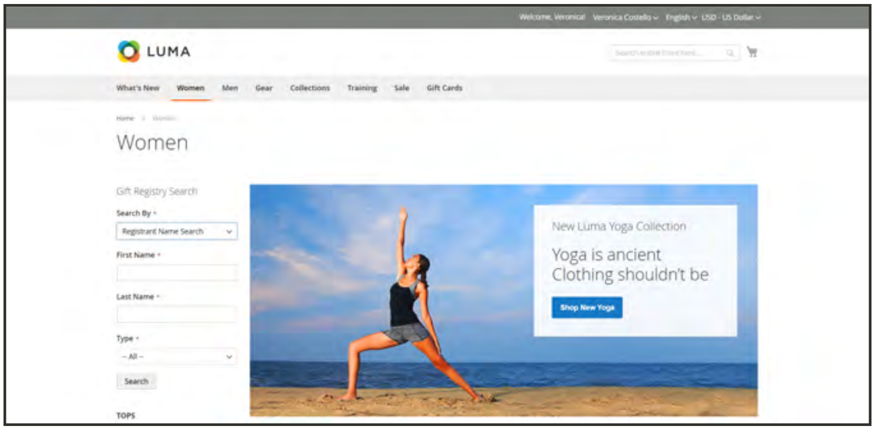
   b. Choose the store identify that appears as the **Email Sender** of the message.

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

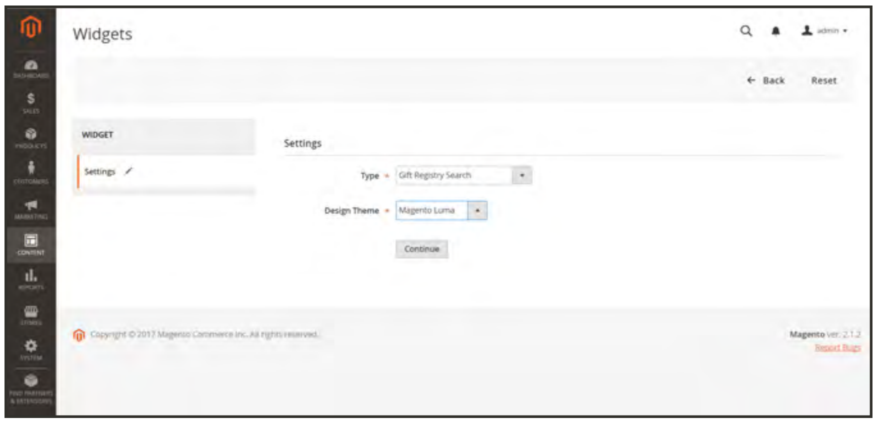
The Widget tool can be used to place a gift registry search box most anywhere in your store. You can specify the search options to be available to customers, including: name, email address, and gift registry ID. When the customer clicks the Search button, the results appear on the Gift Registry Search page. If the search returns no results, the customer can try again with other parameters.



Gift Registry Search

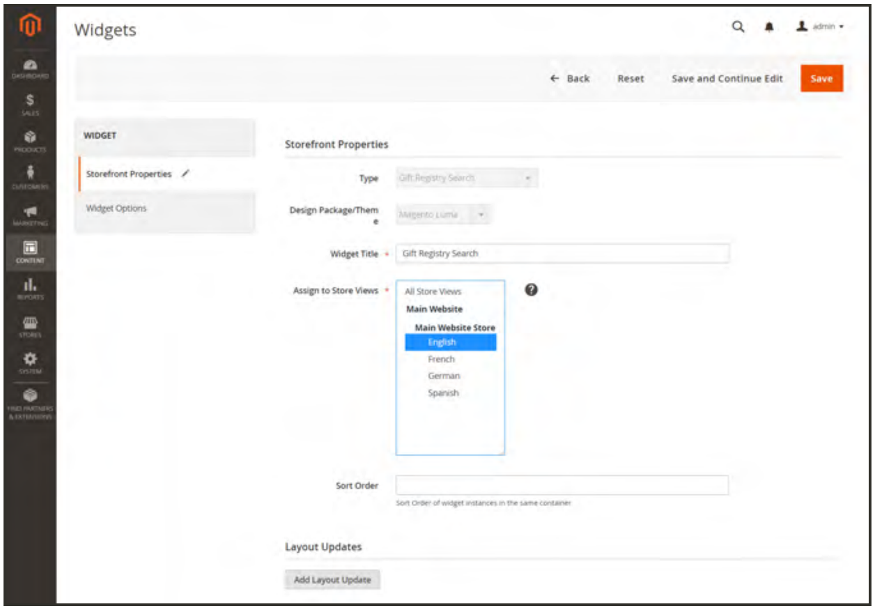
To add gift registry search:

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.



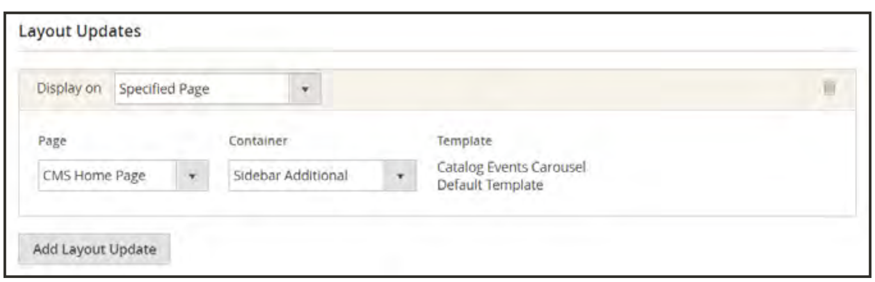
Storefront Properties

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.

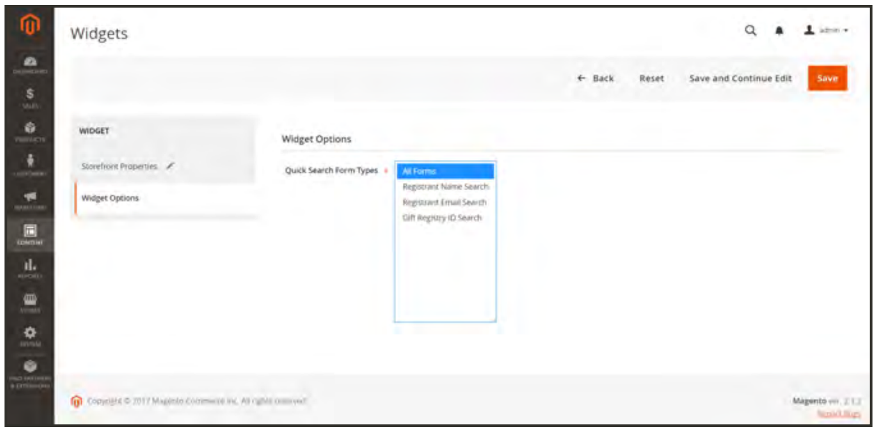
   c. Set **Container** to the location on the page where you the Gift Registry Search block to be placed.



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.

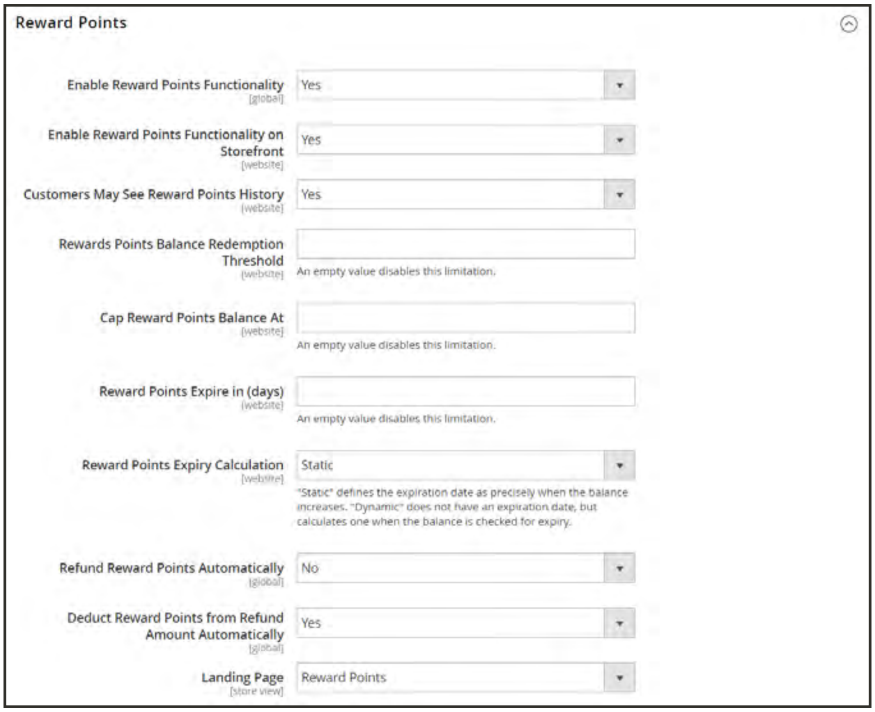
> Reward points are not recommended for use with COD purchases, because receipt of payment cannot be confirmed until after the order is invoiced.

Refunding to Reward Points

Orders placed with reward points can be refunded to the reward points balance up to the amount redeemed in the order. On the New Credit Memo page, the amount of points to be applied to the customer's balance can be entered. By default, the field contains the full amount of points that were used in the order.

Configuring Reward Points

The Reward Points configuration determines how reward points are presented in the store, and defines the basic operating parameters.



Reward Points

Process Overview:

Step 1: Configure the Reward Points

Step 2: Configure Points Earned for Customer Activities

Step 3: Complete the Email Notification Settings

Step 1: Configure the Reward Points

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Reward Points**.
3. Expand the **Reward Points** section. Then, do the following:
   a. To activate reward points, set **Enable Reward Points Functionality** to "Yes."
   b. To allow customers to earn their own reward points, set **Enable Reward Points Functionality on Storefront** to "Yes."
   c. To allow customers to see a detailed history of their rewards, set **Customers May See Reward Point History** to "Yes."
4. In the **Reward Points Balance Redemption Threshold** field, enter the number of points that must accrue before they can be redeemed. Leave blank for no minimum. Then, do the following:
   a. Enter the maximum number of points a customer can accrue in the **Cap Reward Points Balance At** field. Leave blank for no limit.
   b. Enter the number of days before the reward points expire in the **Reward Points Expire in (days)** field. Leave blank for no expiration.
   c. Set **Reward Points Expiry Calculation** to one of the following:

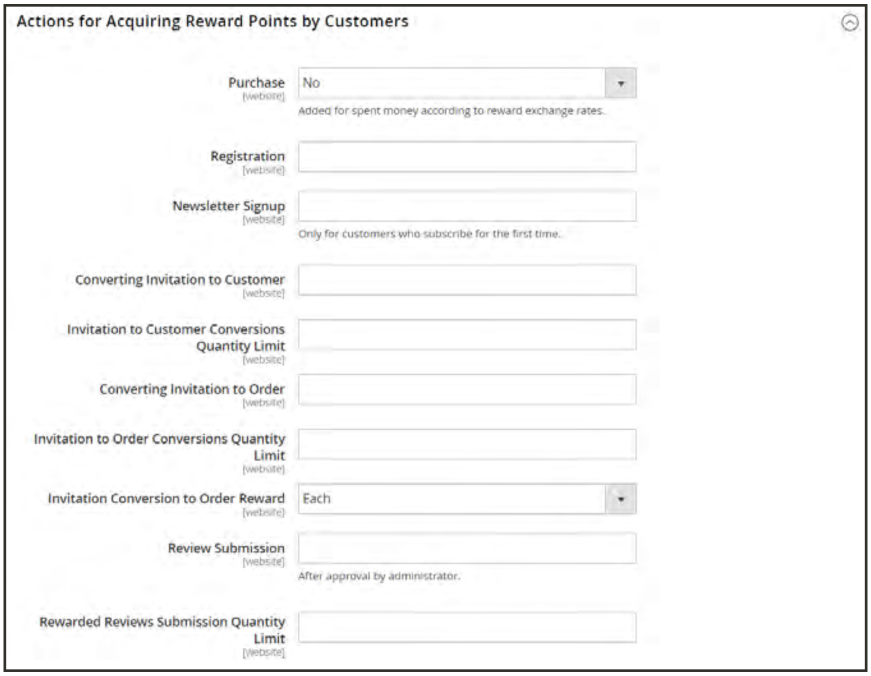
Static	Determines the remaining lifetime of reward points based on the number of days set in the configuration. If the expiration limit in the configuration changes, the expiration date of existing points does not change.
Dynamic	Calculates the number of days left whenever the reward point balance increases. If the expiration limit in the configuration changes, the expiration of all existing points update accordingly.

   d. If you want to refund available reward points automatically, set **Refund Reward Points Automatically** to "Yes."
   e. If you want to automatically deduct reward points from the amount of a refund, set **Deduct Reward Points from Refund Amount Automatically** to "Yes."
5. Set **Landing Page** to the content page that explains your reward points program. Make sure to update the default Rewards Points page with your own information.
6. When complete, tap **Save Config**.

Step 2: Configure Points Earned for Customer Activities

In this step, the number of reward points that can be earned for various customer activities is specified. When customers complete an action that has points assigned, a message appears to the customer that indicates how many points they have earned.

1. Expand the **Actions for Acquiring Reward Points by Customer** section. Then, do the following:



Actions for Acquiring Reward Points by Customer

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

   b. In the **Registration** field, enter the number of points earned for opening a customer account.

   c. In the **Newsletter Signup** field, enter the number of points earned by registered customers who subscribe to a newsletter.

2. In the **Converting Invitation to Customer** field, enter the number of points earned by a customer who sends an invitation, if the recipient then opens a customer account. Then, do the following:

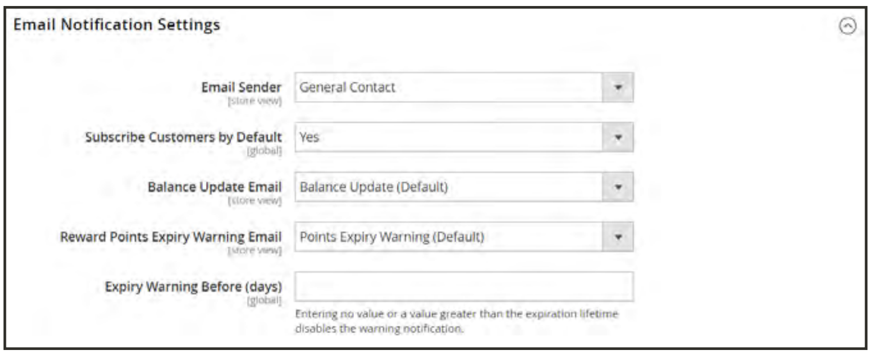
a. Enter a number in the **Invitation to Customer Conversions Quantity Limit** field to limit the number of invitation conversions that can be used to earn points for the customer who sends the invitation. Leave blank for no limit.

b. In the **Invitation Conversion to Order Reward** field, enter the number of points earned by a customer who sends an invitation, and the recipient places an initial order.

3. In the **Review Submission** field, enter the number of points earned by a customer who submits a review that is approved for publication. Then to limit the number of reviews that can be used to earn points per customer, enter the number in the **Rewarded Reviews Submission Quantity Limit** field. Leave blank for no limit.

Step 3: Complete the Email Notification Settings

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



Email Notification Settings

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

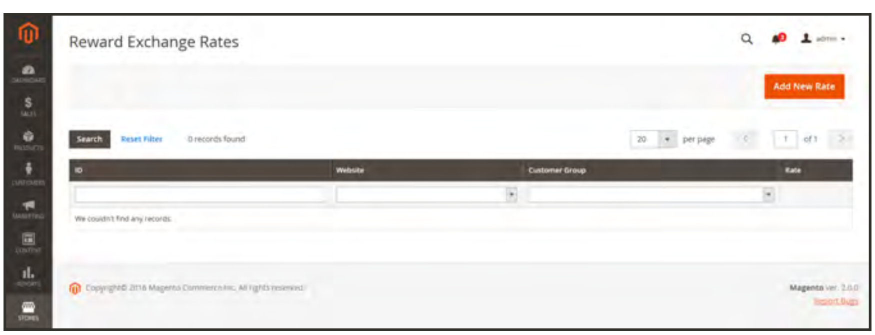
1	Applies to specific website and specific customer group.
2	Applies to all websites and a specific customer group.
3	Applies to a specific website and all customer groups.
4	Applies to all websites and all customer groups.

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

<table>
<tr><th>FIELD</th><th colspan="2">DESCRIPTION</th></tr>
<tr><td>Website</td><td colspan="2">The website(s) where the reward rates apply.</td></tr>
<tr><td>Customer Group</td><td colspan="2">The customer group(s) to which the reward rates apply.</td></tr>
<tr><td>Direction</td><td colspan="2">Determines which type of transaction the exchange rate define. Options include:</td></tr>
<tr><td></td><td>Points to Currency</td><td>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.</td></tr>
<tr><td></td><td>Currency to Points</td><td>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.</td></tr>
</table>

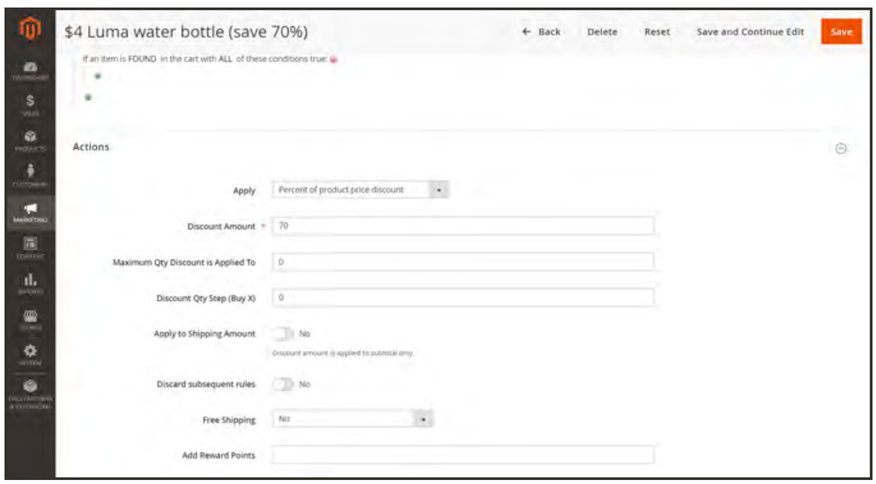
Using Reward Points in Price Rules

Reward points can be awarded to customers on the basis of a cart price rule. The award of points can be the only action of the price rule, or can be used in combination with a discount.

To add reward points to a price rule:

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**. Then, do one of the following:
   - Open an existing cart price rule.
   - Create a new cart price rule.

2. Scroll down and expand the **Actions** section. Then, enter the amount of points in the **Add Reward Points** field.



Adding Reward Points to Price Rule

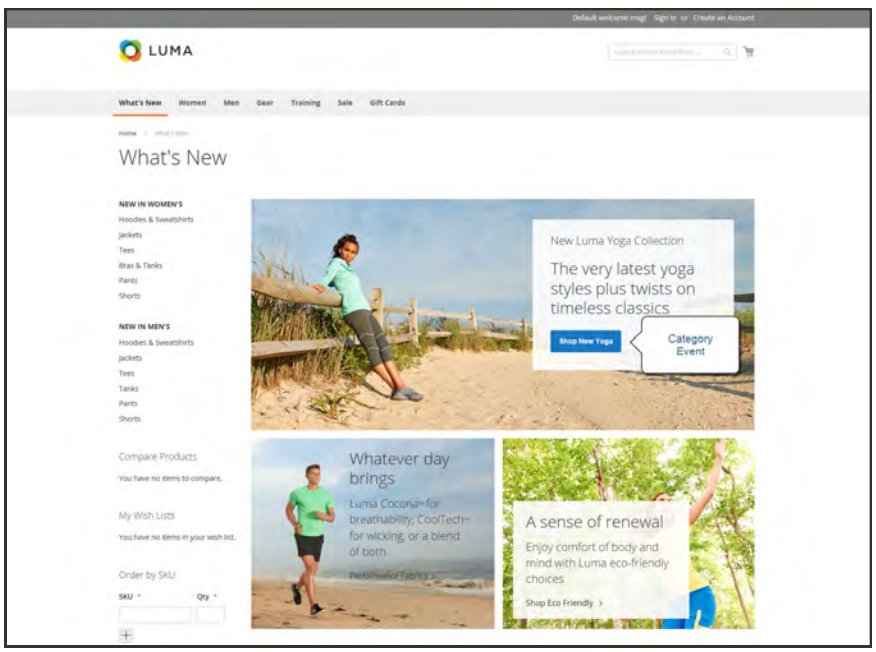
3. Follow the standard instructions to complete the cart price rule.

   When the price rule is activated, a message appears in the cart to let customers know how many points they can earn by placing the order.

CHAPTER 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.



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.

Catalog Event Carousel

When the Catalog Event widget is enabled in the configuration, it can be placed on store pages as a listing of open and upcoming events, sorted by end date. If two or more events share the same end date, the events are sorted based on the order specified in the configuration.

Customer Groups

Category permissions are based primarily on customer groups.

Category Permissions

Category permissions gives you full control over the specific activities that can take place in a given category.

Website Restrictions

Prevents public access to the site by redirecting to a landing page, login page, or registration page.

Invitations

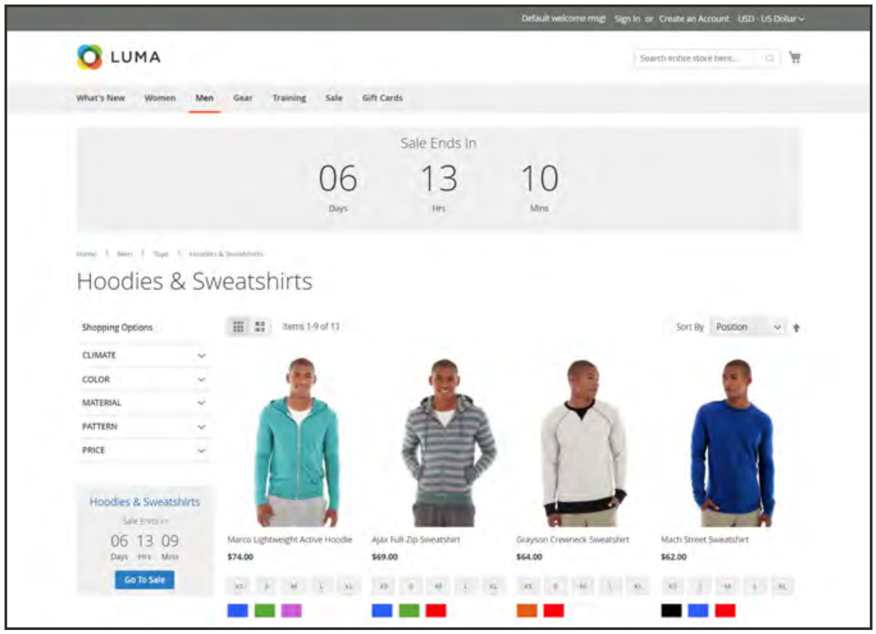
Email messages are sent with a link to create an account in the store. You can restrict the ability to create an account to only those who receive an invitation.

Private Sales Reports

The Private Sales Reports provide information about invitations sent, customers invited, and conversions.

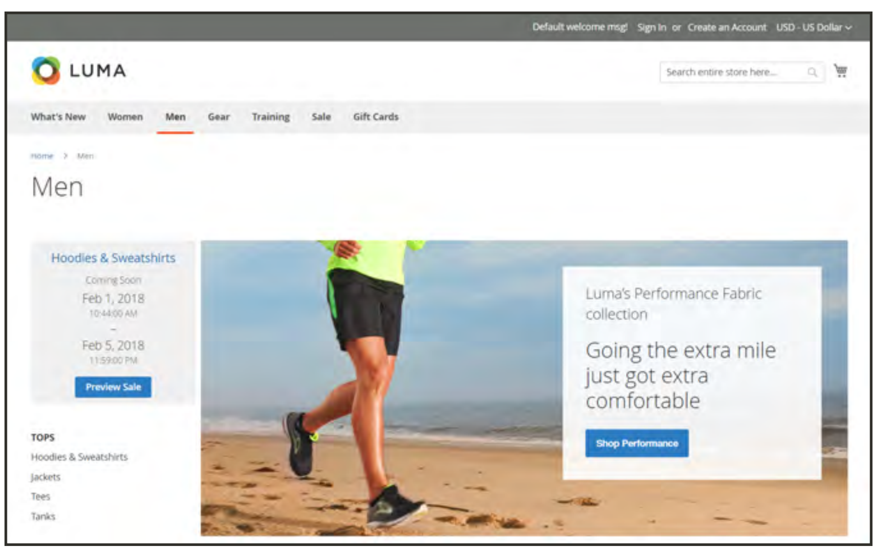
Event Ticker

The ticker block displays a countdown ticker for open events, with the start and end date for upcoming events. If an event has closed, the ticker shows the starting and ending dates.



Catalog Event Carousel

If the Category Page ticker is enabled for an event, the ticker block appears at the top of the category listing. If the Product Page ticker is enabled, the ticker block also appears at the top of the product page of any product that is associated with the category. .



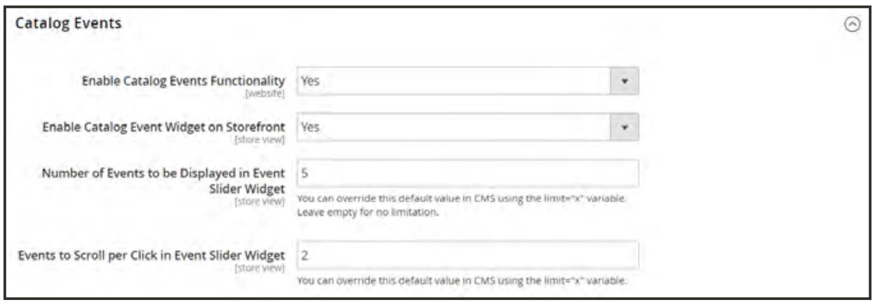
Catalog Event Carousel

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."

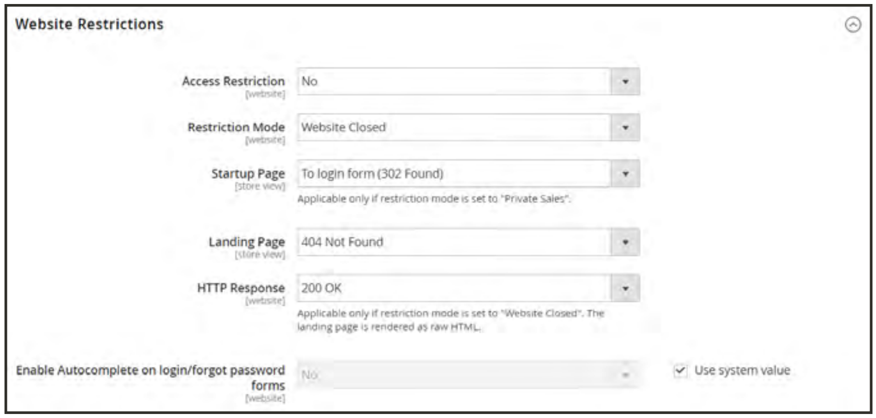
   c. Enter the **Number of Events to be Displayed in the Event Slider Sidebar Widget**. By default, this value is set to 5. If you want to display only one event in the slider at a time, enter "1."

   d. Enter the number of **Events to Scroll per Click in Event Slider Sidebar Widget**. By default, this value is set to 2. If you want the slider to display the next event in sequence when clicked, enter "1."

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

Restricting Access

Access to a private sale, event, or site can be limited to registered customers who log in, or extended to non-registered customers who must register before gaining access.



Website Restrictions

To set up exclusive access:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **General**.
3. Expand the **Website Restrictions** section, and do the following:.
   a. Set **Access Restriction** to “Yes.”
   b. Set **Restriction Mode** to one of the following:
      - Private Sales: Login Only
      - Private Sales: Login and Register
   c. Set **Startup Page** to one of the following:

To login form (302 Found)	Users are redirected to the login form before gaining access to the site.
To landing page (302 Found)	Users are redirected to the specified landing page until they log in. **Important!** Be sure to include a link to the login page from the landing page so customers can log in to access the site.

   d. Choose the **Landing Page** that appears before customers log in to the private sale site.
   e. To let search engine bots and spiders know that the landing page is correct, and that there are no other pages on the site to index. set **HTTP Response** to “200 OK”

f. If you want the fields in the customer login and forgot password forms to be filled automatically from previous entries, set **Enable Autocomplete on login/forgot password forms** to “Yes”.

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

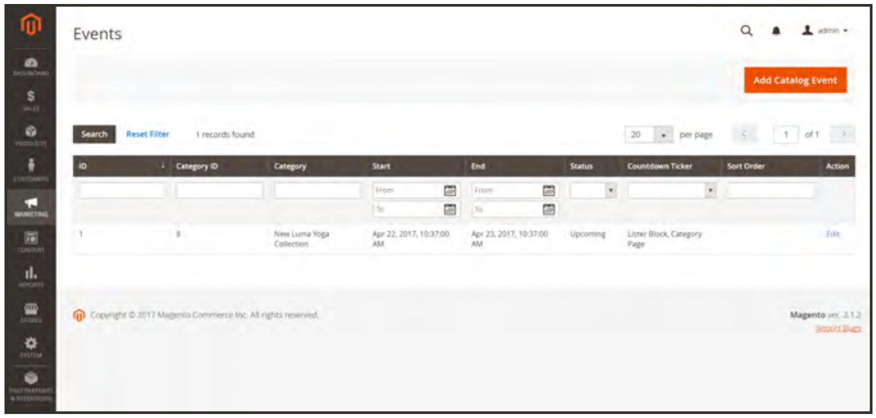
Sales Restrictions

By default, products that appear in upcoming or closed events are not available for general sale, and the Add to Cart button does not appear on the product list or product page.

To restore the Add to Cart button for a closed event, the event must be deleted. However, if a product is associated with another category that has no selling restrictions, the Add to Cart button does appear on the product page. Similarly, the ticker block does not appear on the product page if the product is associated with another category that has no selling restrictions.

Creating Events

Each event is associated with a category from your catalog, and only one event can be associated with any given category at a time. To display a list of upcoming events in your store, you must also set up a Catalog Events Carousel widget.



Manage Catalog Events

To create an event:

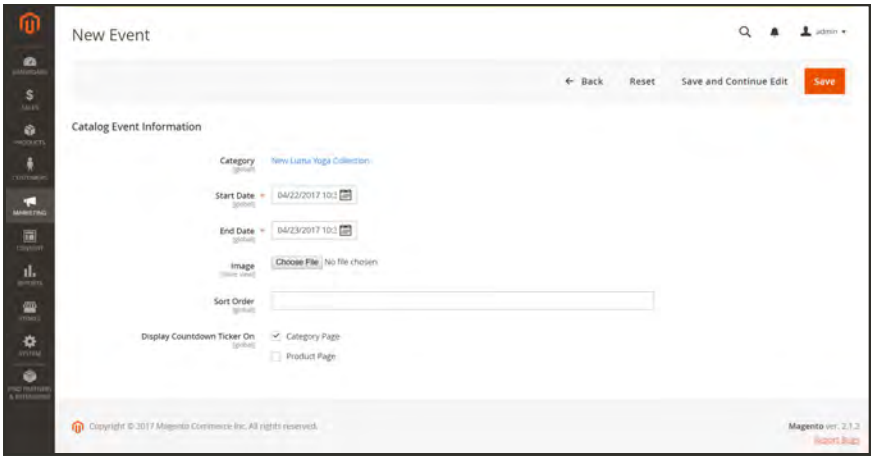
1. On the Admin sidebar, tap **Marketing**. Then under **Private Sales**, choose **Events**.
2. In the upper-right corner, tap **Add Catalog Event**. Then, do the following:

    a. In the category tree, choose the category that you want to associate with the event.

    Because each category can have only one event at a time, any categories that already have an event are disabled .

Select Category

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



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

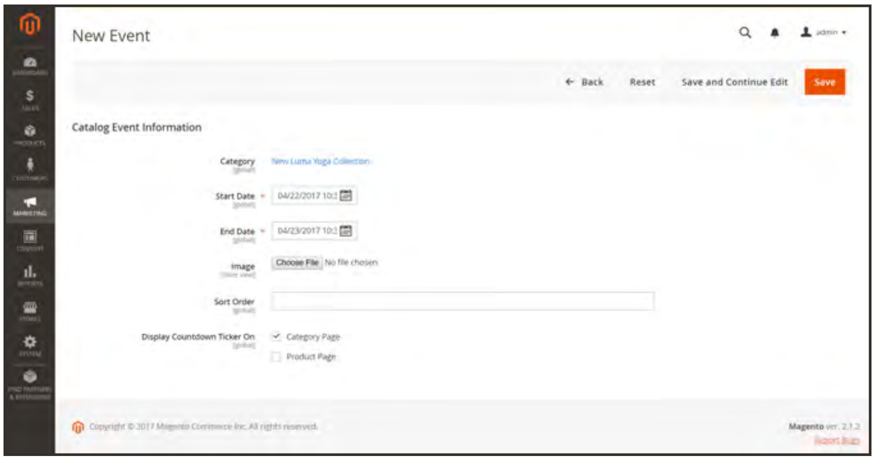
3. When complete, tap **Save**.

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 that appears in the Catalog Events Carousel 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.



Edit Event

Method 1: Edit Event from the Events Page

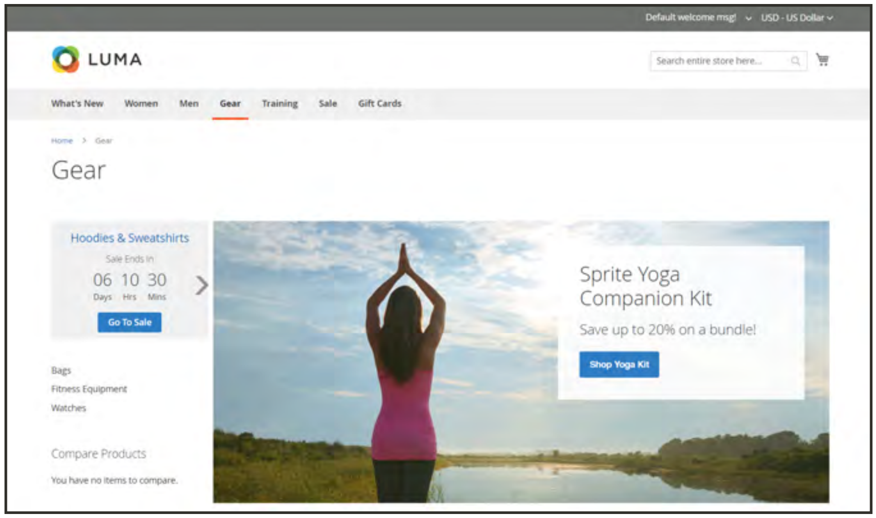
1. On the Admin sidebar, tap **Marketing**. Then under **Private Sales**, choose **Events**.
2. Find the event in the list, and open it in edit mode.
3. Make the necessary changes to the event.
4. When complete, tap **Save**.

Method 2: Edit Event from Category

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree on the left, select the category that is associated with the event. Then in the upper-right corner, tap **Edit Event**.
3. Make the necessary changes to the event.
4. When complete, tap **Save**.

Catalog Events Carousel

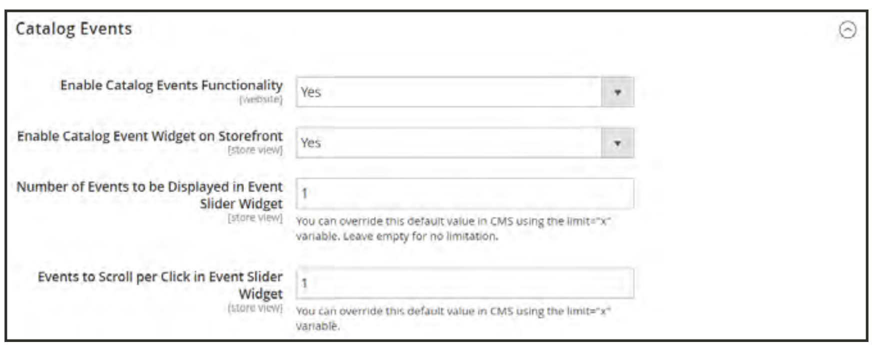
The Catalog Events Carousel widget displays a slider of upcoming events with a countdown ticker for each event. You can choose the page(s) and area of the page layout where the carousel is to appear, and control the width and number of events that appear at a time. The result you get depends on your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



Event Carousel in Left Sidebar

Step 1: Enable the Catalog Carousel Widget

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



Catalog Events

Step 2: Create the Widget

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.

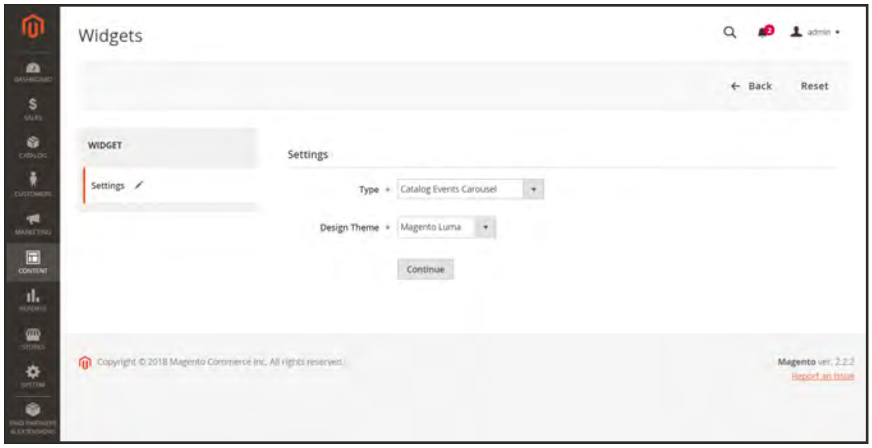
2. In the upper-right corner, tap **Add Widget**.

3. In the Settings section, do the following:

   a. Set **Type** to "Catalog Events Carousel."

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

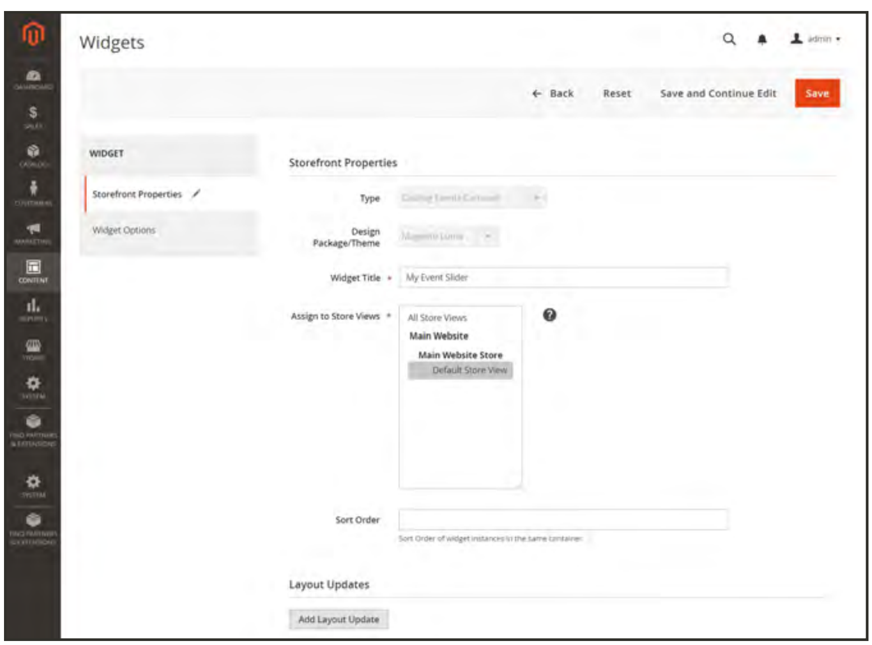
4. Tap **Continue**.



Widget Type

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.)



Storefront Properties

Step 3: Choose the Location

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:

   a. Set **Display On** to "Specified Page."

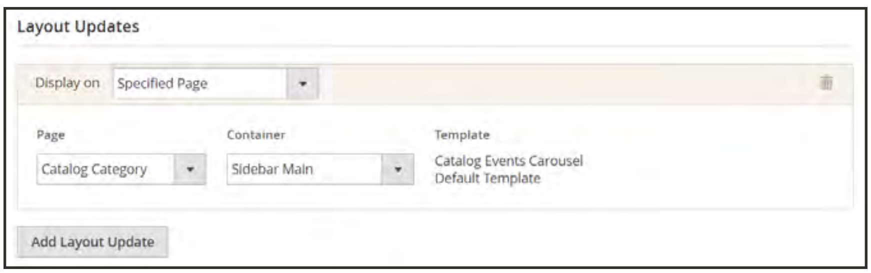
   b. Set **Page** to "CMS Home Page."

   c. Set **Container** one fo the following:

   - Main Content Area
   - Sidebar Additional
   - Sidebar Main

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

   d. If you want the Events Carousel to appear in an additional location in the storefront, tap **Add Layout Update**. Then, repeat these steps.



Layout Updates

2. Tap **Save and Continue Edit**.

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

Step 4: Configure the Options

1. In the panel on the left, choose **Widget Options**. Then, do the following:

   a. In the **Frame Size** field, enter the number of events that you want to list in the slider at the same time. To view only one event at a time, enter "1."

   b. In the **Scroll** field, enter the number of event listings that you want to scroll per click. To scroll to the next event, enter "1."

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

Widget Options

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

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

Invitations

When invitations are enabled, customers can send and view invitations from the dashboard of their customer accounts. The invitation email includes a link to your store's Customer Login page.

Invitation Workflow

1. **Customer prepares invitations**. From the account dashboard, the customer prepares the list of recipients, and completes the invitation. A custom message can be included, depending on the configuration.

2. **Customer sends invitations.** When ready, the customer taps the Send Invitations button.

3. **System manages transmission.**The system sends invitations in batches, according to the number set in the configuration.

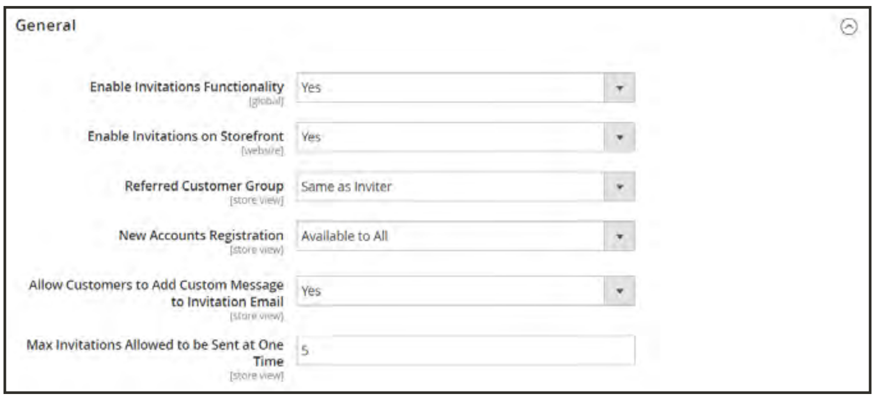
4. **Customer monitors response.** The customer monitors the status of each invitation from the account dashboard, as having been Sent, Accepted, or Canceled.

Configuring Invitations

The invitation configuration enables invitations for the store, and determines how they are sent.

To configure invitations:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Invitations**.
3. Expand the **General** section. Then, do the following:



General

a. Set **Enable Invitations Functionality** to “Yes.”

b. To allow customers to manage invitations from the storefront, set **Enable Invitations on Storefront** to “Yes.”

c. Set **Referred Customer Group** to one of the following:

- Same as Inviter
- Default Customer Group from Configuration

d. Set **New Accounts Registration** to one of the following:

- By Invitation Only
- Available to All

e. To **Allow Customers to Add Custom Message to Invitation Email**, select “Yes.”

f. To limit the number of invitations that can be sent at one time, enter the number in the **Max Invitations Allowed to be Sent at One Time** field.

4. Expand the **Email** section, and do the following:

Email

a. Select the store identity to be used as the **Customer Invitation Email Sender**.

b. Select the **Customer Invitation Email Template** used for invitations sent.

5. When complete, tap **Save Config**.

Communications

Contents

In this section of the guide, you will learn how to customize email and newsletter templates, as well as PDF invoices and packing slips. You will also learn how to personalize the content with variables and markup tags.

CHAPTER 29:

Email

Email templates define the layout, content, and formatting of automated messages sent from your store. They are called transactional emails[1] because each one is associated with a specific type of transaction, or event.

Magento includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your store. Each template is optimized for any screen size, and can be viewed from the desktop, as well as on tablets and mobile devices. You will find a variety of prepared email templates related to customer activities, sales, product alerts, admin actions, and system messages that you can customize to reflect your brand.

[1] An automated email message that is sent in response to a specific event or transaction.

Supported Email Clients

A wide range of technologies is supported by the various email clients and services available today. Although there is some variation in the way email messages are rendered, we have found the following services to be compatible with Magento Commerce.

Desktop Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
OS X 10.8	Apple Mail 6
OS X 10.7	Outlook 2011 Outlook 2013
Windows 8	Outlook 2010
Windows 7	Outlook 2007 Outlook 2003

Mobile Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
Android 4.2, “Jelly Bean”	Native email app
Android 2.3, “Gingerbread”	Native email app
Gmail App (Android 4.2)	Native email app
Blackberry 5 OS	Native email app
IOS 8	iPhone 6 iPhone 6 Plus
IOS 7	iPad (Retina) iPad Mini iPhone 5s
	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 Three Times Display Size

To take advantage of the limited vertical space in the header, make sure to crop the image to eliminate any wasted space at the top or bottom. When editing the image, be careful to preserve the aspect ratio[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 transactional email messages that are sent from your store.

Transactional Emails

Process Overview:

Step 1: Upload Your Logo

Step 2: Select the Header and Footer Templates

Step 1: Upload Your Logo

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand the **Transactional Emails** section. Then, do the following:
    a. To upload your prepared **Logo Image**, tap **Upload**. Find the file on your computer, and select the file.
    b. In the **Logo Image Alt** field, enter alternate text to identify the image.
    c. Enter the **Logo Width** and **Logo Height** in pixels. Enter each value as a number, without the “px” abbreviation. These values refer to the display dimensions of the logo in the header, and not to the actual size of the image.

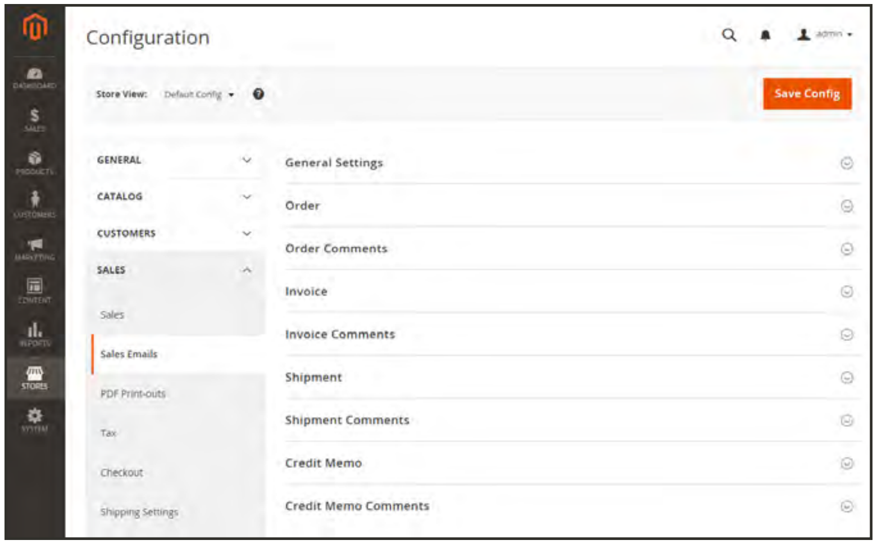
Step 2: Choose the Header and Footer Templates

If you have custom header and footer templates for your store, or for different stores, you can specify which templates are used for each, according to the scope of the configuration.

1. Choose the **Header Template** to be used for all transactional email messages.
2. Choose the **Footer Template** to be used for all transactional email messages.
3. When complete, tap **Save Config**.

Sales Email

A number of email messages are triggered by the events related to an order, and the configuration is similar. You must identify the store contact that appears as the sender of the message, the email template to be used, and anyone else who is to receive a copy of the message. Sales emails can be sent when triggered by an event, or by predetermined interval.



Sales Emails

Step 1: Update the Email Templates

Make sure that you have updated each email template to reflect your brand. For a complete list of templates, see: Email Template List.

Step 2: Choose the Type of Transmission

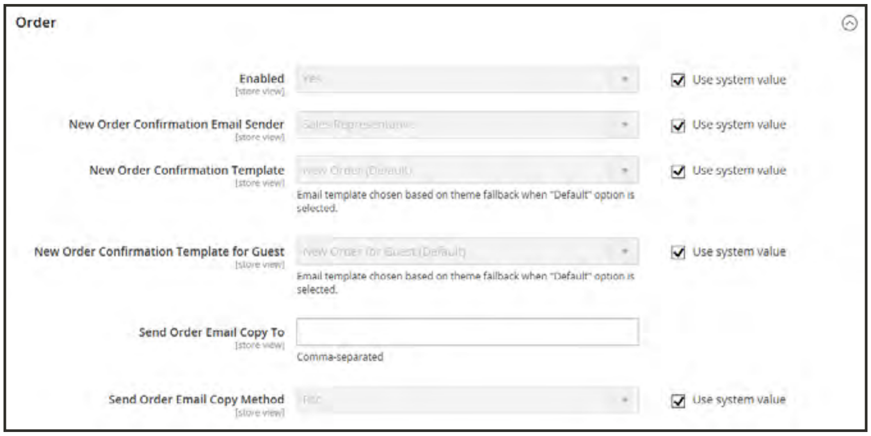
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales Emails**.
3. Expand the **General Settings** section. Then, set **Asynchronous Sending** to one of the following:

Disable	Sends sales email when triggered by an event.
Enable	Sends sales email at predetermined, regular intervals.

General Settings

Step 3: Complete the Details for Each Sales Email Message

4. 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.

5. Expand the **Order Comments** section, and repeat these steps.

Order Comments

6. Complete the configuration for the remaining sales emails:
   - Invoice
   - Shipment
   - Credit Memo
7. When complete, tap **Save Config**.

Payment Failed Email

A notification is sent to the customer if the payment method that is chosen during checkout fails to complete the transaction.

Payment Failed Emails

Step 1: Update the Email Templates

Make sure that you have updated each email template to reflect your brand. For a complete list of templates, see: Email Template List.

Step 2: Configure the Payment Failed Emails

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Payment Failed Emails** section. Then, do the following:
   a. Set **Payment Failed Email Sender** to the store contact that appears as the sender of the message.
   b. Set **Payment Failed Email Receiver** to the store contact that is to receive notification of failed email transmissions.
   c. Set **Payment Failed Template** to the template that is used for the email that is sent when the payment method fails during checkout.
   d. In the **Send Payment Failed Email Copy To** field, enter the email address of anyone who is to receive a copy of the payment failed notification. If sending a copy to multiple recipients, separate each address with a comma.

e. Send **Payment Failed Copy Method** to one of the following:

Bcc	Sends a "blind courtesy copy" by including the recipient in the header of the same email that is sent to the customer. The BCC recipient is not visible to the customer.
Separate Email	Sends the copy as a separate email.

4. When complete, tap **Save Config**.

Admin User Email

The Admin email template configuration determines the email templates that are sent when users forget and reset their passwords, the store contact that appears as the sender of the message, and how long the password recovery link remains valid.

Admin User Emails

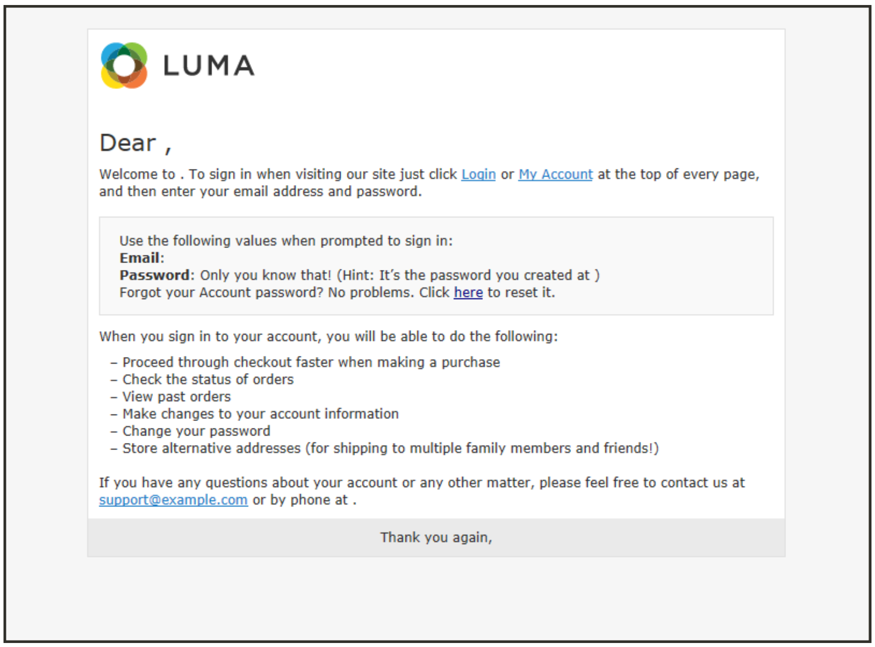
To configure the Admin email templates:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand the **Admin User Emails** section. Then, do the following:
   a. Set **Forgot Password Email Template** to the template that is sent when Admin users forget their passwords.
   b. Set **Forgot and Reset Email Sender** to the store contact that appears as the sender of the message.
   c. Set **User Notification Template** to the email template that is used as the default for admin notifications.
4. When complete, tap **Save Config**.

Customizing Email Templates

Magento includes a default email template for the body section of each message that is sent by the system. The template for the body content is combined with the header and footer templates to create the complete message. The content is formatted with HTML and CSS, and can be easily edited, and customized by adding variables and frontend apps. Email templates can be customized for each website, store, or store view. Make sure to update the system configuration after creating a customized template, so the custom template is used instead of the default.

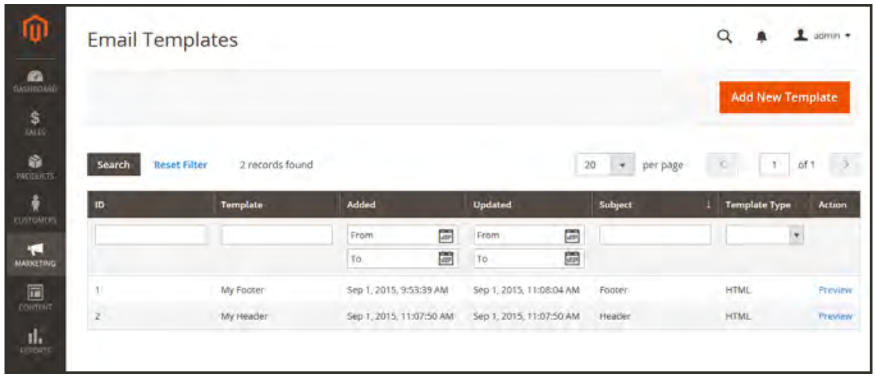
The default templates include your logo and store information, and can be used without further customization. However as a best practice, you should view each template, and make any necessary changes before they are sent to customers.



Preview of Welcome Template

Header Template

The email header template includes your logo that is linked to your store. In addition, you can easily insert variables to add store contact information to the header.



Email Templates

Process Overview:

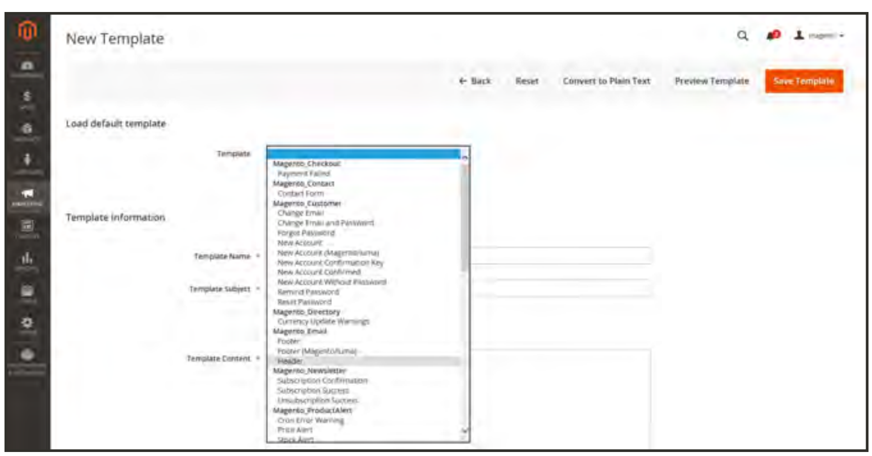
Step 1: Load the Template

Step 2: Customize and Preview the Template

Step 3: Update the Configuration

Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing.** Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
   a. Under **Load default template**, in the **Template** list under **Magento_Email**, choose "Header."



Default Header Template

b. Tap **Load Template**.

The HTML code and variables from the template appear in the form.

Step 2: Customize the Template

1. Under **Template Information**, do the following:

   a. Enter the **Template Name** for your custom header.

   b. Enter a **Template Subject** to help organize the templates. In the grid, the list of templates can be sorted and filtered by the Subject column.

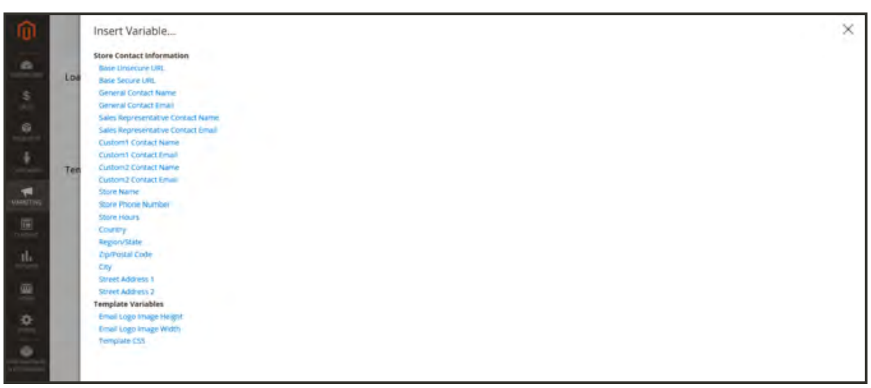
Header Template Information

   c. In the **Template Content** box, modify the HTML as needed.

> When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

   d. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a markup tag for the variable is inserted in the code.



Insert Variable

Although the Store Contact variables are the ones most often included in the header, you can enter the code for any system or custom variable directly into the template.

e. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.

2. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.

3. When complete, tap **Save Template**.

   Your custom header now appears in the list of available Email templates.

Step 3: Update the Configuration

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.

2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.

3. Scroll down and expand the **Transactional Emails** section.

4. Choose the **Header Template** that is used as the default for email notifications.

5. When complete, tap **Save Config**.

Transactional Emails

Field Descriptions

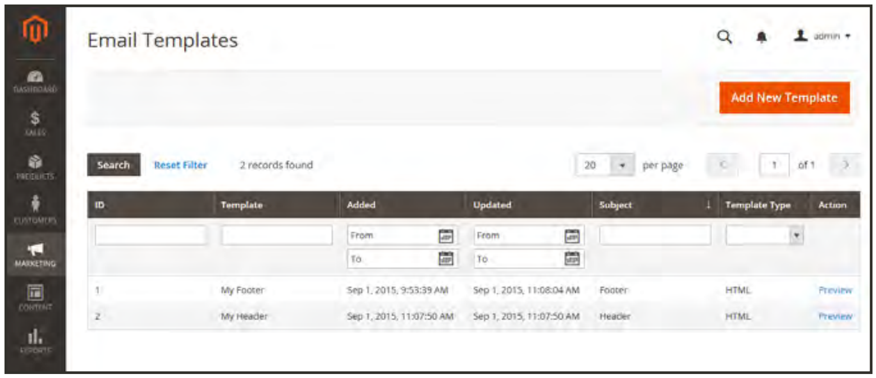
FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	

Field Descriptions (cont.)

FIELD	DESCRIPTION
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:

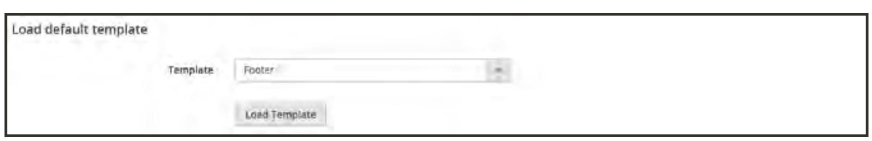
Step 1: Load the Default Template

Step 2: Customize and Preview the Template

Step 3: Update the Configuration

Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing.** Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
    a. Under **Load default template**, in the **Template** list under **Magento_Email**, choose “Footer.”
    b. Tap **Load Template**.



Default Footer Template

Step 2: Customize and Preview the Template

1. Enter the **Template Name** for your custom footer.
2. Enter a **Template Subject** to help organize the templates. In the grid, the templates can be sorted and filtered by the Subject column.

Footer Template Information

3. In the **Template Content** box, modify the HTML as needed.

> When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

4. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

   When a variable is selected, a markup tag for the variable is inserted in the code.

Insert Variable

   Although the Store Contact variables are the ones most often included in the footer, you can enter the code for any system or custom variable directly into the template.

5. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.

Step 3: Update the Configuration

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. In the grid, find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Scroll down and expand the **Transactional Emails** section.
4. Choose the **Footer Template** that is used as the default for email notifications.
5. When complete, tap **Save Config**.

Transactional Emails

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.

Message Templates

The process of customizing the body of each message is the same as the customizing the header or footer. The only difference is that there is a different message template for each activity or event that triggers a notification. You can use the templates as they are, or customize them to match your voice and brand. In addition to the template text, there's a wide selection of variables that can be incorporated into the template.

Process Overview:

Step 1: Load the Default Template

Step 2: Customize the Template

Step 4: Update the Configuration

Step 5: Preview and Save

Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing.** Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
   a. Under **Load default template**, in the **Template** list, choose the template that you want to customize.
   b. Tap **Load Template**.

Default Message Template

Step 2: Customize the Template

1. In the **Template Name** field, enter a name for your custom template.
2. By default, the **Template Subject** contains the first line of the message, which is the salutation. You can leave it as is, or enter something more descriptive.
3. Take note of the **Currently Used For** path to the template configuration. You will later follow this path to update the configuration.

Message Template Information

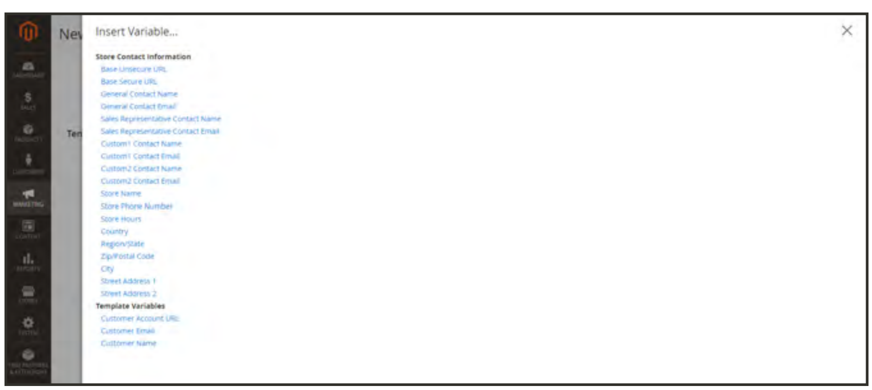
4. In the **Template Content** box, modify the HTML as needed. The content consists of a combination of HTML tags, CSS directives, variables, and text.

> When working in the template code, be careful not to accidentally type over the code that is enclosed in double braces.

Template Message Content

5. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

   When a variable is selected, a markup tag for the variable is inserted in the code.



Insert Variable

   In addition to the Store Contact variables, the list includes the Customer Account URL, Customer Email, and Customer Name. However, you are not limited to the variables in this list. You can enter the code for any system or custom variable directly into the template.

6. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.

Step 3: Update the Configuration

1. In the breadcrumb trail at the top of the Template Information section, find the following information, as it relates to your template. In this example the template configuration is located on the Customer Configuration page, in the Create New Account Options section, and in the Default Welcome Email field.

Page	Customer Configuration
Section	Create New Account Options
Field	Default Welcome Email

2. Tap the link to open the template configuration page.

3. Expand the section. Then, find the field for the email template that you customized, and specify the new template as the default.

Welcome Email Configuration

Step 4: Preview and Save the Template

1. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.

2. When complete, tap **Save Template**.

   Your custom template is now available in the list of Email templates.

Field Descriptions

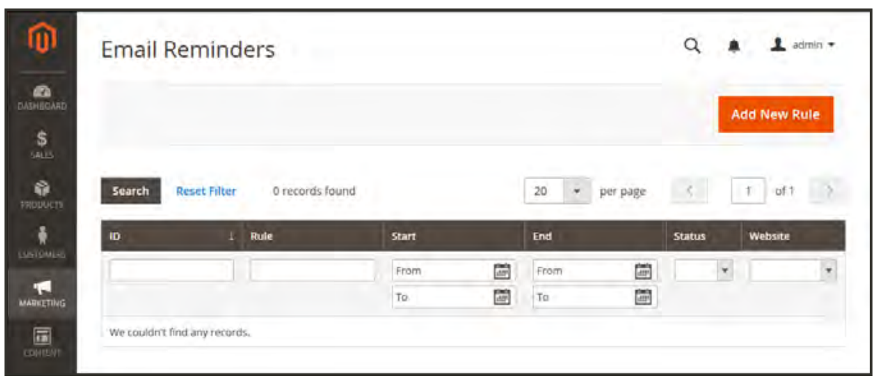
FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
Insert Variable	Inserts a variable into the template at the cursor location.
Template Subject	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.

CHAPTER 30:

Email Reminders

The purpose of an email reminder is encourage people who have visited your store to take advantage of a promotion and make a purchase. Email reminders can be automatically sent to customers when a specific set of conditions is met. For example, you might send a reminder to customers who have added something to their cart or wishlist, but have not yet made a purchase. You can use email reminders to encourage customers to return to your store, and include a coupon code as an incentive. Coupon codes can be automatically generated for each batch of email reminders, to give you control over the offers that are associated with each batch.

Email reminders can be triggered after a certain number of days have passed since a cart was abandoned, or for any other condition you want to define, such as total cart value, quantity, items in cart, and so on.



Email Reminders

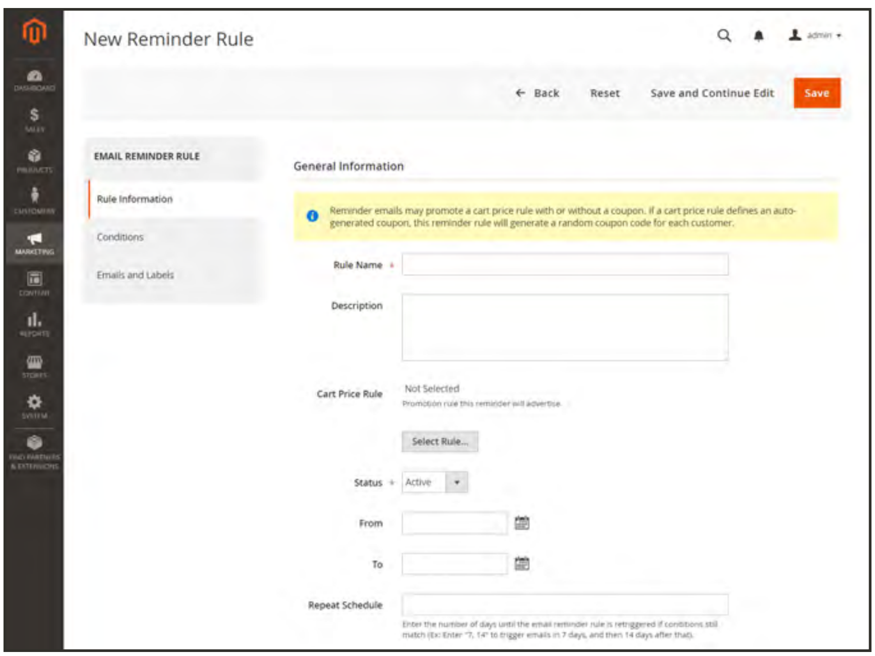
Creating Email Reminders

Before setting up an email reminder rule, you must first set up a cart price rule to define the promotion that is being offered. Rule conditions that trigger an email reminder can be based on cart properties, wishlist properties, or both.

> Email reminders might promote a cart price rule with, or without, a coupon. A cart price rule that defines an auto-generated coupon generates a random coupon code for each customer.

To create an email reminder:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Reminder Rules**.
2. In the upper-right corner, tap **Add New Rule**.
3. Complete the Rule Information, as follows:

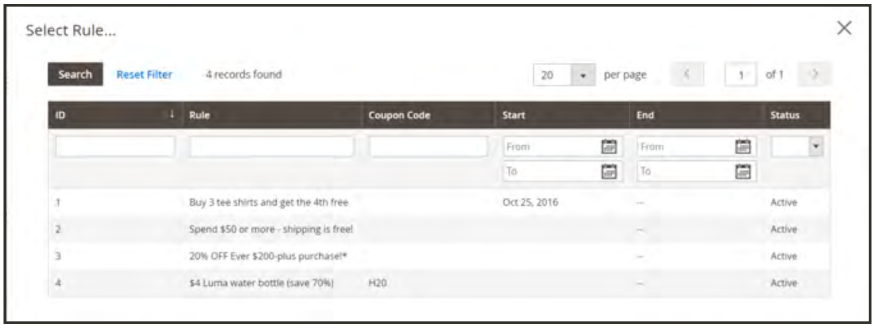


Rule Information

   a. Enter a **Rule Name** to identify the rule internally.

   b. Enter a brief **Description** of the rule.

   c. To choose the **Cart Price Rule** promotion that this reminder is to advertise, tap **Select Rule…**. Then, select the rule.



Select Cart Rule

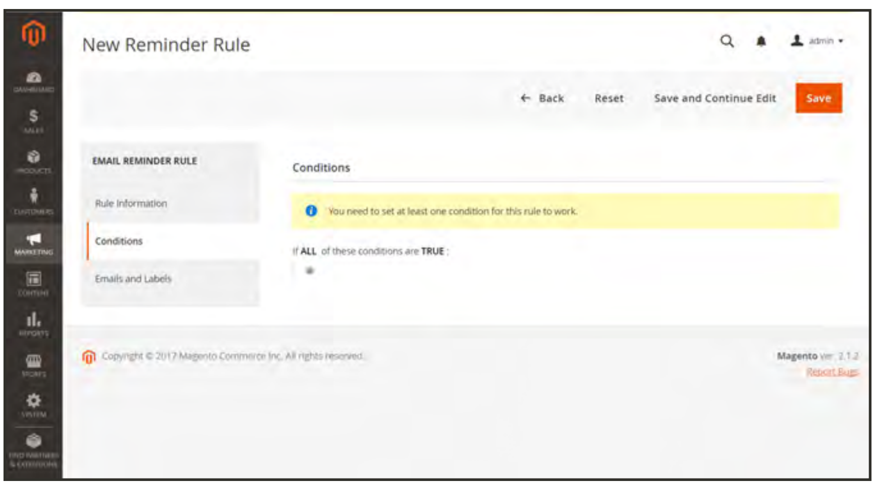
d. If you want the rule to go into effect immediately, set **Status** to "Active."

e. To set up a date range for the rule to be active, enter the **From** and **To** dates. You can also choose the date from the Calendar ( ).

f. To send the reminder more than once, enter the number of days before the next email blast in the **Repeat Schedule** field.

To repeat the reminder multiple times, separate the number of days with a comma. For example, enter "7" to trigger the rule again in seven days; enter "7,14" to trigger the rule in seven days, and again fourteen days later.

4. In the panel on the left, choose **Conditions**. At least one condition must be defined for the rule. The process is similar to building a catalog price rule.

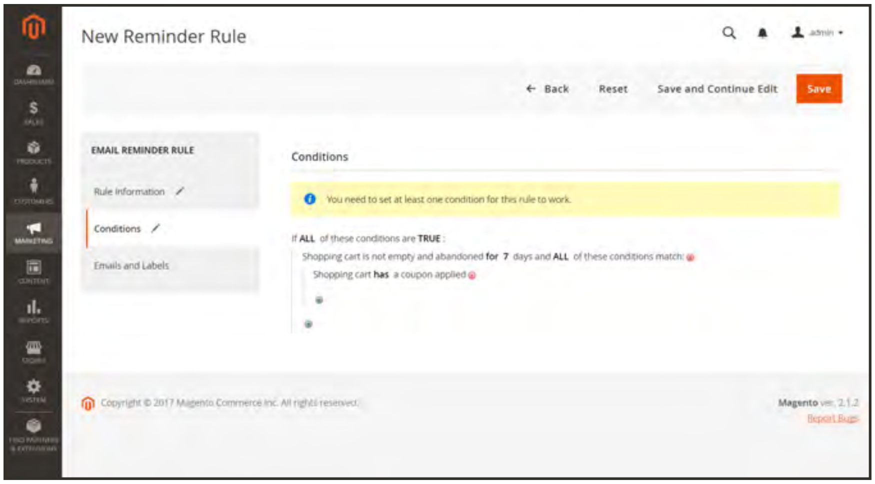


Conditions

a. Tap **Add** ( ) to display the list of options. Then, choose one of the following conditions:

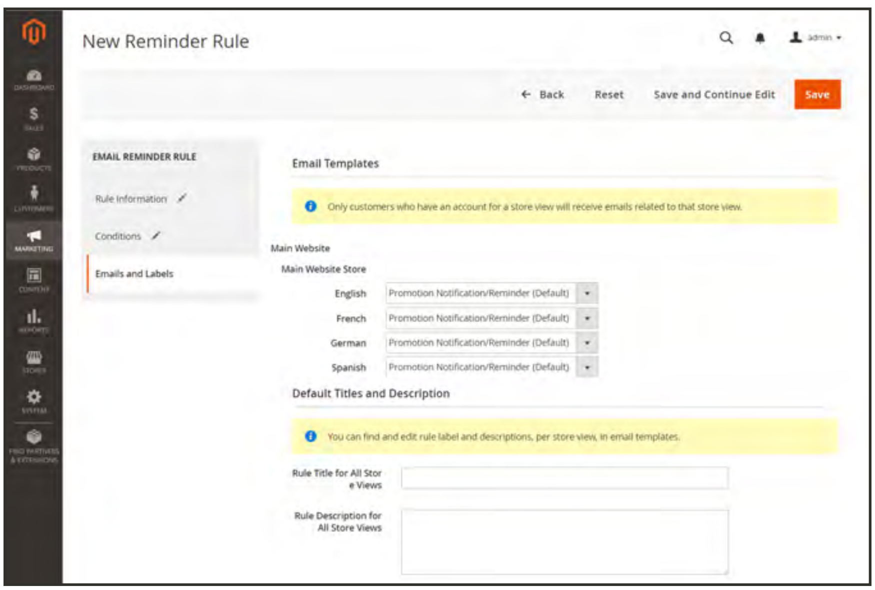
- Wish List
- Shopping Cart

b. Complete the condition to describe the scenario that triggers the email reminder.



Completed Condition

5. In the panel on the left, choose **Emails and Labels**



Email and Labels

6. In the Email Templates section, choose the email template to be used for each website and store view in your store hierarchy.

   If you don't want to send the reminder email to customers of a store view, leave the value "Not Selected."

7. In the Default Titles and Description section, do the following:

   a. Enter the **Rule Title for All Store Views**.

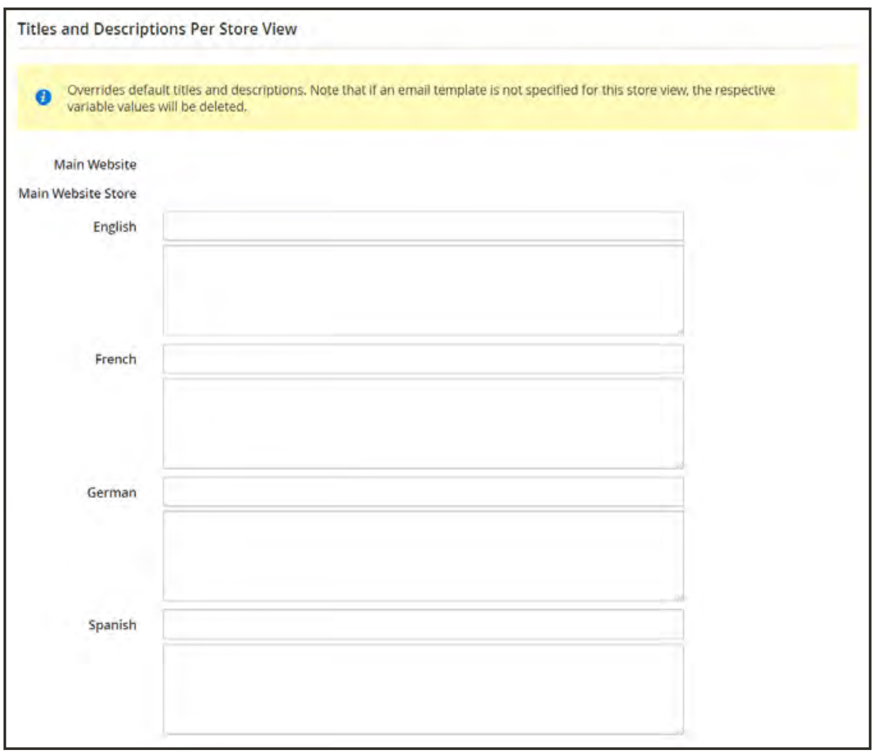
   > This value can be incorporated into email templates by using the `promotion_name` variable.

b. Enter the **Rule Description for All Store Views**.

Default Titles and Description

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
Wish List	Number of days abandoned Sharing Number of items Specific items
Shopping Cart	Number of days abandoned Specific coupon code applied Line items quantity Items quantity Total Virtual items Specific Items

Field Descriptions

FIELD	DESCRIPTION
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: Active / Inactive
From Date	The starting date for this automated reminder rule. If no date is specified, the rule becomes active immediately.
To Date	The ending date for this automated reminder rule. If no date is specified, the rule becomes active indefinitely.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Repeat Schedule	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

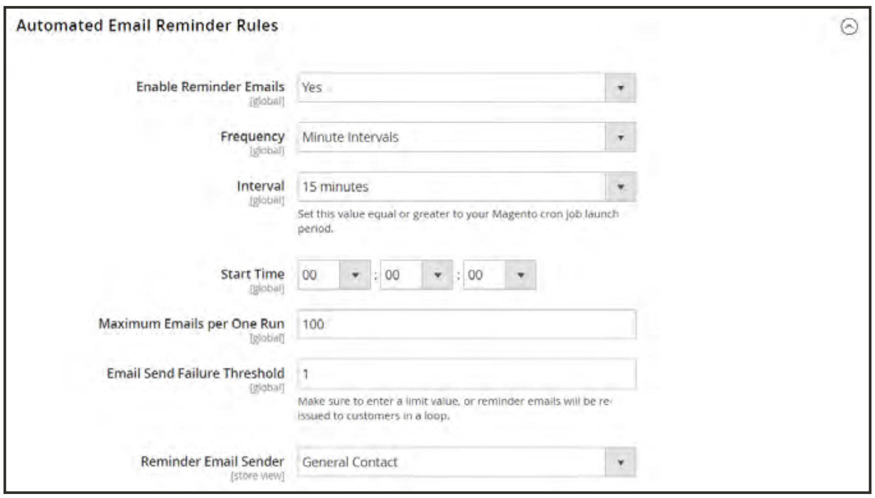
Email reminder rules can be sent at regular intervals by the minute, hour, or day. The configuration determines how many emails are sent in a batch, and the store identity that appears as the sender of the message.

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. Then, set **Start Time** to the hour, minute, and second the email is sent, based on a 24-hour clock.

d. To limit the number of emails that can be sent in a batch, enter the number in the **Maximum Emails per One Run** field.

e. To avoid repeated attempts to send failed email, enter the maximum number of attempts in the **Email Send Failure Threshold** field.

f. Set **Reminder Email Sender** to the store contact that appears as the sender of the reminder email.

4. When complete, tap **Save Config**.

Email Reminder Templates

The default email reminder template can be customized, and additional templates created for different promotions. Email reminders have a selection of specific variables that can be incorporated into the message. The information in these variables is determined by the email reminder rule that you set up, and by the cart price rule that is associated with the coupon. The Insert Variable button can be used to insert the markup tag with the variable into the template. To learn more, see: Email Templates.

Preview of Promotion Reminder

To customize an email reminder template:

1. On the Admin sidebar, tap **Marketing.** Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
   a. In the **Template** list under Magento_Reminder, choose the **Promotion Notification/Reminder** template.
   b. Tap **Load Template**.
3. Follow the standard instructions to customize the template.

Email Reminder Variables

VARIABLE	MARKUP TAG
Coupon Code	`{{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=""}}`

Configuring Email Communications

The Mail Sending Settings give you the ability to route returned email or replies to email to a specific address. Also, if your store is running on a Windows server, you can verify the host and port settings.

Security Notice! We recommend that all merchants immediately set their mail sending configuration to protect against a recently identified potential remote code execution exploit. Until this issue is resolved, we highly recommend that you avoid using Sendmail for email communications. In the Mail Sending Settings, make sure that Set Return Path is set to "No." To learn more, see the Magento Security Center posting.

Mail Sending Settings

To configure email communications:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Advanced**, choose **System**.

3. Expand the **Mail Sending Settings** section. Then, do the following:

   a. If necessary, set **Disable Email Communications** to "No."

   b. If running on a Windows server, verify the following settings:

Host	localhost
Port (25)	25

   c. Until the current security issue is resolved, we highly recommend that you set **Set Return Path** to "No."

No	(Recommended Security Measure) Routes returned email to the default store email address.
Yes	Routes returned email to the default store email address.
Specified	Routes returned email to the email address specified in the **Return Path Email** field.

4. In the panel on the left under **Sales**, choose **Sales Emails**. Then, do the following:

   a. Expand the **General Settings** section.

   b. Set **Asynchronous sending** to "Enable."

General Settings

5. When complete, tap **Save Config**.

CHAPTER 31:

Marketing Automation

Marketing Automation is a cloud-based tool powered by dotmailer that produces professional, personalized email communications and reports using data from your Magento store.

Dotmailer gives you the ability to:

- Create customized email communications
- Import contacts
- Schedule campaigns
- Create rules to add logic and automate your campaigns

Changes in the Latest Release

Release 2.2.4

New Features

- Support for custom transactional email templates
- Transactional email can now be set at store level
- Validation for CSV files deleted during cron jobs
- Abandoned Cart report

Creating a Campaign

Dotmailer includes a large selection of professionally-designed email and newsletter templates for a variety of promotions and events. You can use one of their prepared templates, or design your own.

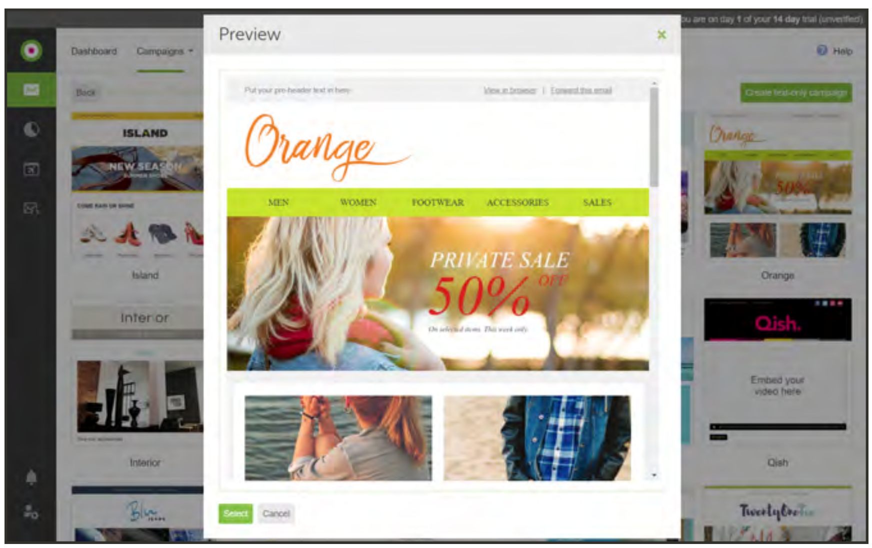
In this example, we will rework a prepared template for the Magento Luma demo store. The purpose of the example is to introduce you to different types of content building blocks and editing techniques.

Step 1: Create a Campaign

1. On the Welcome page, click **create a quick tester campaign**. Notice that the Campaigns option is now active in the main menu, and the email icon is highlighted in the sidebar.

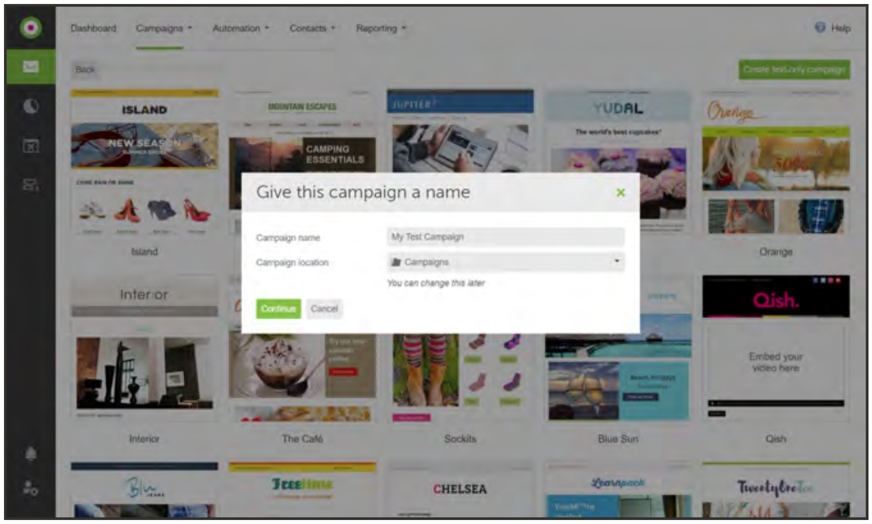
2. Hover over the thumbnail image, to show the Select and Preview buttons. Then, do the following:

   - Tap **Preview** ( ) to see a mockup of the template.
   - Tap **Select** to choose the template for your campaign.



Template Preview

3. Enter a **Campaign name**, and accept the default **Campaign location** as the folder where the campaign will be saved. Then, tap **Continue**.



Campaign Name

4. To complete the setup of your simple test campaign, do the following:

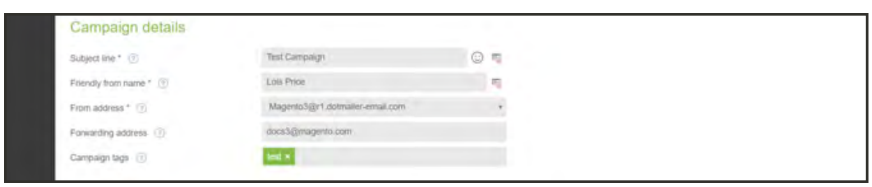
   a. Enter a **Subject** line for the email. Subject lines can be personalized for each recipient by using a placeholder. To learn how to add data fields, see Step 5.

   b. Enter your **Friendly from name** that will appear in the header instead of your email address.

   c. In the **From address** field, choose the email address that is to appear as the sender of the message. The list includes all email addresses that are associated with your account.

   d. (Optional) All replies to your campaign are automatically stored in your dotmailer account. If you would like to send each reply to specific individuals, enter each **Forwarding address**, separated by comma.

   e. (Optional) In the **Campaign tags** field, enter as many tags as needed to filter your campaigns for reporting purposes. Press the **Tab** key to separate multiple tags.

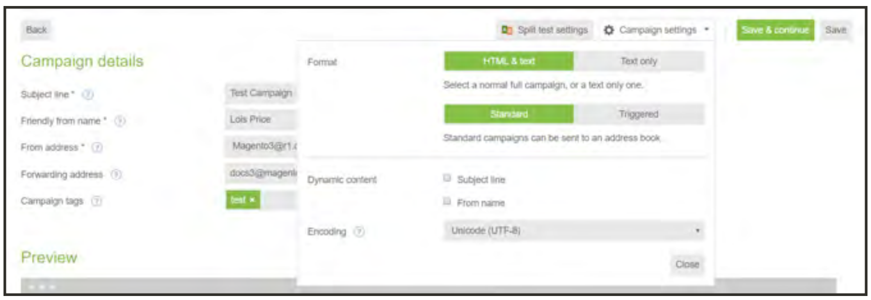


Campaign Details

As you type, the Preview section shows how your message will appear in the inbox of each recipient. Notice how your "Friendly from name" is used to distinguish it from other email.

Campaign Preview

5. Above the **Campaign details** section, click the **Campaign settings** tab. For this test campaign, we will use the default settings. Tap **Save**.



Campaign Settings

Step 2: Edit the Campaign Content

1. Before you get started, it's important to know that you can save your work at any time. If you log out and continue your work later, you can find the most recently saved version of your campaign in the menu under Campaigns > My Campaigns. To continue editing, find your campaign in the list, and click its name.

2. The content editor uses building blocks to represent each type of content that can be added to the template. The Build tab of the sidebar on the left displays the selection of building blocks that you can drag and drop into position. For this example, we will replace the sample content in the template with content of our own.

3. The following instructions walk you through each section of the template, and introduce editing and formatting tools, and techniques.

Complete the Preheader (Optional)

The space above the header can be used to enter a brief message. Click the text box, and enter the text that you want to appear above the header.

Preheader Text

Upload Your Logo

1. On the **Build** tab, choose **Images**. To upload your logo, click **Manage**. Then, **click here** to upload the image. Choose the image that you want to upload. Image manager is similar to Media Storage, and is used to organize the images that are available in your dotmailer account.

   > It is recommended to limit the combined size of all images in a campaign to less than 100kb.

Image Manager

2. To organize your images, click **New folder**. Then, enter a **name** for the untitled folder. The new folder is nested below the original parent folder.

   You can create as many folders as needed, and organize them any way you want. Over time, you will upload many images to your account, and it's important to organize them in a way that makes them easy to find.

3. In the sidebar, click the parent folder that contains the logo that you uploaded. Then, drag the image to the new folder. Then, click **Close** (X) in the upper-right corner to return to the content editor.

New Folder

4. The logo that you uploaded appears in the sidebar, where it can be dragged into position. Drag and drop your logo to replace the placeholder image.

Edit and Format Text

The next section of the template represents your store's menu. However, it's actually a building block with a multi-column layout, similar to a table. The text in each cell can be edited and formatted separately. The Columns building block can be used in many ways to control the text layout.

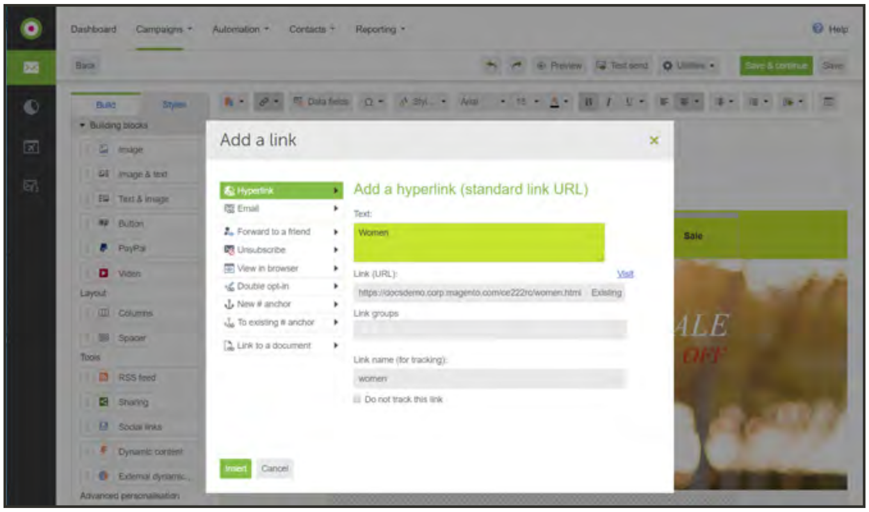
1. Click the menu area, so you can see the multi-column layout. The Columns building block is located in the sidebar under Layout.

2. Click each cell and enter the menu options for your store. Then, use the toolbar to change the font, size, and style of the text, as needed.

Add Links

To link each menu option in the template to your store, do the following:

1. Open your store In another window, and click the first menu option. Then, copy the full **URL**.
2. In the template, select the text for the first menu option. Then in the toolbar, click the **Hyperlink** ( ) tool.
3. In the **Link (URL)** field, paste the link that you copied from your store.
4. If you want to later be able to track how many people click the link, enter a code for that menu option. Then, tap **Insert**.
5. Repeat these steps to link each menu option to your store.



Add a Link

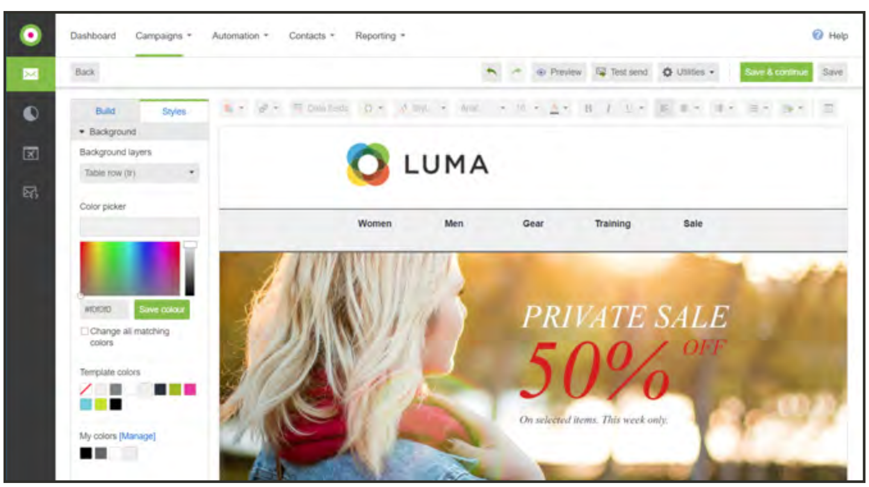
Change the Background Color

1. In the sidebar, choose the **Styles** tab. Notice that Background layers is set to “Table row (tr).” In the underlying HTML of the template, the menu background is actually a row in a table.

2. In the template, hover over the menu background to highlight the entire row.

3. In the sidebar under the color picker, enter the hexadecimal code for the background color of your store’s menu. In the Magento Luma store, the background color of the menu is #fofofo.

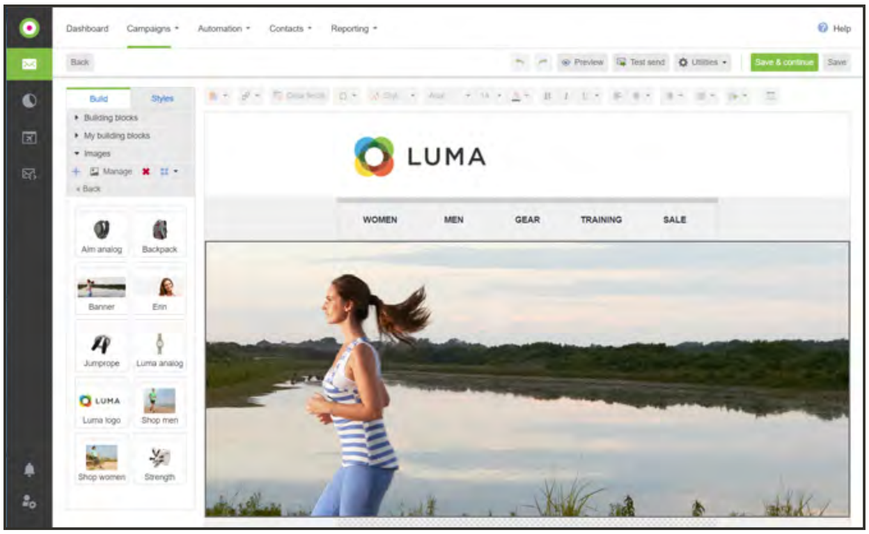
4. Tap **Save colour** to save the color in the My colors section of the sidebar.



Background Color

Replace the Banner

1. On the **Build** tab of the sidebar, under Images, click **Add Image** (+).
2. Choose the banner image that you want to upload. After a moment, the image appears in the sidebar.
3. From the sidebar, drag the new banner to replace the placeholder.



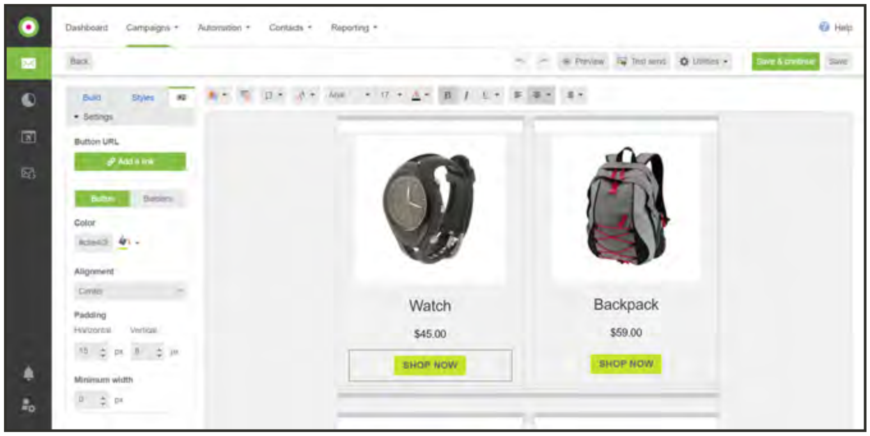
Banner

Add Featured Products

Dotmailer gives you the ability to dynamically incorporate data from your store into a template. However, for this simple example, product data is added as static images with links to your store. Although this template includes two rows of products, only one row is included to reduce the number of images. The "Shop Now" blocks was also removed from the template, because it didn't introduce any new editing techniques.

1. Upload the image for each featured product.
2. Edit the text, as needed, for each featured product.

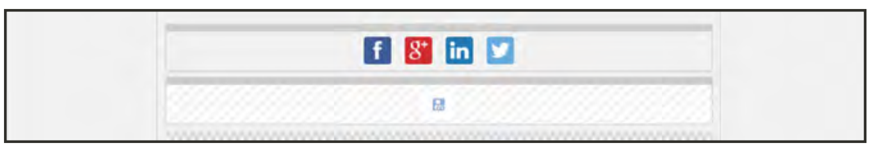
   The price can be updated as any other text field. To change the currency, simply type a dollar sign, or any other currency symbol that is needed.
3. To update the product buttons, do the following:
   a. Click the button to display its settings appear in the sidebar.
   b. Paste the **Button URL** for the corresponding product detail page. Then, update the color and formatting as needed.
   c. Repeat these steps for each product button.



Button Settings

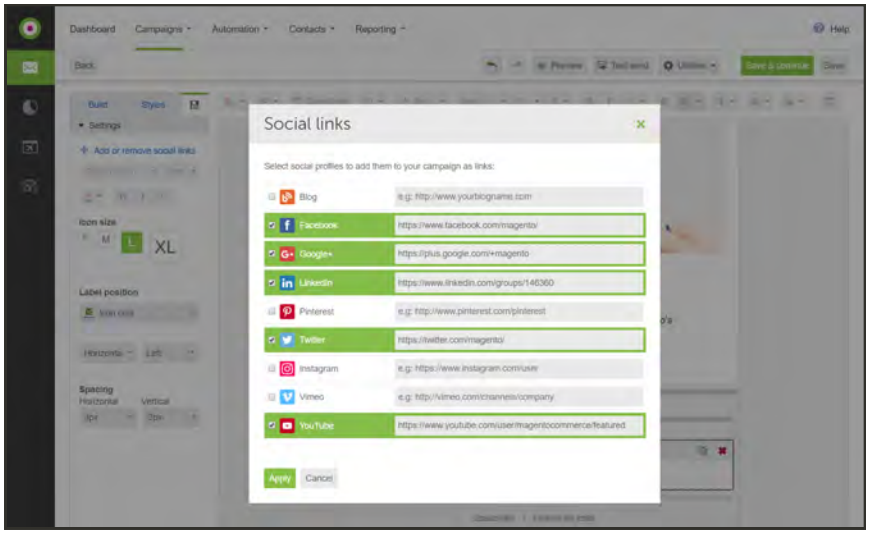
Add Social Media Links

1. In the template, scroll down to the social media placeholder.
2. In the building blocks sidebar under **Tools**, drag the **Social Links** building block into position in the template. The empty building block appears either above or below the placeholder.



Social Media Building Block

3. Click the empty building block to open the Social links settings. Then, do the following:
   a. Mark the checkbox of each social link that you want to include in the template.
   b. For each social link, paste the **URL** of your company profile page.
   c. When complete, tap **Apply**.



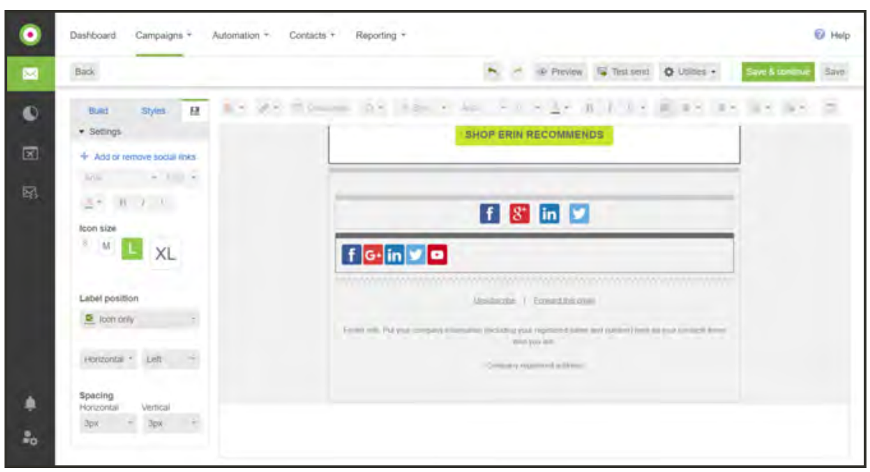
Social Links

4. To adjust the format and spacing of the buttons, click anywhere in the social links building block. You can experiment with these settings to adjust the size and format of the buttons. To make your buttons look like the template, do the following:

   a. In the sidebar under **Label position**, set **Horizontal** alignment to “Center.”

   b. Under **Spacing**, set **Horizontal** to “15px” and **Vertical** to “None.”

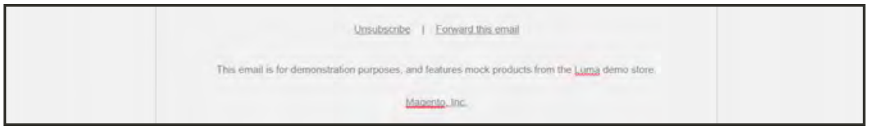
   c. To delete the placeholder social media links, click **Close** (X) in the upper-right corner.



Formatting the Social Media Links

Complete the Footer

The information at the bottom of the template is important, and in many countries is required by law. You must provide a mechanism for recipients to unsubscribe, and clearly identify the sender of the email.



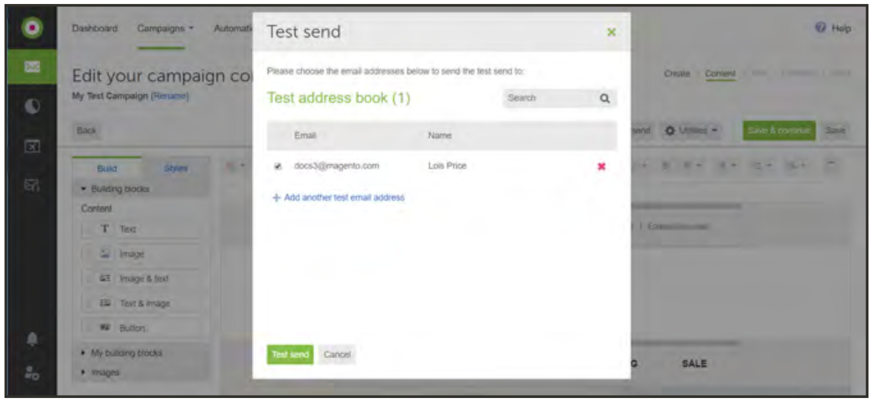
Footer Information

1. Do not change the “Unsubscribe” and “Forward this email “links, because they contain code that manages each operation. However, you can format the text if you like.
2. Click the **Footer info** text block, and enter your company information, including your registration number, if applicable, so recipients know who has sent the email.
3. Click the **Company registered address** text block, and complete the information. In this example, we added a link to the Contact Us page on our site.
4. The template is now fully customized for your store. Tap **Save**.

Step 3: Send a Test

1. To test your campaign, tap **Test send** in the template header.

2. To send the test email to yourself, mark the checkbox of the email address that is associated with your dotmailer account.
3. To add more recipients, click **Add another email address**. Then, do the following:
   a. Enter the **Email** address, **First name** and **Last name** of the recipient. Then, tap **Add**.
   b. Repeat these steps to add as many recipients as you want.
   c. Mark the checkbox of each additional recipient that is to receive the test email.
4. When you are ready to send the test campaign, tap **Test Send**. If prompted, tap **Save and send**.



Send a Test of Your Email Campaign

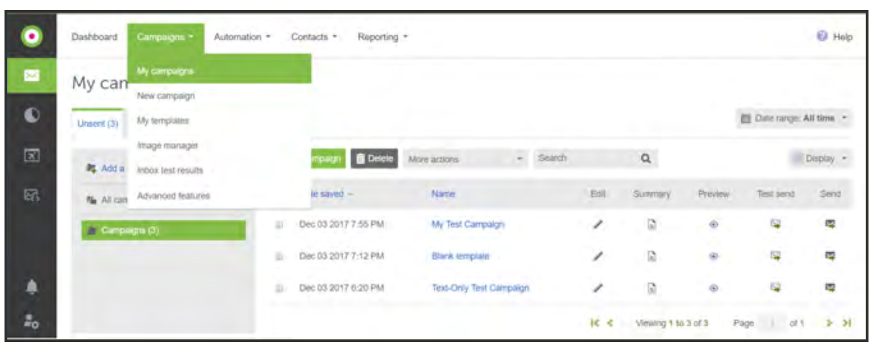
5. Check your email to see how it looks!

Step 4: Review the Summary Report

The Summary Report validates the campaign, lists any errors that are found, and suggests areas for improvement.

In addition to the Summary Report, the Reports menu has a selection of Marketing Automation reports.

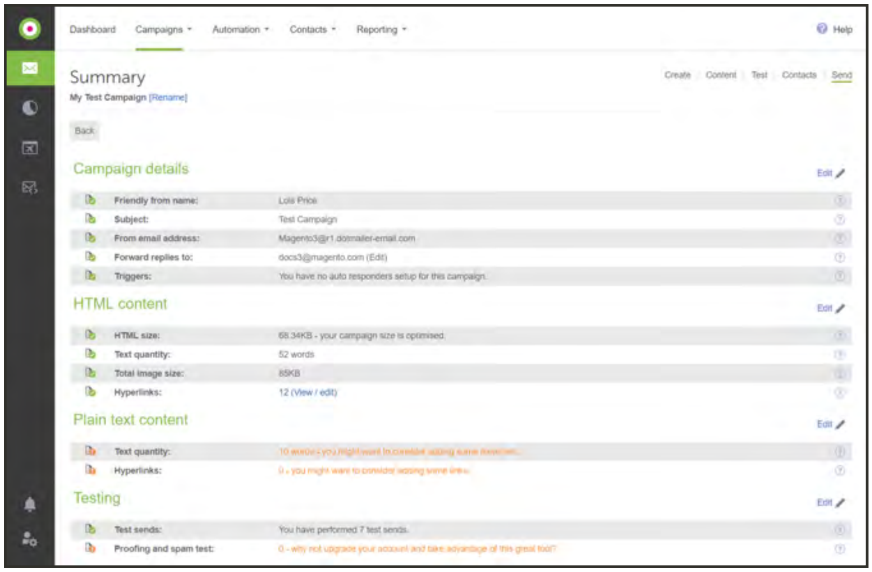
1. On the **Campaigns** menu, choose **My Campaigns**.



My Campaigns

2. In the record for your test campaign, click **Summary** ( ) to view the summary report.

   This report says that the quality of the text content needs to be improved.



Summary Report

Step 5: Add a Personal Note

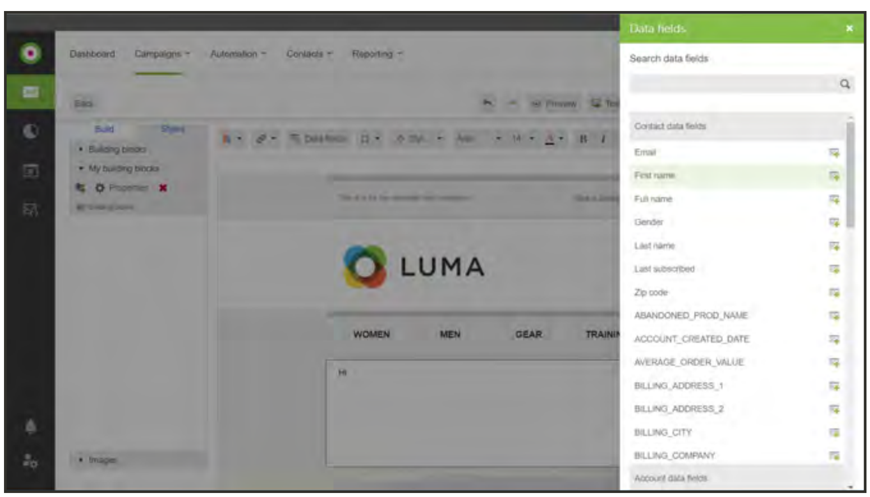
In this step, we'll add a personal note with a link, and then do another test run.

1. Drag a text building block from the sidebar to the template. Then, do the following:

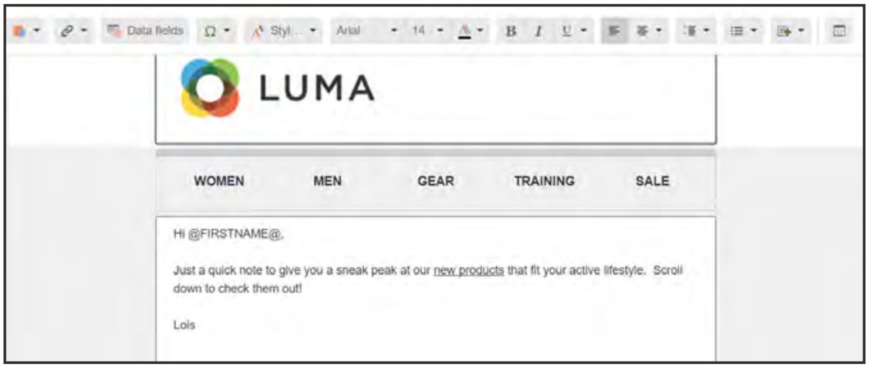
   a. Enter the word "Hi" to begin the greeting.

   b. In the toolbar at the top of the template, tap **Data Fields**.

   c. In the list of data fields, choose **First name**.



   d. Complete the note, and add a link. Then, **Save** your work.



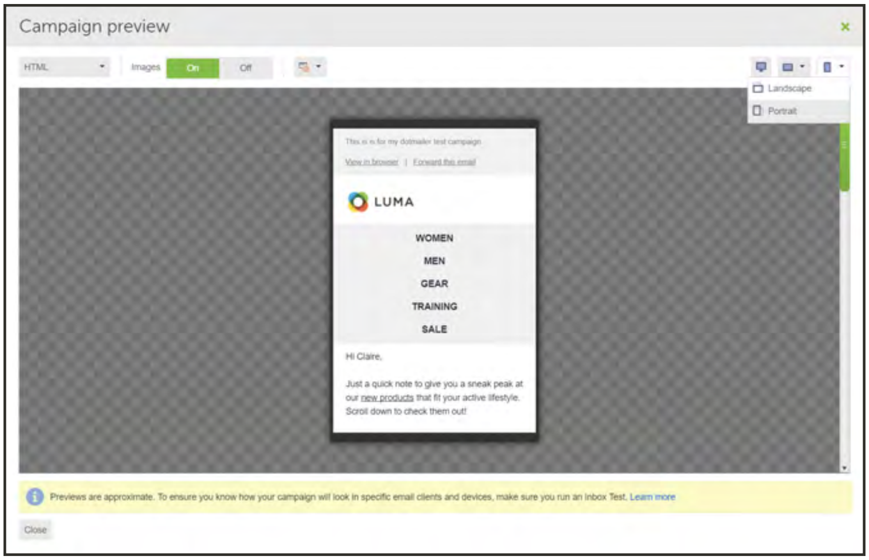
Personalized Greeting

Step 6: Preview the Campaign

1. In the button bar at the top of the workspace, tap **Preview**.

Desktop Preview

2. In the upper-right corner, click **Phone** ( ), and choose **Portrait**.to see how the message looks on a mobile device.



Phone Preview

3. **Close** the preview.

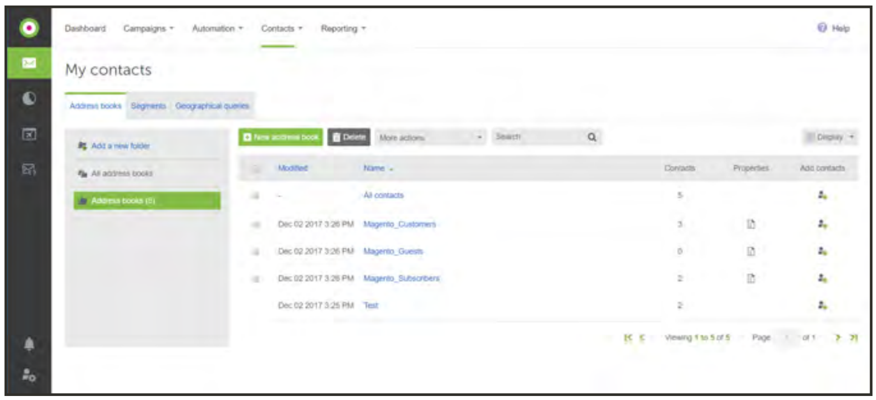
Import Your Contacts

Your dotmailer account is synced with your store, and maintains up-to-date address books of your customers, guests, and subscribers.

To view your contacts:

1. On the dotmailer menu, choose **Campaigns** > **My Campaigns**.

   The contact list includes customer, guest and subscription data that is automatically imported from your store.



Address Books

2. To view the import report, click the **Notifications** bell ( ) near the bottom of the sidebar. Whenever the data is updated, the number of updated imports appears in red.

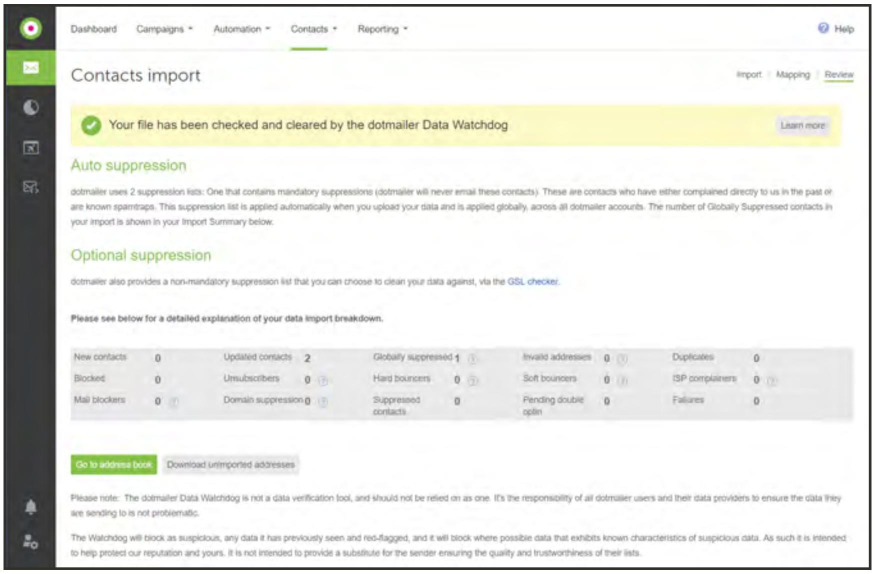
   There are two recent imports. available. Although this list doesn’t tell you what they are, one is your list of customers, and the other is your list of subscribers.

3. In the first message, click **import report**.

Notifications Report

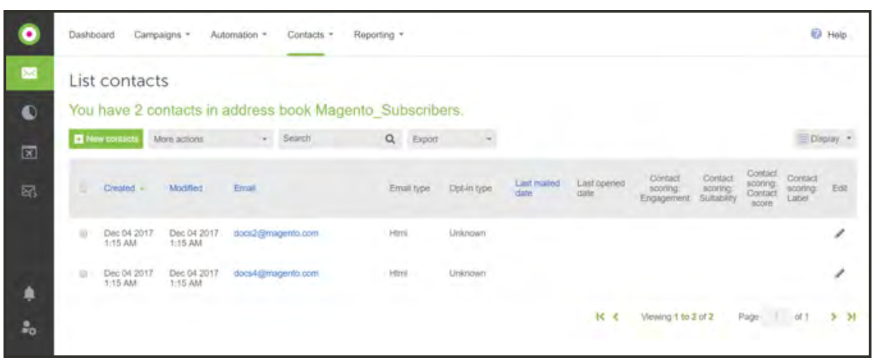
4. In the Notifications list, click **import report**.

The Contacts import report includes a summary of all subscribers as well as duplicates, failures, soft and hard bounces, invalid email addresses, and those who have unsubscribed, or have been blocked, globally suppressed, or otherwise blacklisted. You can use this report to help keep your data clean.



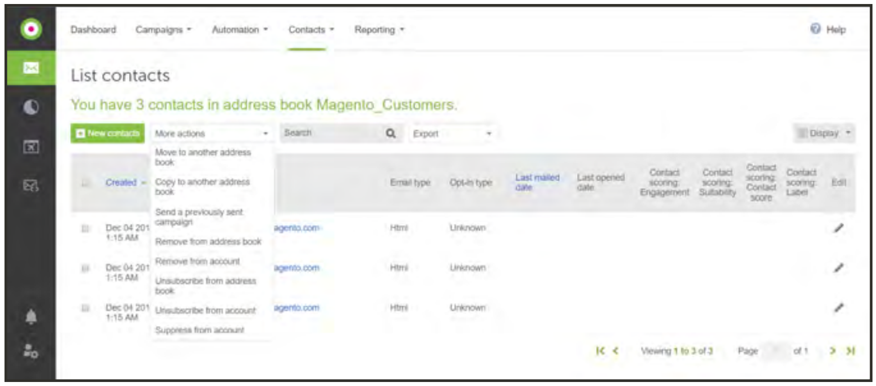
Import Report

5. After reading the report, tap **Go to address** book. This import contains your subscribers, and the other one contains your customers.



Subscriber Address Book

6. In the main menu, return to **Contacts** > **My Contacts**. This time, click the **Magento_ Customers** address book.



Customer Address Book Actions

7. To see all the things you can do with your customer data from dotmailer, click **More actions**.

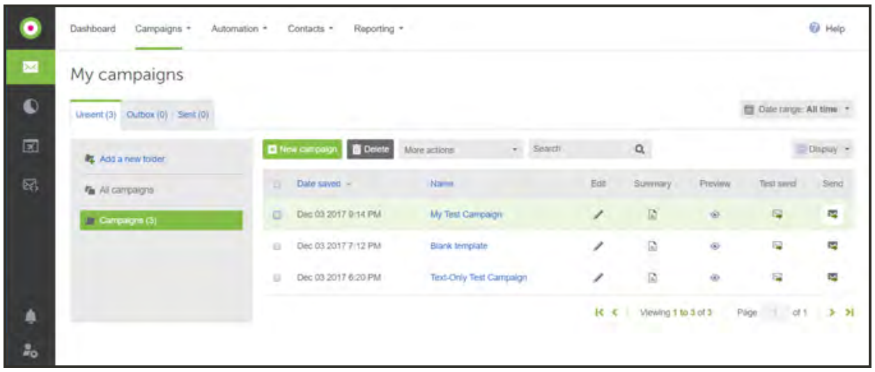
   Using what we've covered so far, you should be able to create a newsletter campaign and send it to your list of subscribers.

Schedule Your Campaign

You now have a campaign and a list of customers. The next step is to schedule the campaign, and send it on its way.

To schedule a campaign:

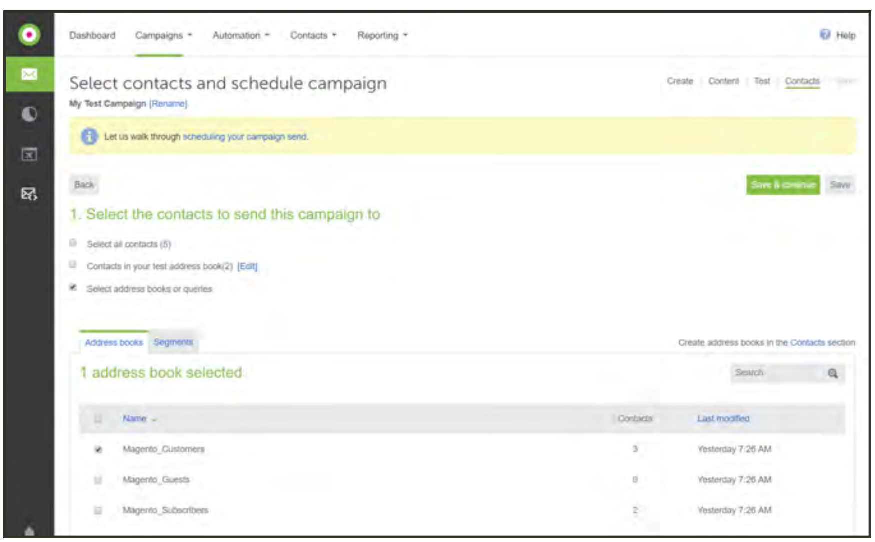
1. On the dotmailer menu, choose **Campaigns** > **My Campaigns**.



Send Your Campaign

2. Find your test campaign in the list, and in the last column, click **Send** ( ). Then, do the following:

   a. With **Select address books or queries** marked under step 1, choose the address book that is the target of the campaign. For this test campaign, mark the **Magento_Customers** checkbox.



Choose the Address Book

   b. Complete the options to select when you want to send the campaign.

Schedule the Campaign

c. If you want to remail the campaign, select "Yes." By default, campaigns are not sent a second time.

Remail Options

d. Tap **Save & continue**.

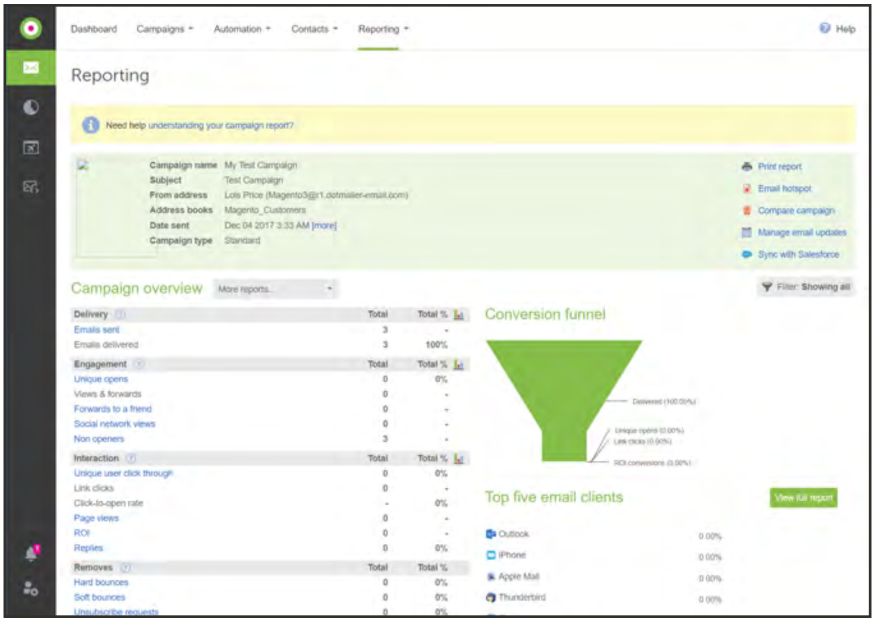
e. Take one last look at the report before you send the campaign. Then, scroll down to the bottom and tap **Send campaign immediately**. When prompted to confirm, tap **Send**.

Send Immediately

3. Congratulations! Your campaign is on its way!

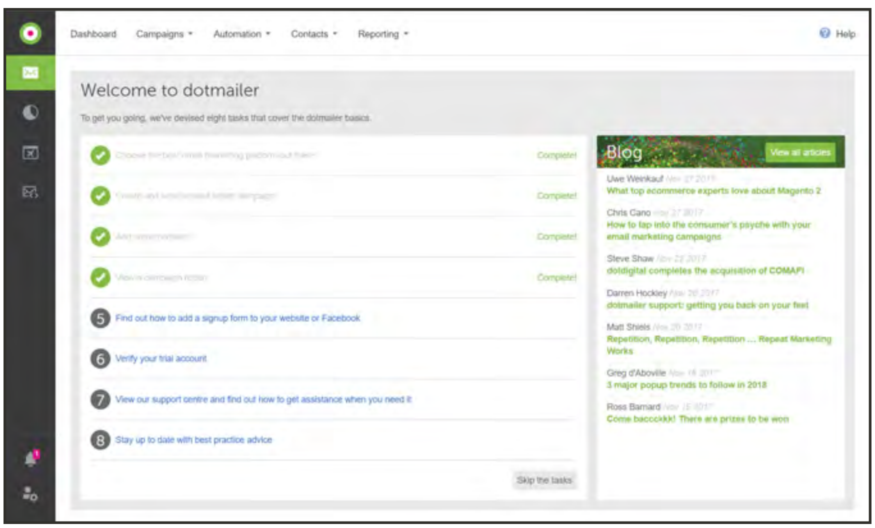
Your Campaign Is On Its Way

4. To see the results, tap **Check out the campaign report**.



Campaign Report

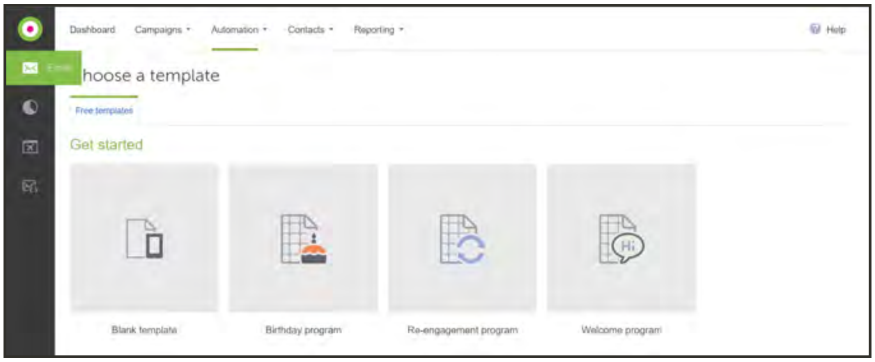
5. On the menu, choose **Dashboard** to see your progress. You have completed the first four tasks, and a notification is waiting for you at the bottom of the sidebar.



Dashboard

Automate Your Campaign

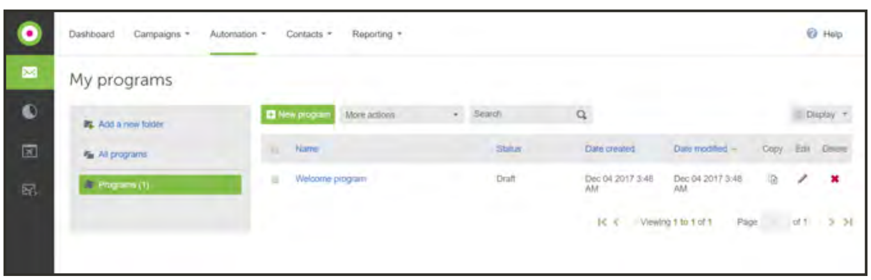
dotmailer includes three prepared automation templates, plus a blank template that you can use to create custom programs. When setting up an automated campaign, you can use existing campaigns, or create placeholders for new ones. This example uses a prepared template to create a simple Welcome campaign with a follow-up message that is sent a week later.



Choose a Template

Step 1: Create a New Program

1. On the dotmailer menu, choose **Automation**. Then, tap **New program**.

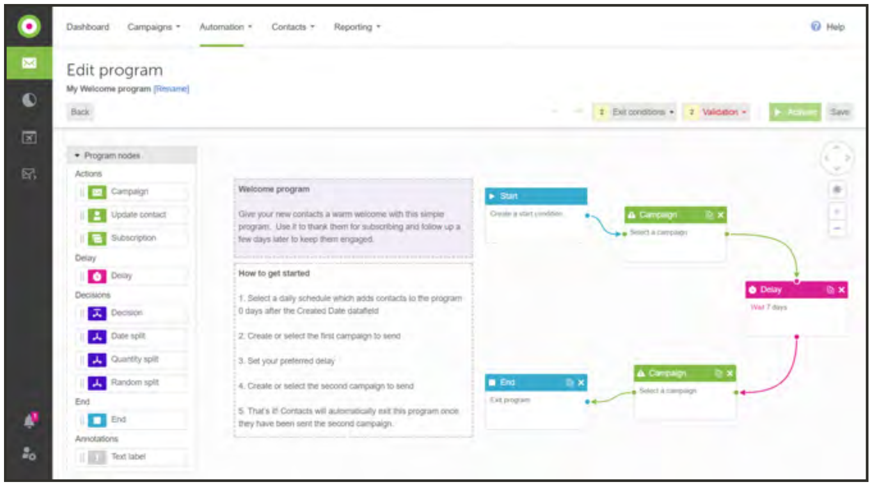


My Programs

2. To choose the **Welcome program** template, hover over the tile and tap **Select**. Then, do the following:

3. When prompted, enter the **Program name**. For now, you can accept the Programs folder location. Then, tap **Continue**.

   The Edit program workspace includes a flowchart of the program logic. Each box in the diagram is a node. The panel on the left has a selection of nodes that can be added to the program. You can create sophisticated automations using these simple building blocks.

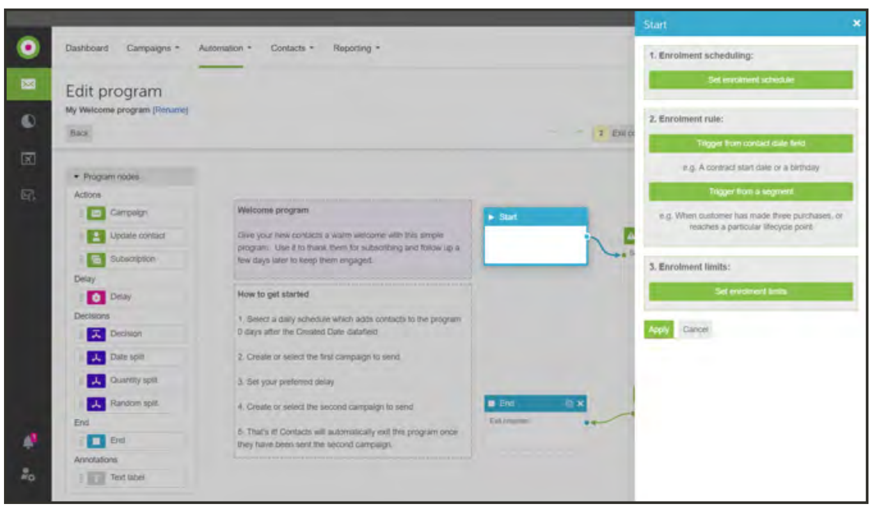


Edit Program

Step 2: Complete the Start Options

1. In the flowchart, click the **Start** node.

   The panel on the left provides an overview of the process, and walks you through each step.

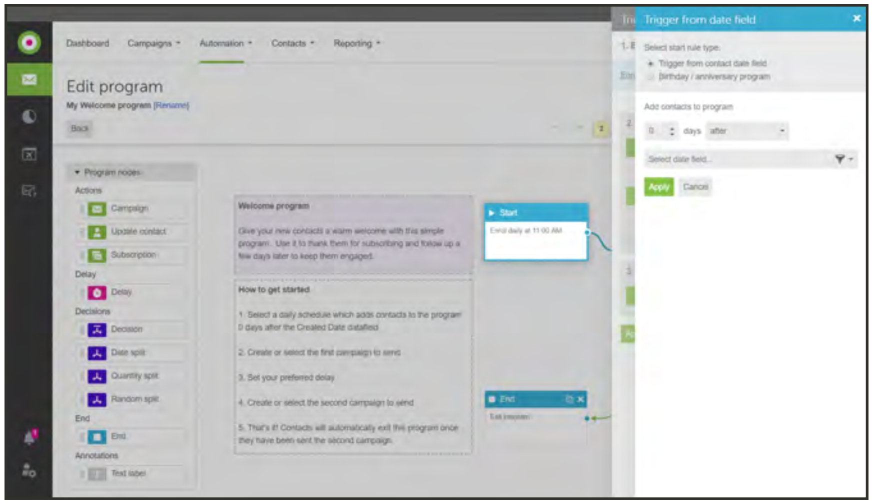


Start

2. Under **1. Enrolment scheduling**, tap **Set enrolment schedule**.

   a. By default, the Welcome program is scheduled to run **Daily** at **11:00 AM**. ‘

   b. For this example, accept the default scheduling. Then, tap **Apply**.

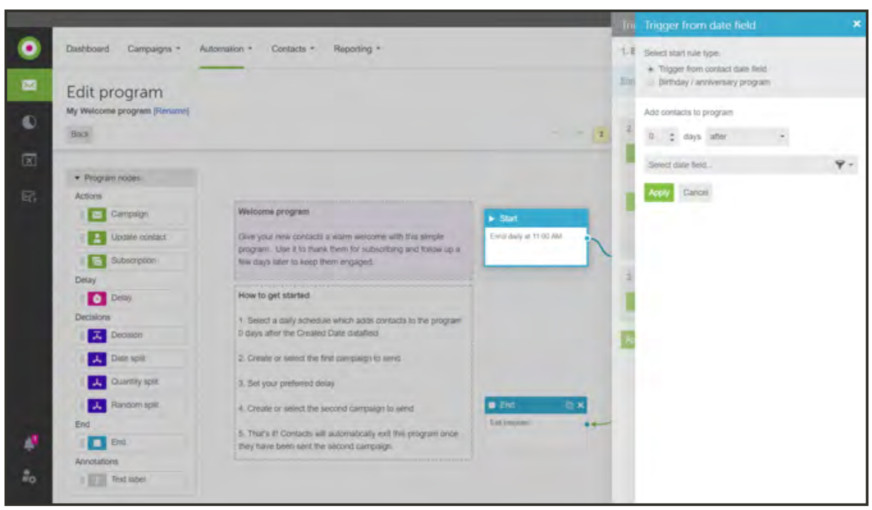


Enrollment Scheduling

3. Under **2. Enrolment rule**, tap **Trigger from contact date field**.

   The options describe the event that triggers the rule. For this program, the welcome email campaign will be triggered whenever a new account is created.

   Complete the trigger description as follows:



Trigger from Date

   a. Accept the option to **Trigger from contact date field**.

   b. To determine when contacts are added to the program, accept the default entry, **default entry 0 days after**.

   c. Set the **Date** field to `ACCOUNT_CREATED_DATE`.

   d. When complete, tap **Apply**.

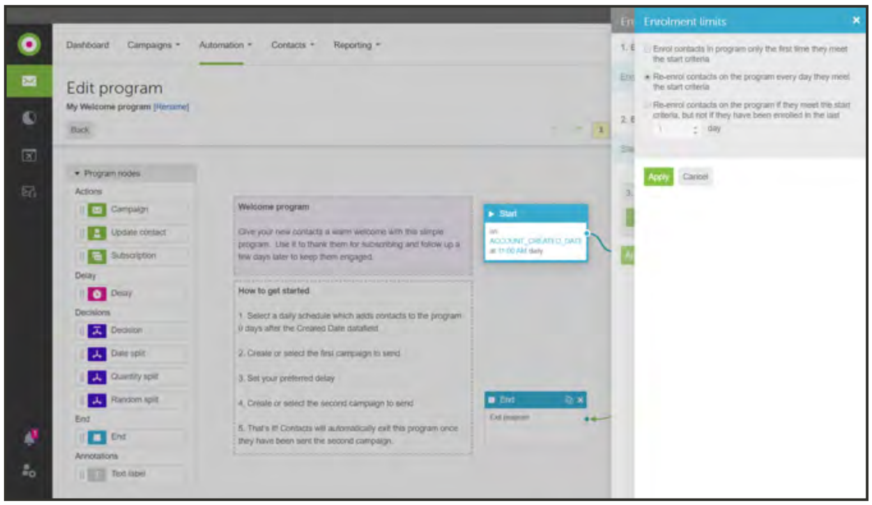
4. Under **3. Enrolment limits**, tap **Set enrolment limits**. Then, do the following:

a. For this program, accept the default option to **re-enrol contacts every day they meet the start criteria**.

This option ensures that every person who signs up for a new account will be included in the next scheduled mailing.

b. Tap **Apply**.

5. Review the options in the **Start** panel. Then, tap **Apply**.

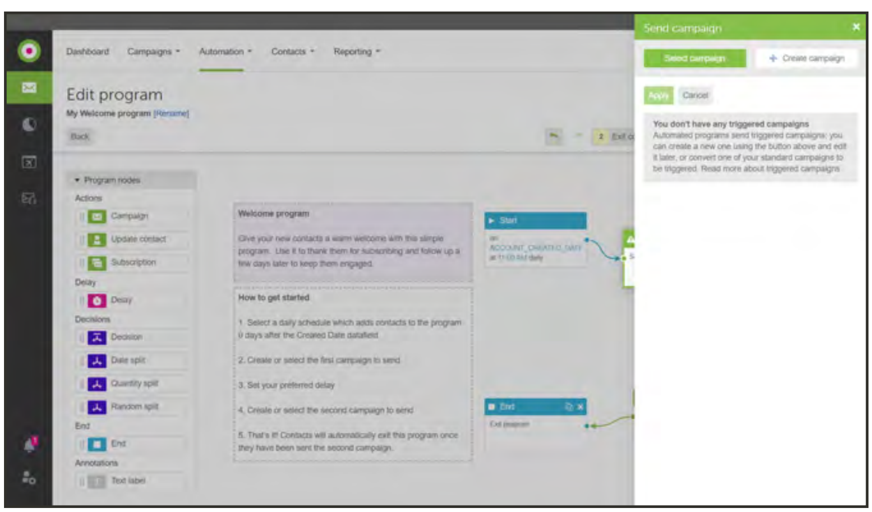


Enrolment Limits

Step 3: Choose the Campaign

1. In the flowchart, click the **Campaign** node. Then, do the following:

a. To choose an existing campaign, tap **Select campaign**.

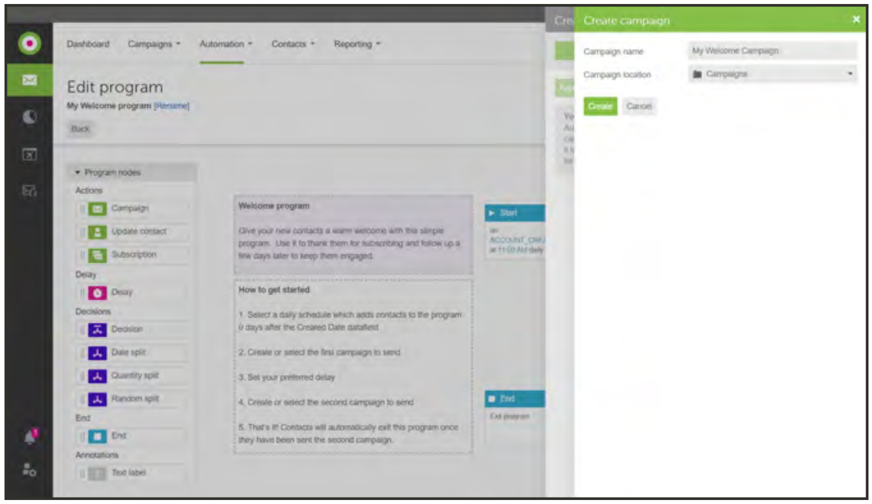


Send Campaign

b. Tap **Create campaign**.

c. Enter the **Campaign name**, and accept the Campaigns folder as the default **Campaigns location**.

d. Tap **Create**.



Create Campaign

2. Tap **Apply**.

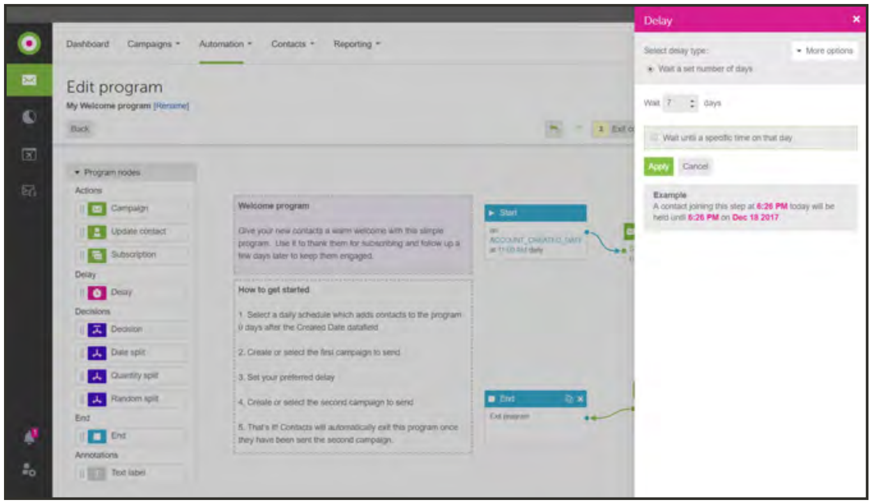
The name of the new campaign appears in the Campaign box.

Step 4: Set the Delay

You can add a delay to the program to wait a number of days, or until a specific time of day, before sending a follow-up campaign.

1. In the flowchart, click the **Delay** node.

2. Accept the default **Wait** period of **7** days. Then, tap **Apply**.



Delay

Step 5: Create a Follow-Up Campaign

1. In the flowchart, click the next **Campaign** node.

2. Enter the **Campaign name**, and accept the **Campaigns** folder as the default **Campaigns location**.

3. Tap **Create**. Then, tap **Apply**.

   Your follow-up campaign is added to the workflow.

Step 6: Define the End of the Program

All programs have defined starting and end points.

1. Click the **End** node.

2. For this example, you can accept the default name of the end point.

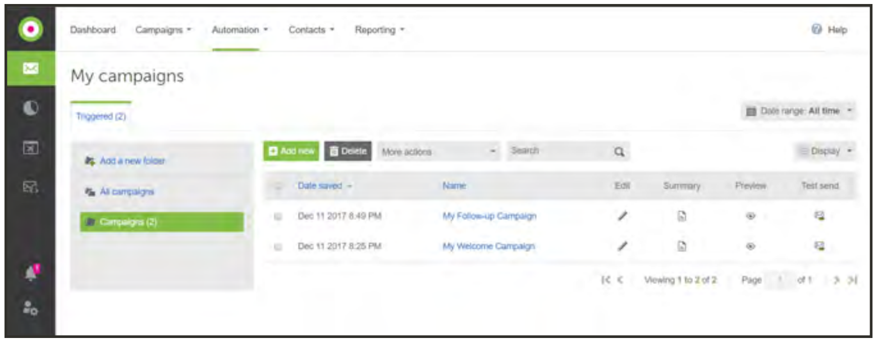
3. Tap **Apply**.

Step 7: Edit Your Campaign

If you added placeholders for new campaigns, you still need to complete the definition of each campaign. However, if you used existing campaigns, your Welcome program is good to go!

1. On the **Automation** menu, choose **Trigger campaign content**.

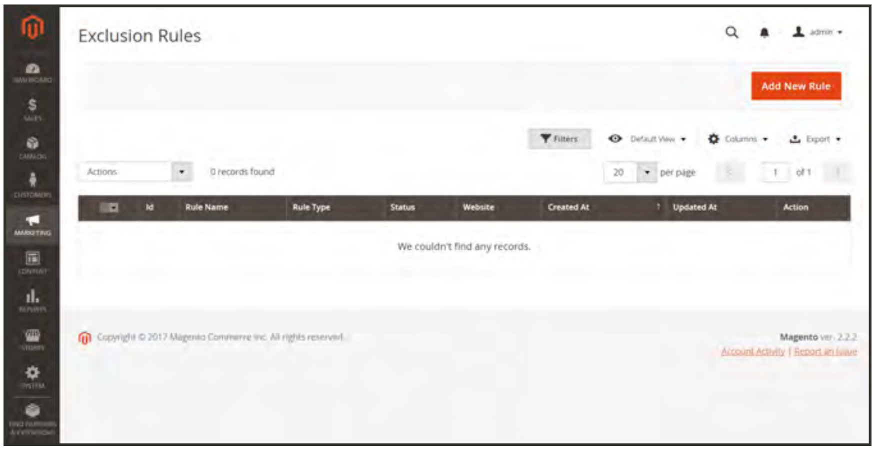
2. Find the campaign in the list, and click **Edit** ( ).



My Campaigns

Exclusion Rules

An exclusion rule can be created to exclude abandoned cart and review emails from being sent under certain conditions. A rule describes the conditions that must be met to trigger the action. For example, a rule might exclude all abandoned carts with a subtotal that is equal or less than 10. To learn more, see Exclusion Rules in the dotmailer help centre.



Dotmailer Exclusion Rules

To add a new rule:

1. On the Admin sidebar, choose **Marketing**. Under **Marketing Automation**, choose **Exclusion Rules**. Then, tap **Add New Rule**.

2. On the **Rule Information** tab, do the following:

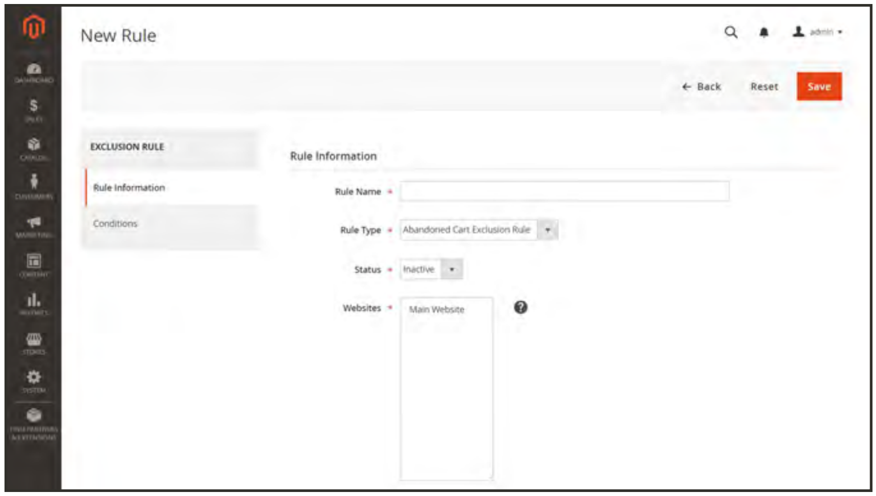
    a. Enter a descriptive **Rule Name**.

    b. Set **Rule Type** to one of the following:

    - Abandoned Cart Exclusion Rule
    - Review Email Exclusion Rule

    c. Leave **Status** set to “Inactive” for now. You can later change it to “Active.”

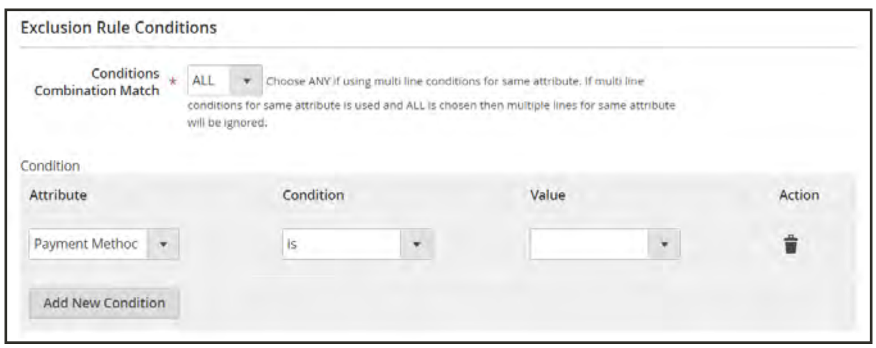
    d. Choose the **Websites** where the rule applies.



Rule Information

3. On the **Conditions** tab, set **Conditions Combination Match** to one of the following:

- ANY
- ALL



Exclusion Rule Conditions

4. Tap **Add New Condition.** Then, do the following:

   a. Choose the **Attribute** that is the subject of the conditional statement.

   b. Under **Condition**, choose the operator.

   c. Enter the **Value** that is needed to complete the condition.

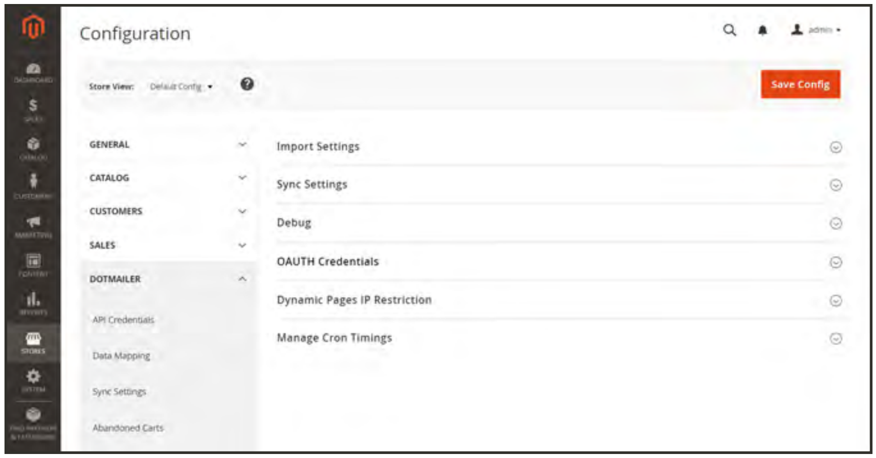
Conditions

   d. For multiple conditions, tap **Add New Condition**. Then, repeat these steps.

5. When complete, tap **Save**.

Automation Studio

The Automation Studio option in the Marketing menu is a shortcut to the Dotmailer Developer configuration settings.



Dotmailer Developer Configuration

To access Automation Studio:

On the Admin sidebar, choose **Marketing**. Then under **Marketing Automation**, choose **Automation Studio**.

CHAPTER 32:

Sales Documents

In addition to the email messages related to a sale, your store generates invoices, packing slips, and credit memos in both HTML and PDF formats. Before your store goes live, make sure to update these documents with your logo and store address. You can customize the address format, and also include additional information for reference.

- Invoices
- Packing Slips
- Credit Memos

Preparing Your Invoice Logo

Unlike the logo images used in HTML, the logo for PDF invoices and other sales documents can be a high-resolution, 300 dot per inch (DPI) image. However, the image must be rendered to fit a space that is 200 pixels wide by 50 pixels high. Be careful to preserve the aspect ratio when you resize the logo. Resize the logo to fit the height, and don't worry about any unused space to the right.

200 x 50 pixels

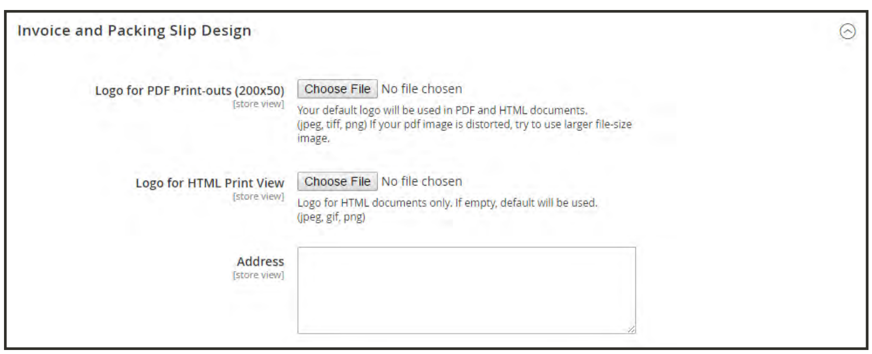
One way to resize your logo to fit the required size is to create a new, blank image with the correct dimensions. Then, paste your logo image and resize it to fit the height. With most image editing programs, you can either scale it by a percentage to preserve the aspect ratio, or hold down the Shift key and manually resize the image.

To configure invoices and packing slips:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left, under **Sales**, choose **Sales**.

3. Expand the **Invoice and Packing Slip Design** section. Then, do the following:



Invoice and Packing Slip Design

a. To upload the **Logo for PDF Print-outs**, tap **Choose File**. Find the logo that you have prepared, and tap **Open**.

b. To upload the **Logo for HTML Print View**,tap **Choose File**. Find the logo that you have prepared, and tap **Open**.

4. Enter your address as you want it to appear on invoices and packing slips.

5. When complete, tap **Save Config**.

   For reference, a thumbnail of the uploaded image appears before each field. Don't worry if the thumbnail appears distorted. The proportion of the logo will be correct on the invoice.

To replace an image:

1. Tap **Choose File** and choose a different logo file.

2. Mark the **Delete Image** checkbox for the image you want to replace.

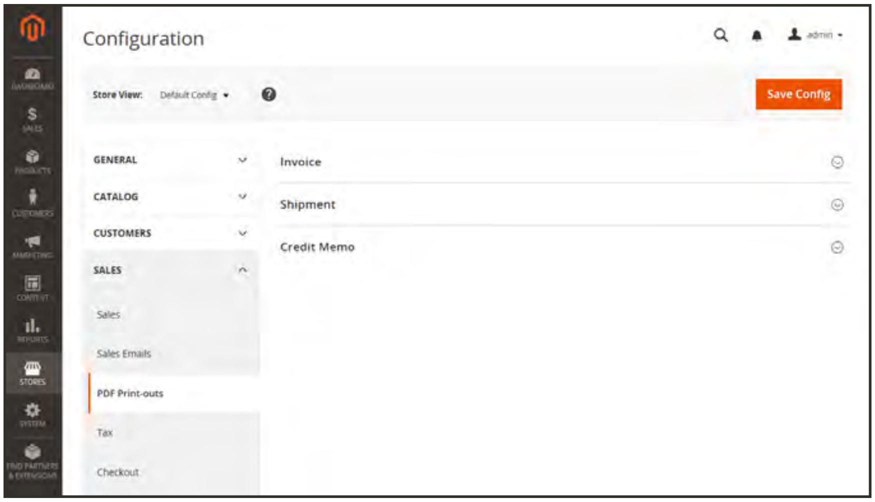
3. Tap **Save Config**.

Image Formats

FORMAT	REQUIREMENTS
PDF	
File Format	JPG (JPEG), PNG, TIF (TIFF)
Image Size	200 pixels wide x 50 pixels high
Resolution	300 DPI recommended
HTML	
File Format	JPG (JPEG), PNG, GIF
Image Size	Determined by theme.
Resolution	72 or 96 DPI

Adding Reference IDs to Header

The Order ID and customer IP address can be included in the header of sales documents that accompany an order. By default, both the Order ID and customer IP address appear in the header of invoices, shipment packing slips, and credit memos.



PDF Print-outs

To change the Order ID settting:

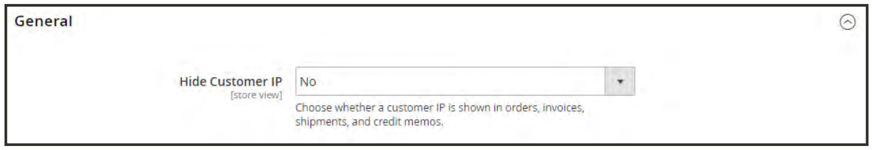
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **PDF Print-outs**.
3. Expand the **Invoice** section.

Invoice

4. Set **Display Order ID in Header** according to your preference.
5. Repeat for the **Shipment** and **Credit Memo** sections.
6. When complete, tap **Save Config**.

To change the customer IP address setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand the **General** section.



General

4. Set **Hide Customer IP** to your preference.
5. When complete, tap **Save Config**.

Customer Address Templates

You can modify the template that determines the format of customer billing and shipping addresses that appear on printed invoices, shipments, and refunds, as well as in the address book of the customer account.

Example 1: Text Templates

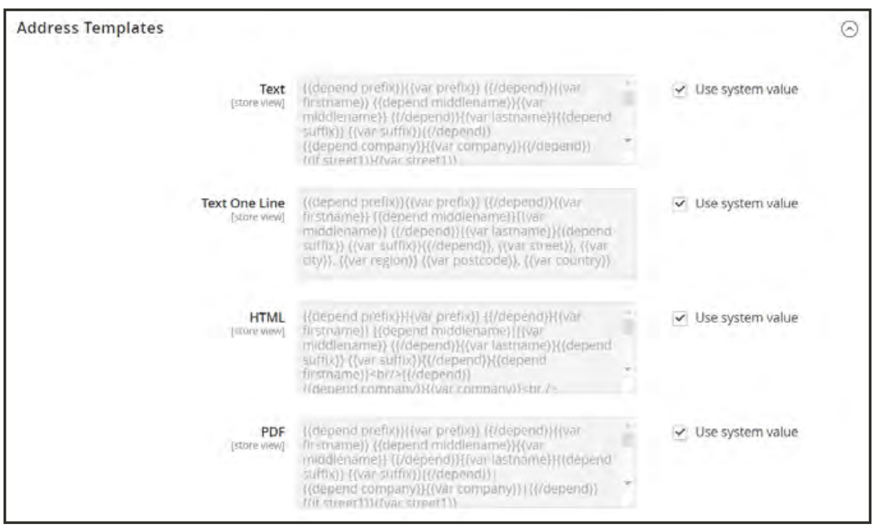
For Text, Text One Line, HTML and PDF Address Templates

```
{{depend address attribute code}} a space, a character, or UI label
{{/depend}};

{{if address attribute code}}{{var address attribute code}} a space, a
character, or UI label

{{/if}}
```

Example 2: JavaScript Template

For JavaScript Address Template

```
#{address attribute code} or User Interface label #{address attribute code}
```



Address Templates

To change the order of address fields:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand the **Address Templates** section. The section includes a separate set of formatting instructions for each of the following:
   - Text
   - Text One Line
   - HTML
   - PDF
4. Edit each template as needed, using the examples for reference.
5. When complete, tap **Save Config**.

CHAPTER 33:

Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Commerce gives you the ability to publish and distribute newsletters to customers who have subscribed, plus tools to produce your newsletter, build and manage your list of subscribers, develop content, and drive traffic to your store. You can also use Page Hierarchy to create an archive of past issues.

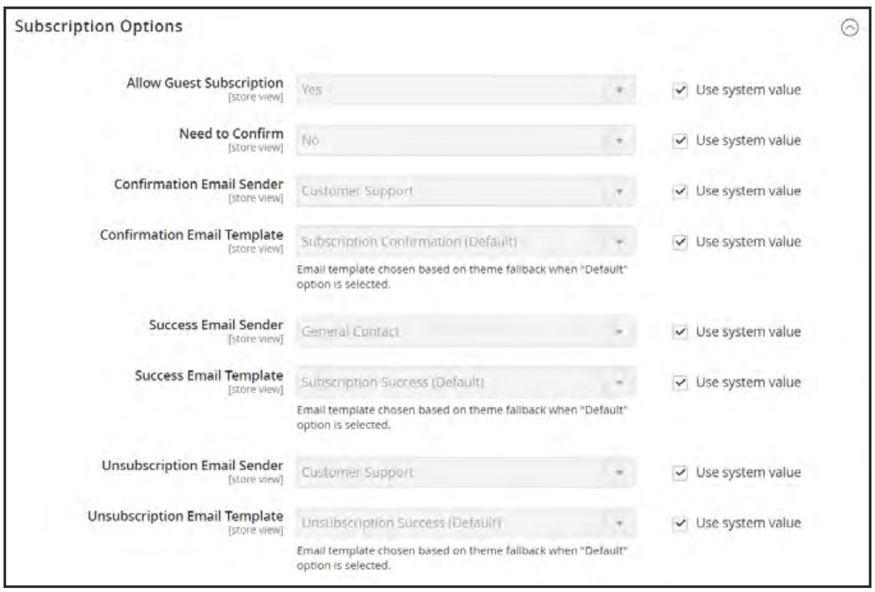
You can add capabilities by integrating your Magento installation with a third-party newsletter service provider and by adding extensions. To learn more, see Magento Connect.

Configuring Newsletters

The first step in creating newsletters is to configure the newsletter settings for your site. You can require customers to click a confirmation link that is sent by email to confirm the subscription. This double opt-in[1], method requires customers to confirm twice that they want to receive your newsletter, and reduces the possibility that it might be considered to be spam.

To configure subscription options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Newsletter**.
3. If necessary, expand the **Subscription Options** section. Then, do the following:



Subscription Options

[1]The process for subscribing email recipients by requiring them to take a secondary step to confirm that they want to receive emails.

a. Confirm the email template and sender of the each of the following email messages that are sent to subscribers:
   - Success email
   - Confirmation email
   - Unsubscribe email

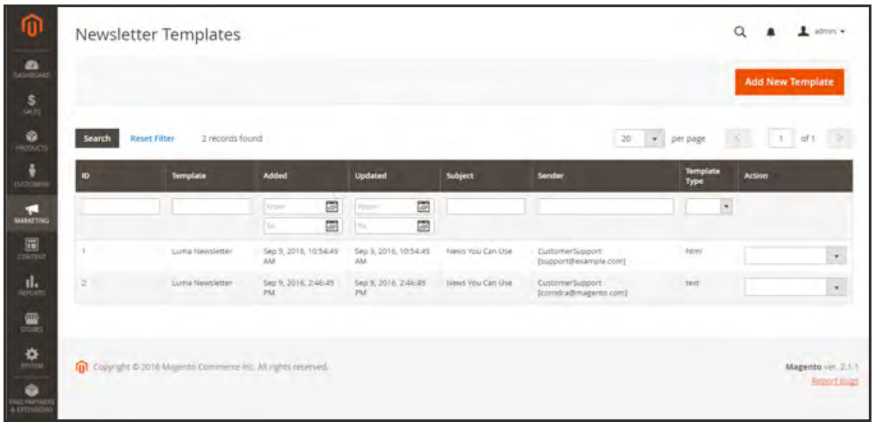
b. To use the double opt-in process to confirm subscriptions, set **Need to Confirm** to “Yes.”

c. To allow people who do not have an account with your store to subscribe to the newsletter, set **Allow Guest Subscription** to “Yes.”

4. When complete, tap **Save Config**.

Newsletter Templates

You can create as many newsletter templates as you need for different purposes. You might send a weekly product update, a monthly newsletter, or annual holiday newsletter. Newsletter templates can be prepared with HTML markup, or as plain text. Unlike HTML, plain text newsletters contain no images, rich text, or formatted links. In the grid, the Template Type column indicates whether a template is HTML or text.



Newsletter Templates

To create a newsletter template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Template**.

2. To add a new template, click the **Add New Template** button. Then, do the following:

   a. In the **Template Name** enter name for internal reference.

   b. In the **Template Subject** field, describe the purpose of the newsletter.

   c. In the **Sender Name** field , enter the name of the person who is to appear as the sender of the newsletter.

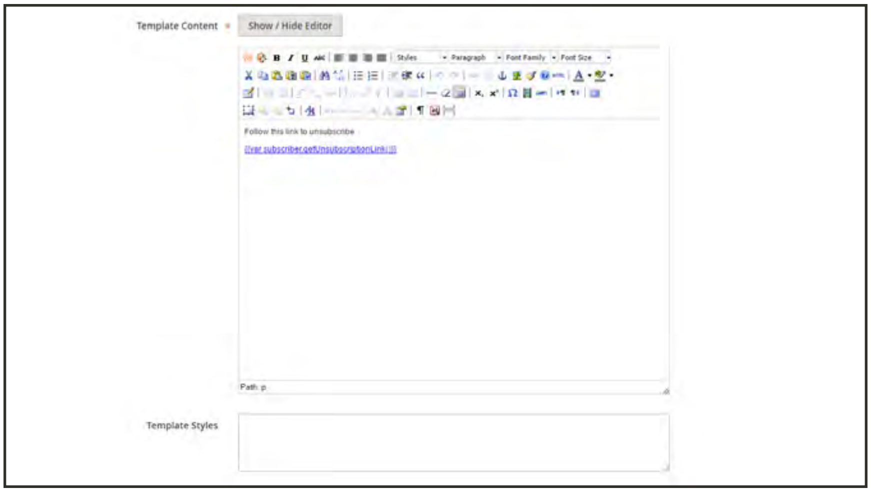
   d. In the **Sender Email** field, enter the email address of the newsletter sender.

Template Information

e. At the **Template Content** field, tap **Show / HIde Editor** to display the WYSIWYG editor. Then, update the content as needed. To learn more, see: Using the Editor.

> Do not remove the unsubscribe link at the bottom of the template content. In some jurisdictions, the link is required by law.

f. In the **Template Styles** field, enter the CSS declarations needed to format the content.



Template Information

3. Tap **Preview Template** to see how it looks. Then, make any changes that are needed.

4. When complete, tap **Save Template**.

   After you save a template, a **Save As** button appears the next time you edit the template. It can be used to save variations of the template without overwriting the original.

To convert the template to plain text:

1. At the top of the page, tap **Convert to Plain Text**. When prompted to confirm, tap **OK**.

2. To preview the plain text version of the template, tap **Preview Template**. The preview opens in a new browser tab.

3. To save the plain text version, tap **Save Template**.

To restore the HTML:

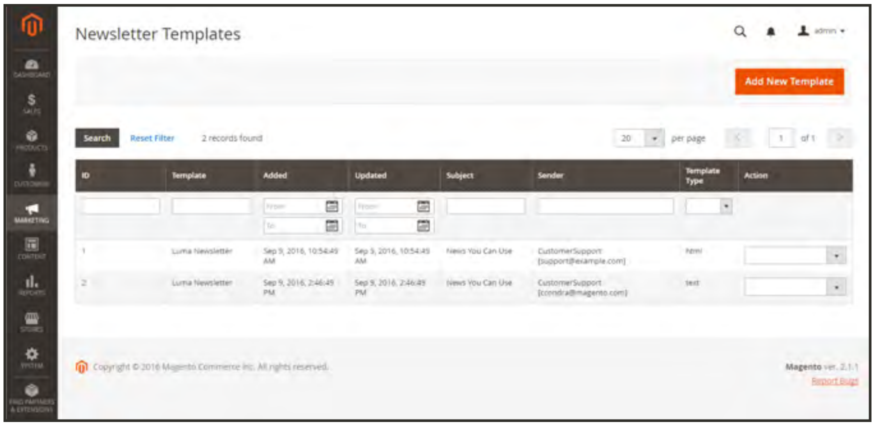
1. At the top of the page, tap **Return HTML Version**.

2. To preview the HTML version of the template, tap **Preview Template**. The preview opens in a new browser tab.

3. To save the HTML version, tap **Save Template**.

Sending Newsletters

To manage the load on the server, newsletters with many subscribers are sent in a queue of multiple batches. You can check the newsletter queue periodically to check the status, and see how many have been processed. Any problems that occur during transmission appear on the Newsletter Problem Report.

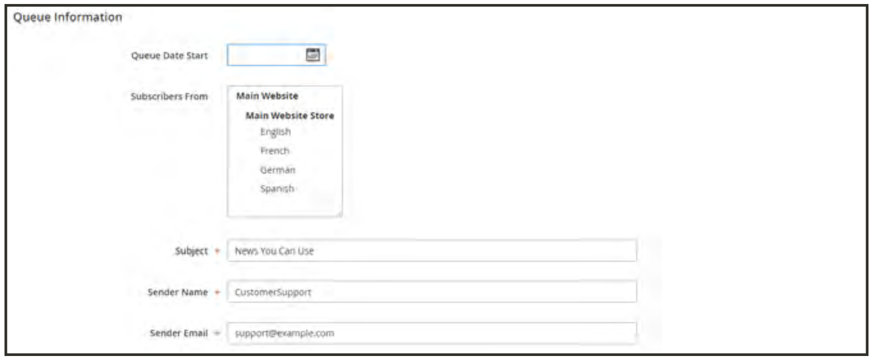


Add to Newsletter Queue

To send a newsletter:

1. On the Admin menu, tap **Marketing**. Then under **Newsletters**, choose **Newsletter Templates**.
2. In the grid, find the template for the newsletter that is to be sent. Then, set the **Action** column to “Queue Newsletter.”
3. In the **Queue Date Start** field, select the date that the transmission is to begin from the calendar ( ).
4. In the **Subscribers From** list select each store view that is to be included in the email blast.
5. Complete the email header information as follows:
   a. Enter a brief description of the newsletter for the **Subject** line of the email header.
   b. Enter the **Sender Name**.
   c. In the **Sender Email** field, enter the email address of the sender.

   The default name and email address of the sender is specified in the configuration.

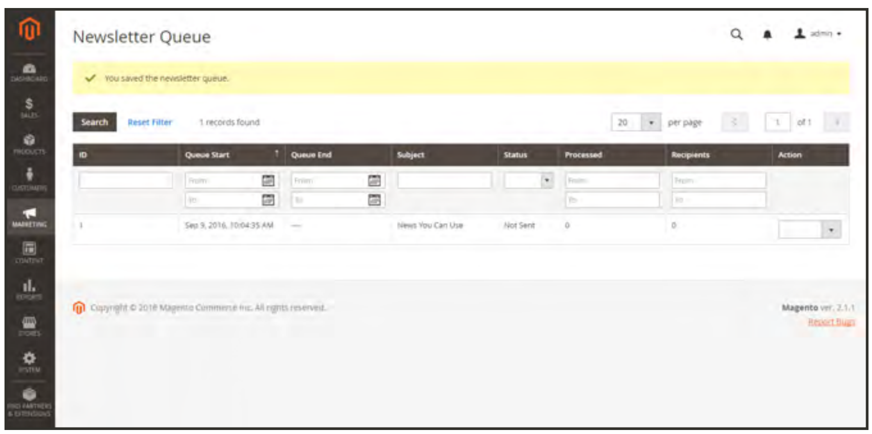


Queue Information

6. If applicable, enter a note in the **Message** box above the instructions to unsubscribe. Do not remove the instructions, which are required by law in many jurisdictions.

7. When complete, tap **Save and Resume**.

   The newsletter appears in the queue waiting to be processed.



Newsletter Queue

To check for problems:

1. On the Admin menu, tap **Reports**.

2. Under **Marketing**, choose **Newsletter Problem Reports**.

Managing Subscribers

As a best practice you should manage your subscription list on a regular basis, and make sure to process any requests to unsubscribe. In some jurisdictions, it is required by law that requests to unsubscribe are processed within a specific period of time.

If you want to use a third-party service to send newsletters, you can export your subscription list as a CSV or XML file.

To cancel a subscription:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Subscribers**.
2. Find the subscriber in the grid. Then, mark the checkbox in the first column.
3. Set the **Action** control to “Unsubscribe.” Then, tap **Submit**.

   The status of the record changes to “Unsubscribed.”

Unsubscribe

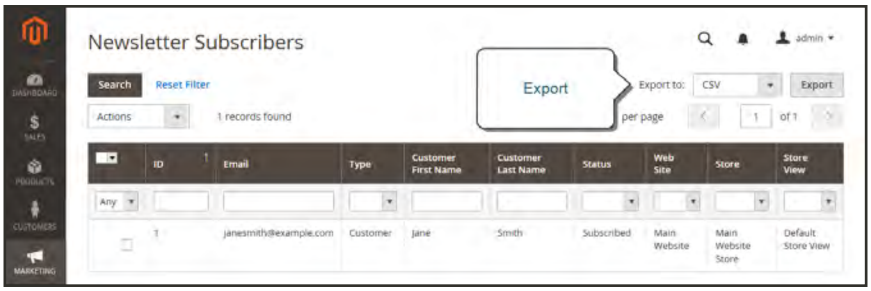
To export the list of subscribers:

1. From the Newsletter Subscribers list, use the filter controls to include only records with a **Status** of "Subscribed," and for the appropriate website, store, or store view.

2. Set the **Export to** control to one of the following:

   - CSV
   - XML

3. Tap **Export**. Then, look for the prompt at the bottom of the screen, and save the file.



Export Newsletter Subscribers

CHAPTER 34:

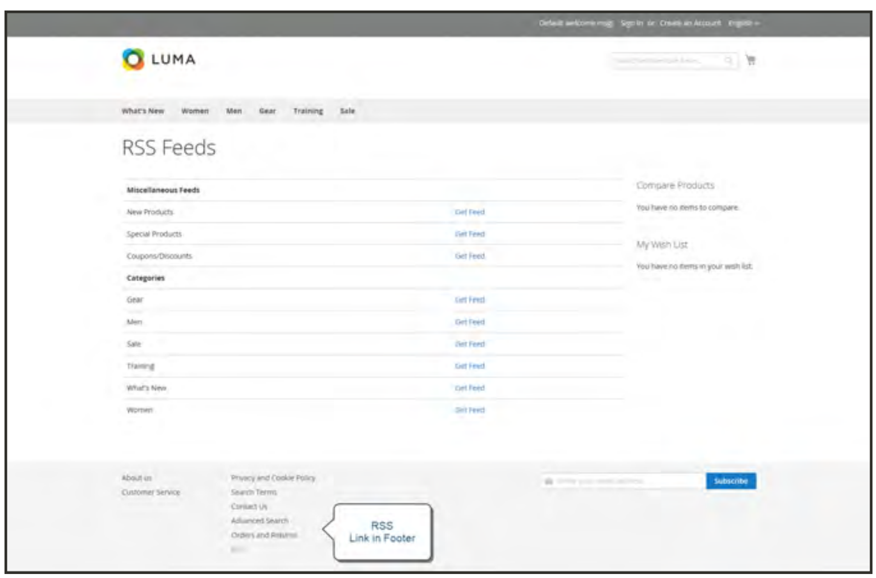
RSS Feeds

RSS (Really Simple Syndication) is an XML-based data format that is used to distribute information online. Your customers can subscribe to your RSS feeds to learn of new products and promotions. RSS Feeds can also be used to publish your product information to shopping aggregation sites, and can be included in newsletters.

When RSS feeds are enabled, any additions to products, specials, categories, and coupons are automatically sent to the subscribers of each feed. A link to all RSS feeds that you publish is in the footer of your store.

The orange RSS symbol is typically used to identify an RSS feed.

The software that is required to read an RSS feed is called a feed reader[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.



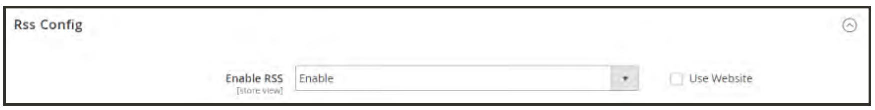
RSS Feeds

[1] Software that is used to read syndicated content from RSS feeds.

To set up RSS feeds for your store:

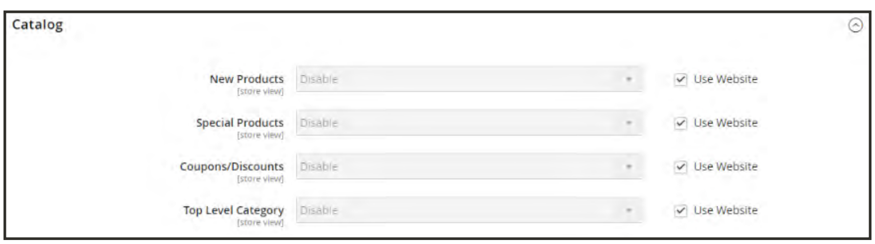
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the view(s) where the feeds are to be available. If prompted to confirm, tap **OK**.
3. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
4. Expand the **Rss Config** section. Then, set **Enable RSS** to “Enable.”

   If necessary, clear the **Use Website** checkbox to change the default value.



RSS Feeds

5. Expand the **Wish List** section. Then, set **Enable RSS** to “Enable.”
6. Expand the **Catalog** section and set other feeds to “Enable” as needed.
   - New Products
   - Special Products
   - Coupons/Discounts
   - Top Level Category



Catalog

7. Expand the **Order** section. Then, set **Customer Order Status Notification** to “Enable.”
8. When complete, tap **Save Config**.

Types of RSS Feeds

RSS FEED	DESCRIPTION
Wish List	When enabled, an RSS feed link appears at the top of customer wish list pages. Additionally, the wish list sharing page includes a checkbox that lets you include a link to the feed from shared wish lists.
New Products	Publishes notification of new products added to the catalog.
Special Products	Publishes notification of any products with special pricing.
Coupons / Discounts	Publishes notification of any special coupons or discounts that are available in the store.
Top Level Category	Publishes notification of any change to the top-level category structure of your catalog, which is reflected in the main menu.
Customer Order Status	Gives customers the ability to track their order status by RSS feed. When enabled, an RSS feed link appears on the order.

CHAPTER 35:

Using Variables

Variables are pieces of information that can be created once and used in multiple places, such as email templates, blocks, and content pages. Your store includes a large number of predefined variables that can be used to personalize communications. In addition, you can create your own custom variables.

- Predefined Variables
- Custom Variables

Adding Predefined Variables

Predefined variables are easy to add to content email templates and content pages to personalize communications. The selection of available variables depends on the template.

Variables for Contact Form Template

To add a variable to an email template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Do one of the following:
   - Load an existing template.
   - Add a new template.
3. In the **Template Content** box, position the insertion point where you want the variable to appear. Then, tap **Insert Variable**.
4. In the list of available variables, choose the one you want to insert into the template.
5. To preview the template in a new browser window, tap **Preview**. Then, return to the main window.
6. When complete, tap **Save Template**.

Adding Custom Variables

If you know a little basic HTML, you can create custom variables and use a markup tag to incorporate them into pages, blocks, banners, and email templates.

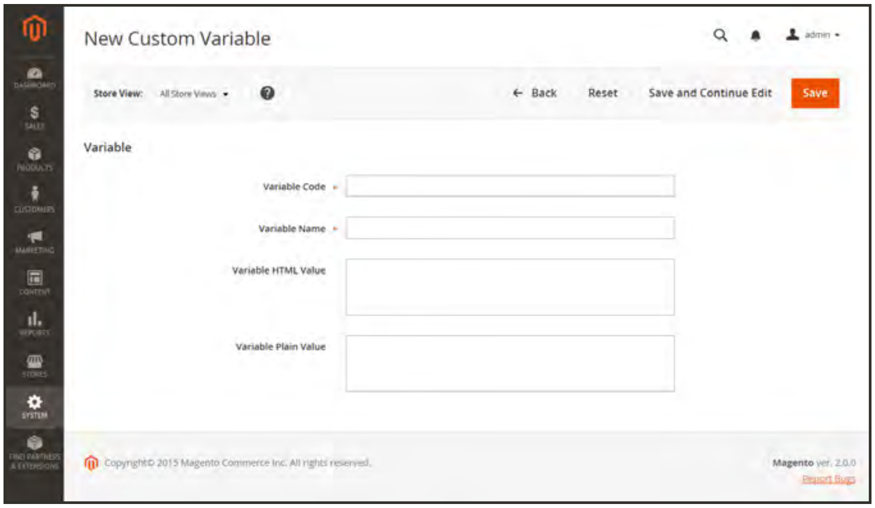
```
{{CustomVar code= "my_custom_variable"}}
```

Custom Variables

To create a custom variable:

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Custom Variables**.
2. Tap **Add New Variable**.
3. Enter an identifier in the **Variable Code** field. Use all lowercase characters, without spaces.
4. Enter a **Variable Name**, which is used for internal reference. Then, do one of the following:
   - In the **Variable HTML Value** text field, enter any content you want to include, using basic HTML tags. This option allows you to format the value.
   - In the **Variable Plain Value** field, enter the variable value as plain text.

> You can drag the lower-right corner to make the boxes bigger.



New Custom Variable

5. When complete, tap **Save**.

Markup Tags

A markup tag is a directive that contains snippet of code with a relative reference to an object in your store, such as a variable, URL, image, or block. Markup tags can be used anywhere the editor is available and incorporated into the HTML of content pages, blocks, email templates, newsletters, and so on.

Markup tags are enclosed in double, curly braces, and can either be generated by the Widget tool, or typed directly into HTML content. For example, rather than hard-coding the full path to a page, you can use a markup tag to represent the store URL. The markup tags featured in the following examples include:

Custom Variable

The Variable markup tag can be used to insert a custom variable into an email templates, blocks, newsletters, and content pages,

```
{{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 class="Magento\Contact\Block\ContactForm"
name="contactForm" template="Magento_Contact::form.phtml"}}
```

The code in the next example can be added to a page or block to display the a list of products in a specific category, by category ID.

"Category Product List" Template Tag

```
{{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>
```

Dynamic Media URLs

A dynamic media URL is a relative reference to an image or other media asset. When enabled, dynamic media URLs can be used to link directly to assets on your server, or to files stored on a content delivery network. The use of dynamic media URLs can impact catalog performance, and the editor can be configured to use either static or dynamic media URLs for catalog product and category descriptions.

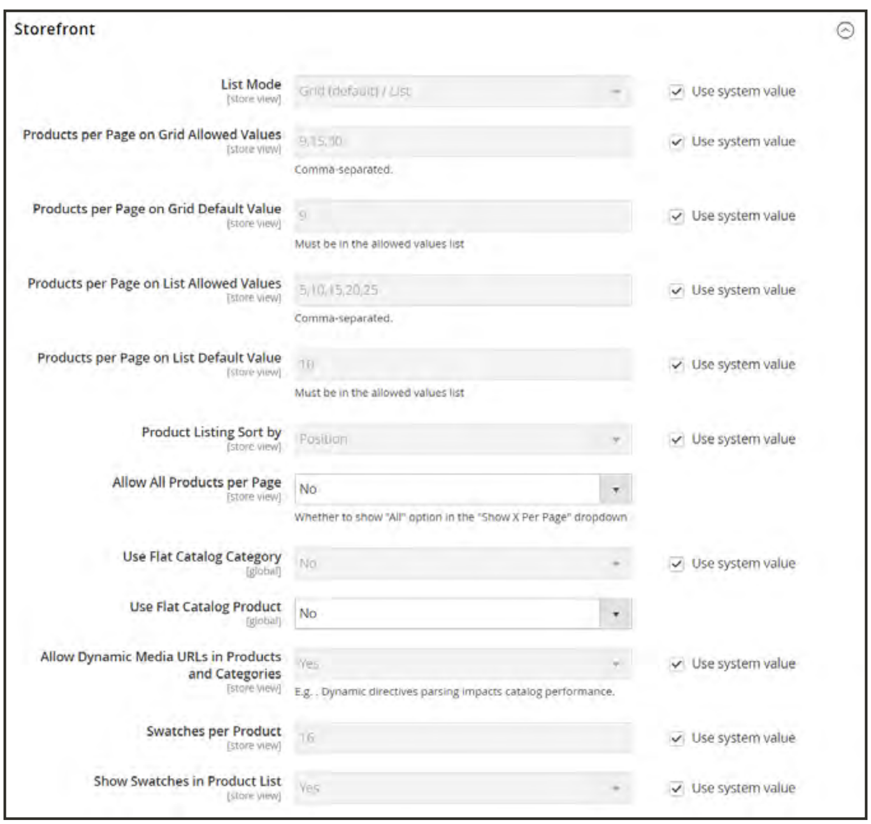
As with all markup tags, the code is enclosed in double curly braces. The format of a dynamic media URL looks like this:

```
{{media url="path/to/image.jpg"}}
```

To configure dynamic media URLs:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Catalog**, choose **Catalog**. Then, expand the **Storefront** section, and do the following:



Storefront

a. Scroll down to Allow Dynamic Media URLs in Products and Categories. Then, clear the **Use system value** checkbox.

b. Set **Allow Dynamic Media URLs in Products and Categories** to your preference.

3. When complete, tap **Save Config**.

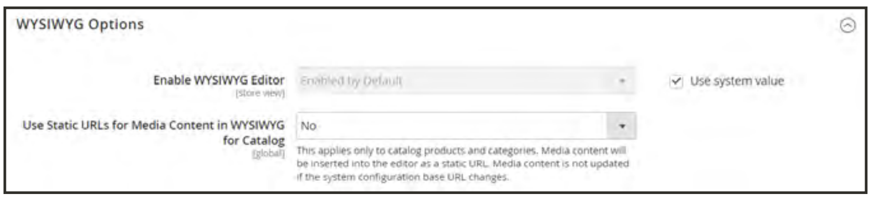
To use static URLs by default for media files:

By default, images inserted into the catalog from media storage have relative, dynamic URLs. If you prefer to use a static URL, you can change the configuration setting.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **General**, choose **Content Management**.

3. Expand the **WYSIWYG Options** section.



WYSIWYG Options

4. Set **Use Static URLs for Media Content in WYSIWYG for Catalog** to "Yes."

5. When complete,tap **Save Config**.

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"}}`
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"}}`

Store Contact Information Variables (cont.)

VARIABLE	MARKUP TAG
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()}}`

CHAPTER 36:

Social

Your Magento store can be connected to social networks either by using the Magento Social Facebook connector, or by installing a Marketplace extension. In addition, you can easily add social plugins such as the “Like” button to CMS blocks that can be incorporated into pages throughout your store.

- Connect to Facebook
- Marketplace Extensions
- Adding Social Plugins

Connect to Facebook

Magento Social is an integration that establishes a connection between your store and your Facebook account, and creates a shopping page with products from your catalog. When shoppers click a product on your Facebook page, they are redirected to the corresponding product page in your Magento store. All transactions take place from your Magento store.

Magento Social

The capacity and features that are available for your Facebook shopping page are determined by your Magento Social account. For a free account, only nine products are initially added to the page. To support an unlimited number of products, you must upgrade your Magento Social account.

Before You Begin

If your browser is set to disable popups, it must be updated to permit the popups that are used during the configuration of the Facebook connector. The following procedure shows how to add the URL that generates the necessary popups to the whitelist in Chrome. The process is similar for other browsers.

1. In the upper-right corner of the browser window, click the three dots to display the menu. Then, choose **Settings**.
2. Scroll down to the bottom of the page, and click **Advanced**.
3. In the **Privacy and security** section, expand **Content Settings**. Then, expand the **Popups** section, and do the following:
   a. Under **Allow**, tap **ADD**.
   b. Enter the URL for your store, and click **ADD**.
   c. Enter the following URL, and click **ADD**.

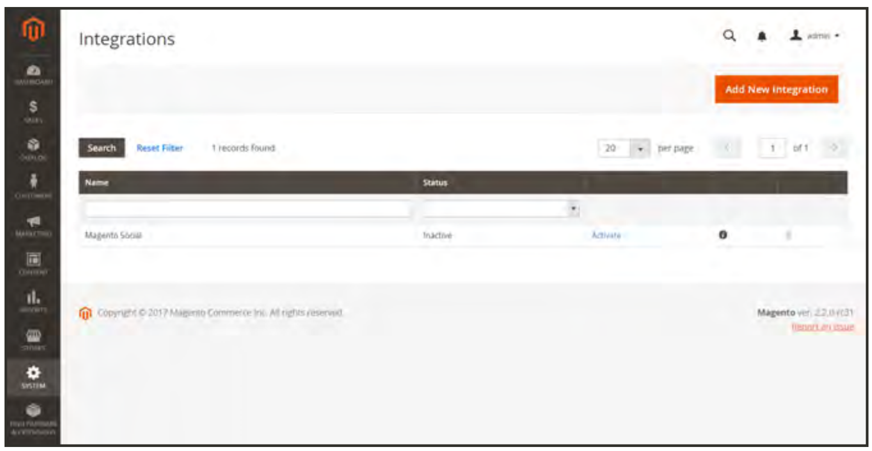
```
https://fbapp.ezsocialshop.com
```

Step 1: Activate Magento Social

1. On the Admin sidebar, tap **Marketing**. Then under **Social**, choose **Connect to Facebook**.
2. Under **Step 1**, tap **Integrations page** to establish your Magento Social connection.

Step 1: Activate Magento Social

3. Find **Magento Social** in the Integrations grid, and click **Activate**.

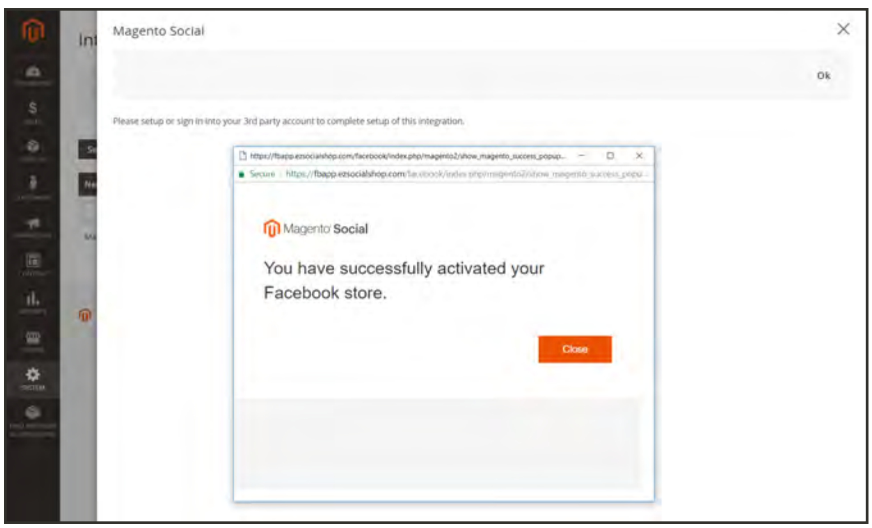


Activate Magento Social

4. When prompted to approve access to the following API resources, tap **Allow**.

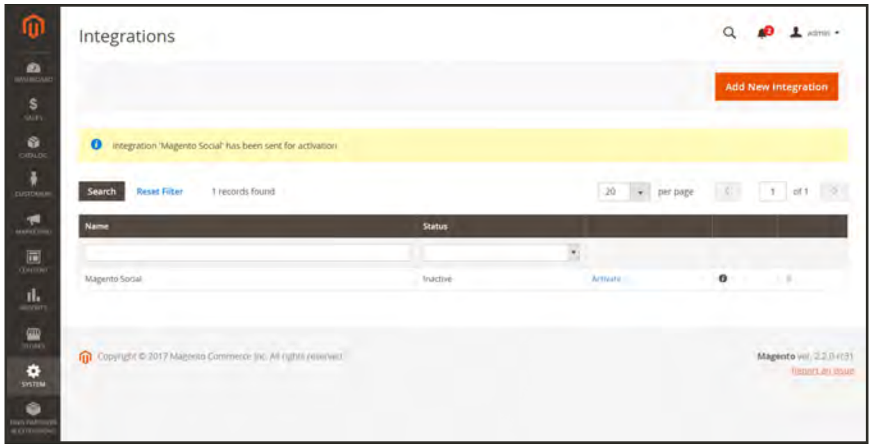
API Resources

5. When the "Success" message appears, tap **Close**.



Activation Successful

6. When you return to the Integrations grid, the status of Magento Social is "Active." If necessary in the future, you can repeat these steps to **Reauthorize** the integration.



Sent for Activation

Step 2: Launch Your Store

1. Keeping your Magento window open, open a new browser tab, and sign in to your **Facebook** account. Then, return to the **Magento** tab.

2. On the Admin sidebar, tap **Marketing**. Then again under **Social**, choose **Connect to Facebook**.

3. On the "Connect your store to Facebook" page under **Step 2**, tap **Launch Store**.

Step 2: Launch Your Store

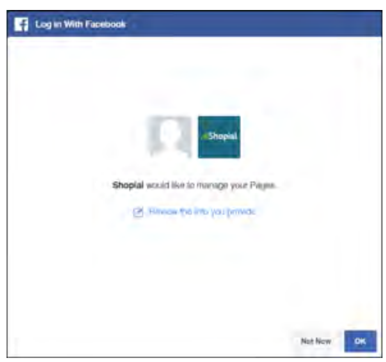
4. When prompted to "Turn your Magento store into a Facebook store," tap **Connect Magento to Facebook**.

Connect Your Store to Facebook

5. At the **Log In with Facebook** window, tap **Continue as [username]**.

Log In with Facebook

6. Tap **OK** to let Shopial manage your pages.

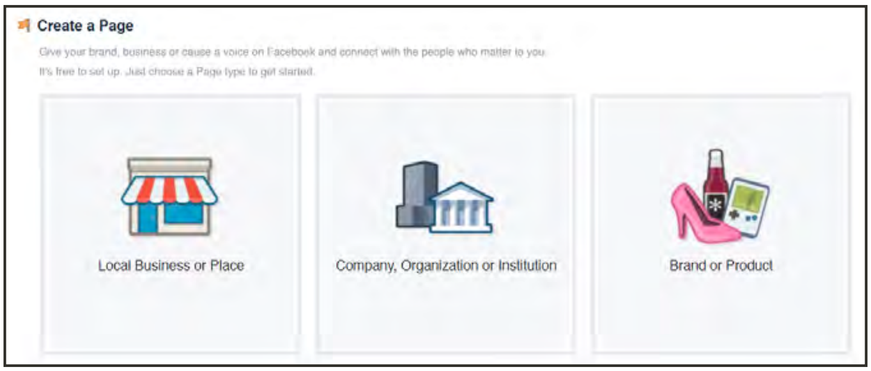


Let Shopial Manage Pages

7. At the “Head to Facebook” page,” tap **Create a Facebook page**. Then, do the following:

Create a Facebook Page

a. Under **Create a Page**, tap **Brand or Product**.



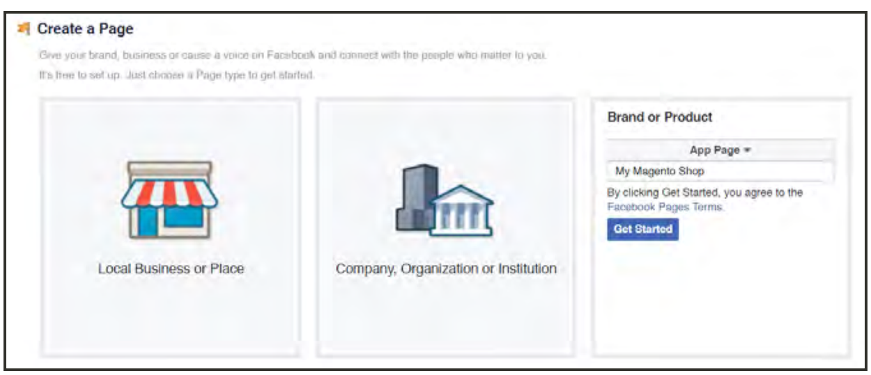
Refresh

b. Under **Choose a Category**, select "App page".

> The categories listed are not integrated with your Magento Social page. At this time, Magento Social does not support choosing specific products from your catalog.

c. Enter a **Name** for your Magento Social page.

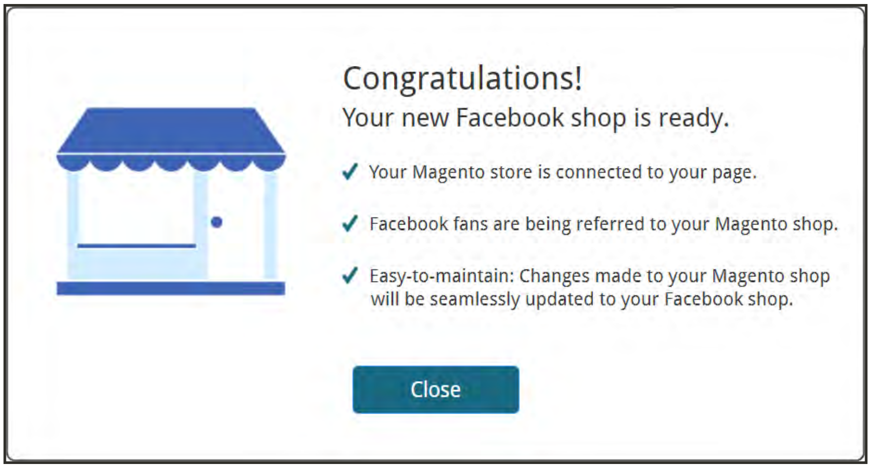
d. Tap **Get Started**.



Get Started

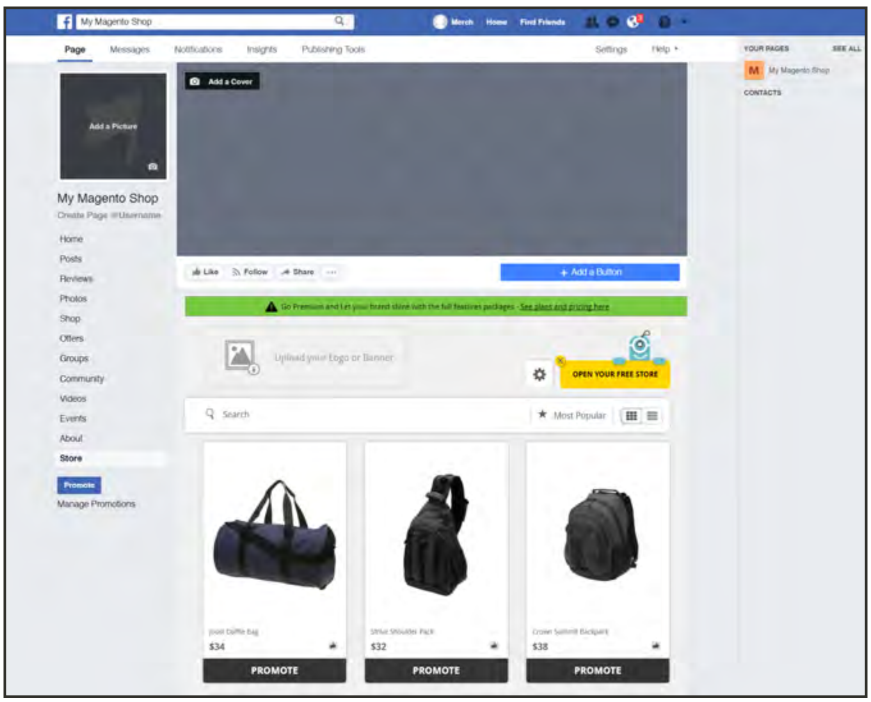
e. Return to the tab with the "Head to Facebook" page, and tap **Refresh**.

f. When the **Congratulations** message appears, tap **Close** to see your new Facebook shop.



Congratulations!

g. Your initial store has nine products from your Magento catalog. To finish the page, you can add a profile photo, cover image, and description.



Magento Store on Facebook

8. Whenever you want to return to your Magento store page from other pages in your Facebook account, do the following:

   a. In the panel on the left, click **See more** to display the full list of options.

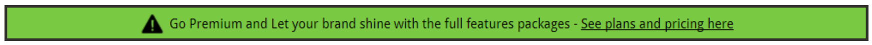
   b. Choose the last option, **Store**.

Step 3: Upgrade Your Magento Social Store

Your Magento Social account determines the number of products that can be added to a single Magento Social page. To create multiple pages, you must open a separate Magento Social account for each page.

1. If necessary, Sign in to your **Facebook** account. In the panel on the left, click **See more**. Then, choose **Store**.

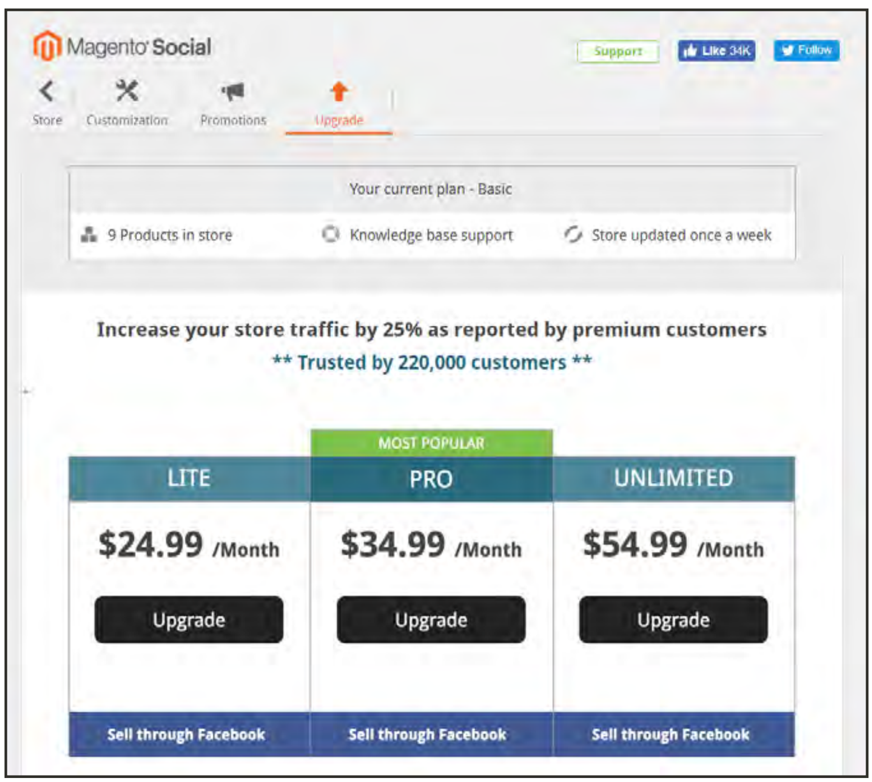
2. In the green message, click **See plans and pricing here**.



See Plans and Pricing

3. On the **Upgrade** tab of the Magento Social section, choose one of the following account types. Then, tap **Upgrade**.

   - Lite
   - Pro
   - Unlimited



Upgrade Levels

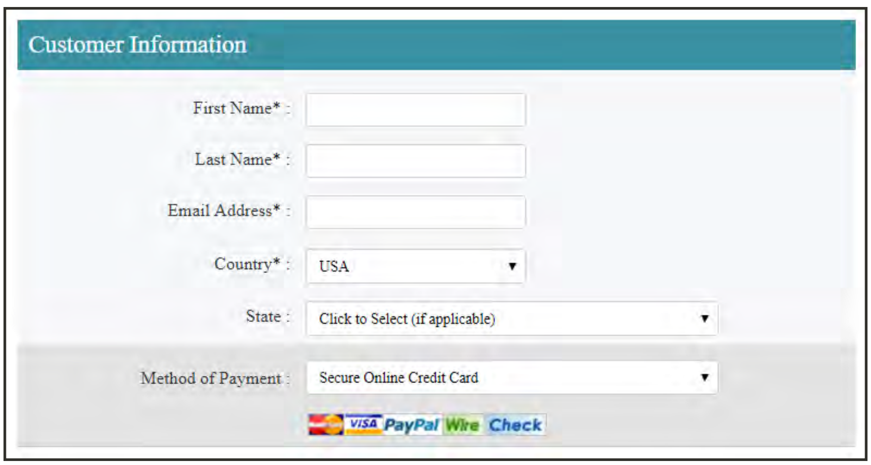
4. In the **Order Information** section, do the following:

a. If you have a coupon, enter the **Coupon Code**.

b. Tap **Recalculate**.

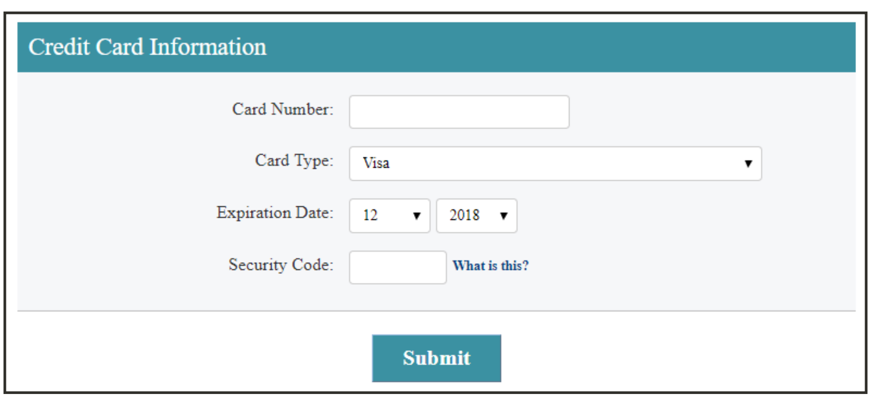
Order Information

5. Complete the **Customer Information**.



Customer Information

6. Complete the **Credit Card Information**. Then, review the information and tap **Submit**.



Credit Card Information

Reauthorizing Magento Social

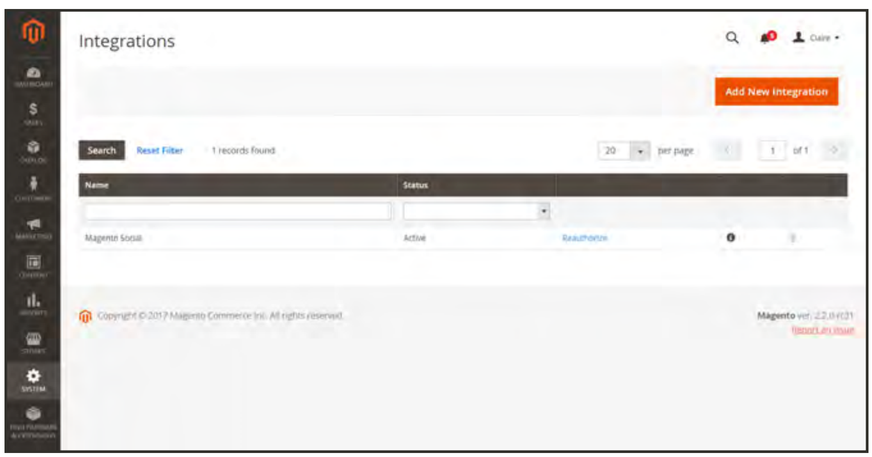
If you need to repeat the process after setting up your store for the first time, do the following:

1. On the Admin sidebar, tap **Marketing**. Then under **Social**, choose **Connect to Facebook**.

2. Under **Step 1**, tap **Integrations page** to establish your Magento Social connection.

Step 1: Activate Magento Social

3. Find Magento Social in the Integrations grid, and tap **Reauthorize**.



Reauthorize

4. When prompted to approve access to the following API resources, tap **Reauthorize**.

Troubleshooting

1. If the "Unable to Connect" page appears, complete the following instructions to refresh your request and activate your token.

   a. On the Admin sidebar, choose **System**. Then under **Extensions**, choose **Integrations**.

   b. Find **Magento Social** in the list, and click either **Activate**. or **Reauthorize**.

c. Return to the "Unable to connect" page, and tap **Refresh**.

Unable to Connect

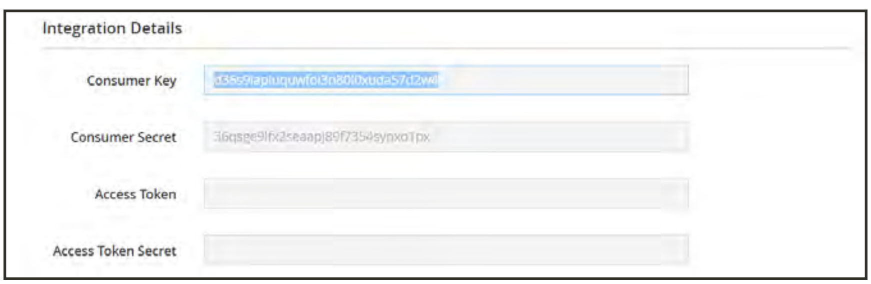
2. If your store is still not connected, complete the following instructions to manually insert your consumer key.

a. Find **Magento Social** in the Integrations grid, and click the Information ( ) icon to display the Integration Info.

b. Under **Current User Identity Verification**, enter **Your Password** that is used to log in to the Admin.

c. Under **Integration Details**, select the entire value of the **Consumer Key** field, and copy it to the clipboard.

To copy the selected key, either right-click and choose **Copy** from the context menu, or press **Ctrl**+**C**.



Copy Consumer Key

d. Return to the "Unable to connect" page, and paste the **Consumer Key** value into the text box. Then, tap **Send**.

Send Consumer Key

3. You should now be able to continue with Step 2: Launch Your Store.

SEO & Search

Contents

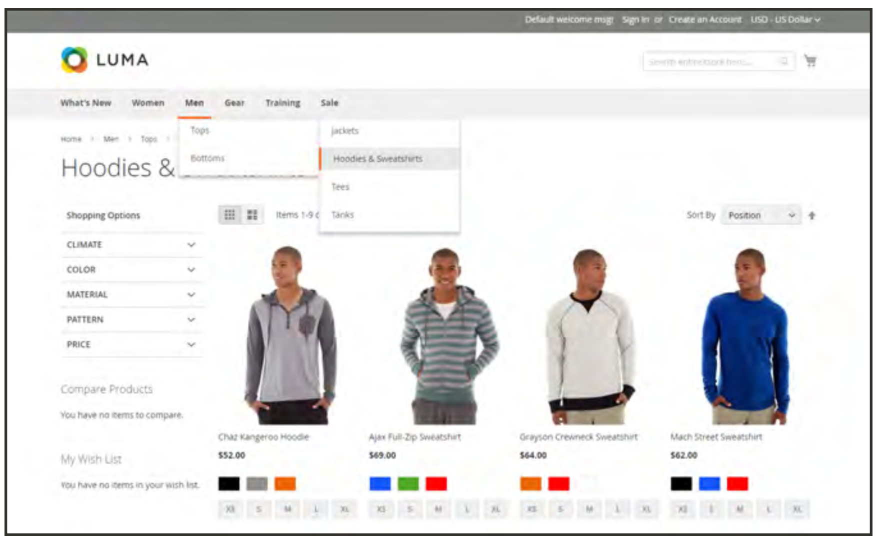
In this section of the guide, we'll take a look at the search capabilities of your store, what you can learn from customer search terms, and how to make your products easy to find. Finally, you'll learn best practices and techniques that you can use to bring more traffic to your store.

CHAPTER 37:

Catalog Navigation

The term navigation[1] refers to the methods shoppers use to move from page to page throughout your store. The main menu, or top navigation of your store is actually a list of category links, and provides easy access to the products in your catalog. You will also find categories in the breadcrumb trail that runs across the top of most pages, and in the layered navigation that appears on the left side of some two- or three-column pages. To learn more about category display options, see: Display Settings.

For a product to be visible in your store, it must be assigned to at least one category. Each category can have a dedicated landing page with an image, static block, a description, and a list of products in the category. You can also create special designs for category pages that are active only for a specific period of time such as for a holiday or promotion.

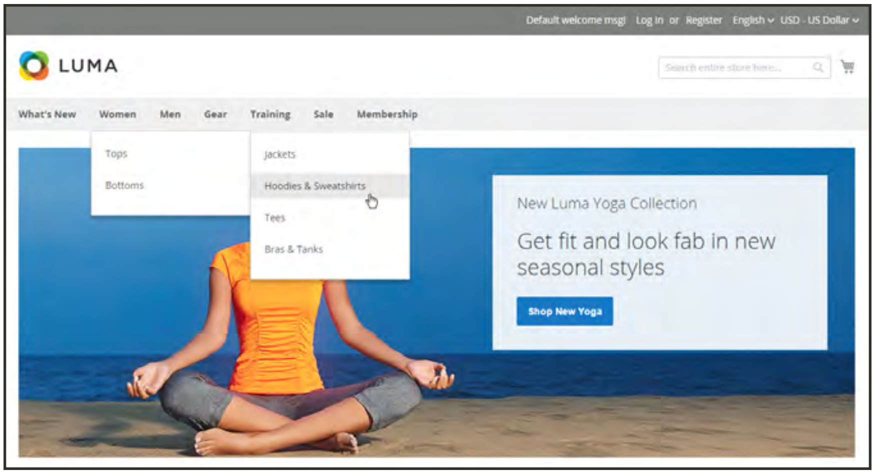


Catalog Navigation

[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 more deeply nested a category, the less likely it is to be thoroughly indexed. As a general rule, anywhere between one and three visible levels is considered to be the most effective. The root category counts as the first level, although it doesn't appear in the menu. The maximum number of levels that are available in the top navigation is determined by the configuration. In addition, there might be a limit to the number of menu levels that are supported by your store theme. For example, the sample Luma theme supports up to five levels, including the root.

Counting Menu Levels

Level 1	The first level is the root category, which in the sample data is named “Default Category.” The root is a container for the menu, and its name does not appear as an option in the menu.
Level 2	On a desktop display, the top navigation is the main menu that appears across the top of the page. On a mobile device, the main menu typically appears as a fly-out menu of options. The second-level options in the Luma store are “What's New,” “Women,” “Men,” “Gear,” “Training,” and “Sale.”
Level 3	The third-level appears below each main menu option. For example, under “Women,” the third-level options are “Tops” and “Bottoms.”
Level 4	The fourth-level options are subcategories that fly out from a third-level option. For example, under “Tops,” the fourth level menu options are “Jackets,” “Hoodies & Sweatshirts,” “Tees,” and “Bras & Tanks.”

To set the top navigation:

See “Creating Categories” to define the category structure of the main menu. For a multistore installation, a different main menu can be assigned as the root category for each store.

To set the depth of the top navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, expand **Catalog**. Then, choose **Catalog**.
3. Expand the **Category Top Navigation** section.

   Because the depth of the top navigation has a global configuration scope, the setting applies to all websites, stores, and store views in the Magento installation. The Category Top Navigation configuration section is available only when Store View in the upper-left corner is set to “Default Config.”

Default Config

4. To limit the number of subcategories that appear in the top navigation, enter the number in the **Maximal Depth** field.

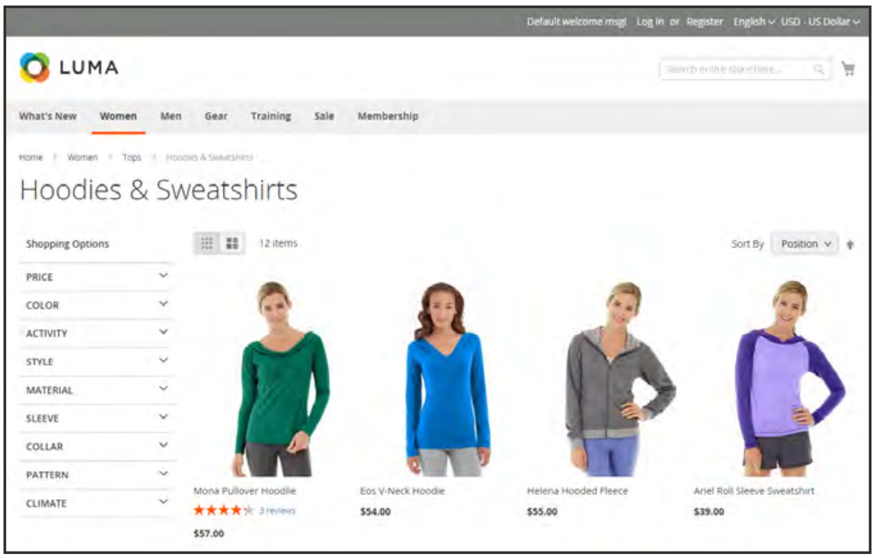
   The default Maximal Depth value is zero, which does not place a limit on the number of subcategory levels.
5. When complete, tap **Save Config**.

Category Top Navigation

Breadcrumb Trail

A breadcrumb trail is a set of links that shows where you are in relation to other pages in the store. You can click any link in the breadcrumb trail to return to the previous page.

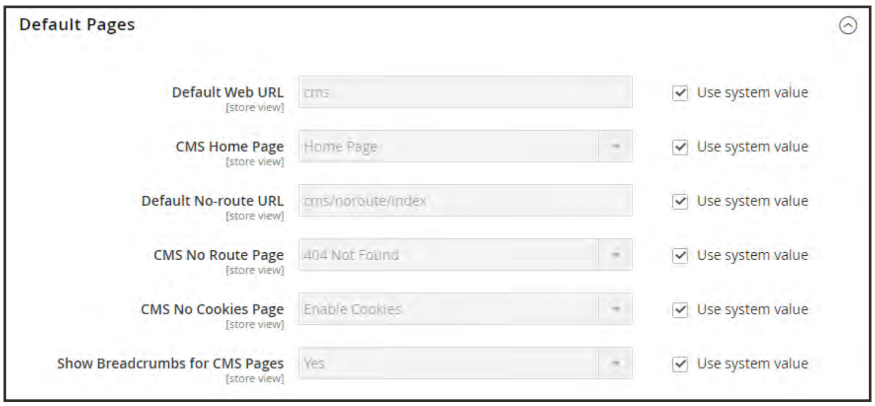
The breadcrumb trail can be configured to appear on content pages, as well as catalog pages. The format and position of the breadcrumb trail varies by theme, but it is usually located just below the header. By default, the breadcrumb trail appears on CMS pages.



Breadcrumb Trail

To remove the breadcrumbs from CMS pages:

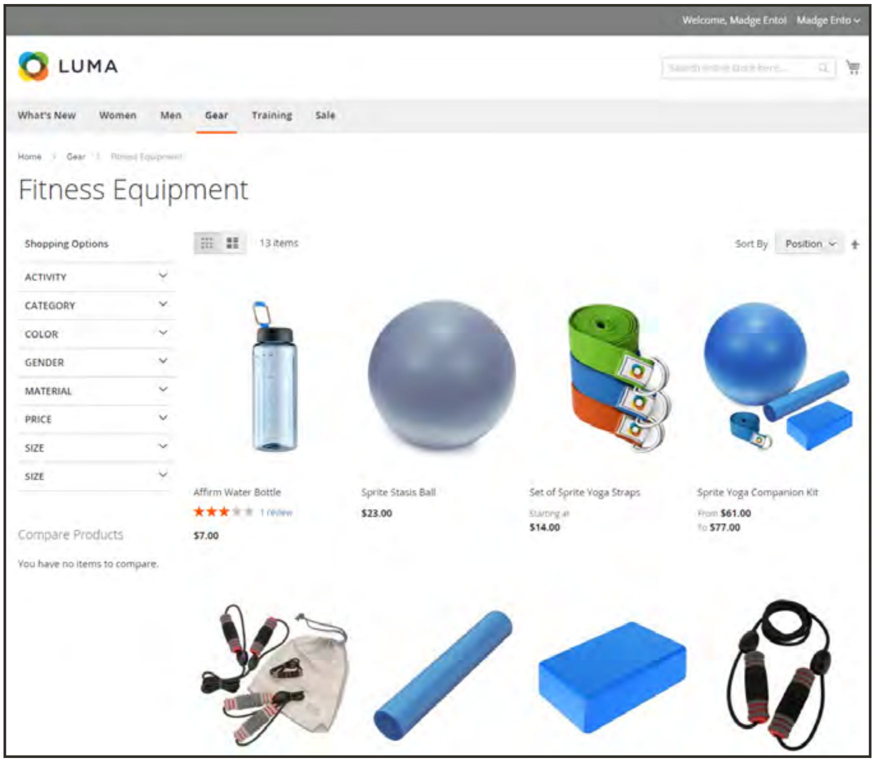
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**. Then, do the following:
   a. Expand the **Default Pages** section.
   b. Clear the **Use system value** checkbox.
   c. Set **Show Breadcrumbs for CMS Pages** to "No."
3. When complete, tap **Save Config**.



Show Breadcrumbs for CMS Pages

Product Listings

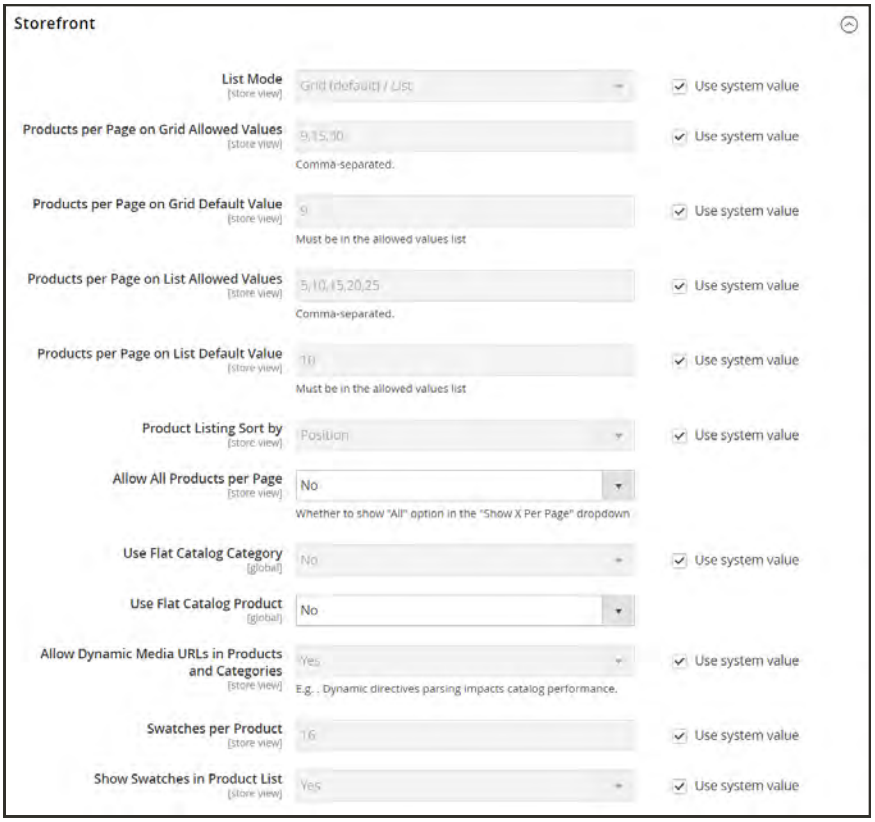
Product listings can be set to appear by default as either a list or grid. You can also determine how many products appear per page, and which attribute is used to sort the list. Each catalog page with a product list has a set of controls that can be used to sort the products, change the format of the 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."

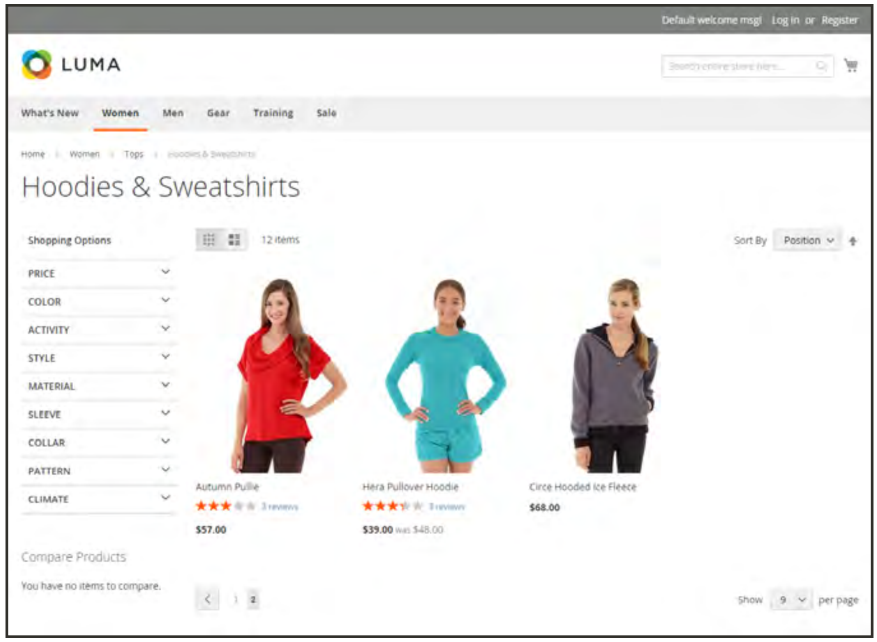
6. When complete, tap **Save Config**.

Page Controls

CONTROL	DESCRIPTION
View As	Displays the products in either a grid or list format.
Sort By	Changes the sort order of the list.
Show Per Page	Determines how many products appear per page.
Pagination Links	Navigation links to other pages.

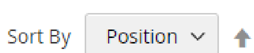
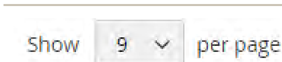
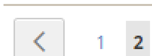
Pagination Controls

The Pagination settings appear at the top and bottom of the list, and control the format of the pagination links for product listings. You can set the number of links that appear in the control, and configure the Next and Previous links. For the pagination links to appear, there must be more products in the list than are allowed per page in the product list configuration.



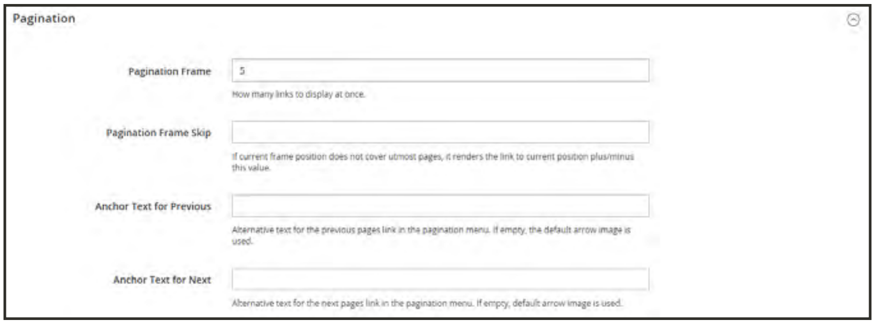
Pagination Controls

Pagination Controls

	**View As** Displays the list in either a Grid or List format.
	**Sort By** Changes the sort order of the list. The "Used for Sorting in Product Listing" storefront property determines which product attributes can be used to sort the list.
	**Show Per Page** Determines how many products appear per page.
	**Pagination Links** Navigation links to other pages.

To configure the pagination controls:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand the **Pagination** section.



Pagination

   a. In the **Pagination Frame** field, enter the number of links that you want to appear in the pagination control.

   b. In the **Pagination Frame Skip** field, enter the number of links that you want to skip ahead before displaying the next set of links in the pagination control.

   For example, if the pagination frame has five links, and you want to jump to the next five links, how many links do you want to skip ahead? If you set this to four, then the last link from the previous set will be the first link in the next set.

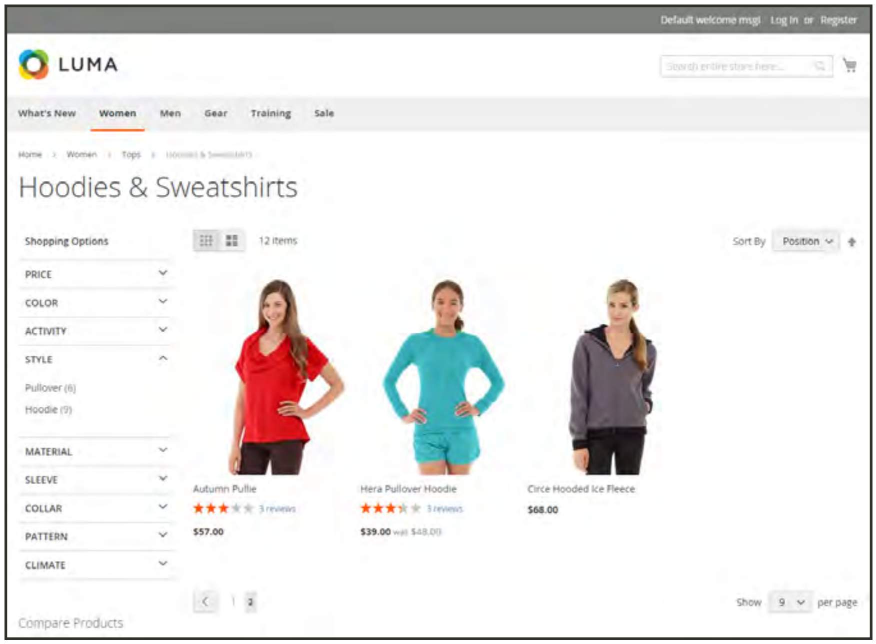
   c. In the **Anchor Text for Previous** field, enter the text that you want to appear for the Previous link. Leave blank to use the default arrow.

   d. In the **Anchor Text for Next** field, enter the text that you want to appear for the Next link. Leave blank to use the default arrow.

4. When complete, tap **Save Config**.

Layered Navigation

Layered navigation makes it easy to find products based on category, price range, or any other available attribute. Layered navigation usually appears in the left column of search results and category pages and sometimes on the home page. The standard navigation includes a “Shop By” list of categories and price range. You can configure the display of layered navigation, including product count and price range.

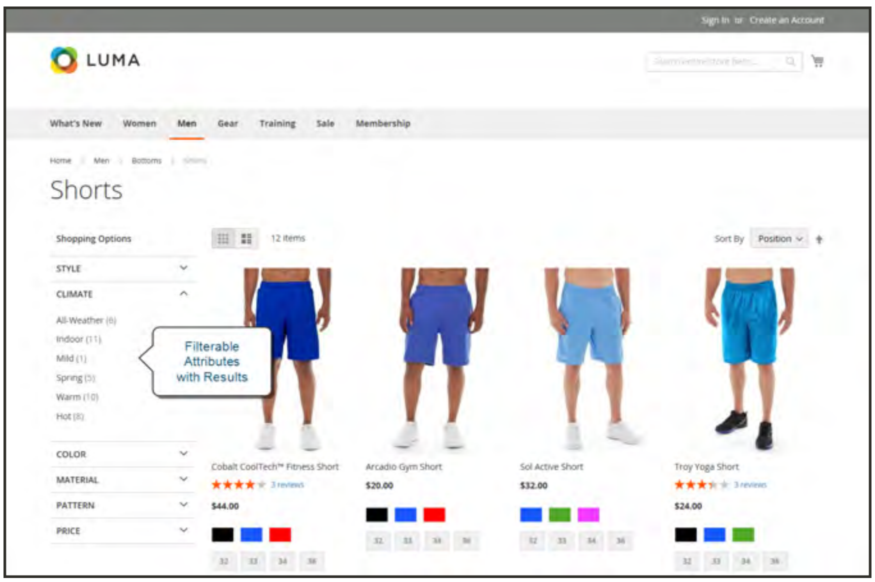


Layered Navigation by Category and Price

Filterable Attributes

Layered navigation can be used to search for products by category or by attribute. For example, when a shopper chooses the Mens/Shorts category from the top navigation, the initial results include all products in the category. The list can be filtered further by choosing a specific style, climate, color, material, pattern, or price—or a combination of values. Filterable attributes appear in an expanding section that lists each attribute value. As an option, the list of products with matching results can be configured to include products with, or without, a match.

The attribute properties, combined with the product input type determines which attributes can be used for layered navigation. Layered navigation is available only for “anchor” categories, but can also be added to search results pages. The Catalog Input Type for Store Owner property of each attribute must be set to “Dropdown,” “Multiple Select,” or “Price.” To make the attributes filterable, the Use in Layered Navigation property of each must be set to either “Filterable (with results)” or “Filterable (no results).”



Filterable Attributes In Layered Navigation

The following instructions show how to set up basic layered navigation with filterable attributes. For advanced layered navigation with price steps, see: Price Navigation.

Process Overview:

Step 1: Set Up the Attribute Properties

Step 2: Make the Category an Anchor

Step 3: Test the Results

Step 1: Set Up the Attribute Properties

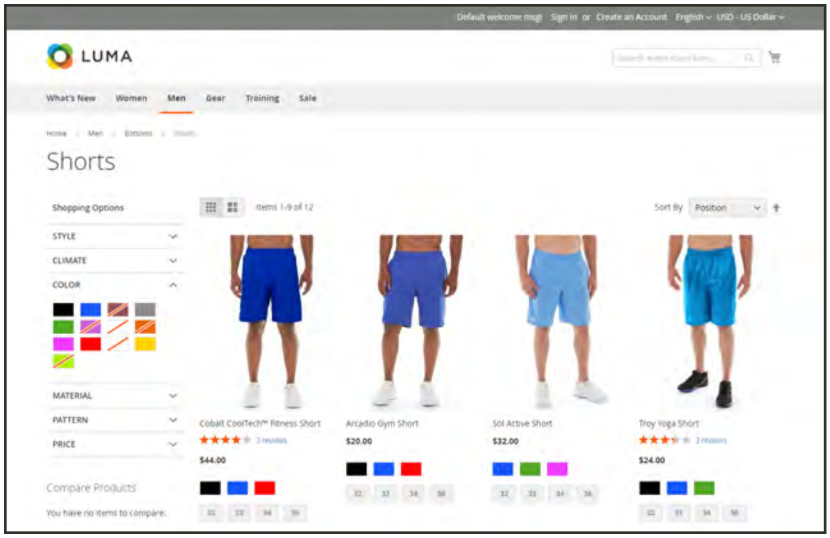
1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product.**

2. Find the attribute in the list, and open in edit mode. Then, do the following:

Filtered Search on Attribute Code

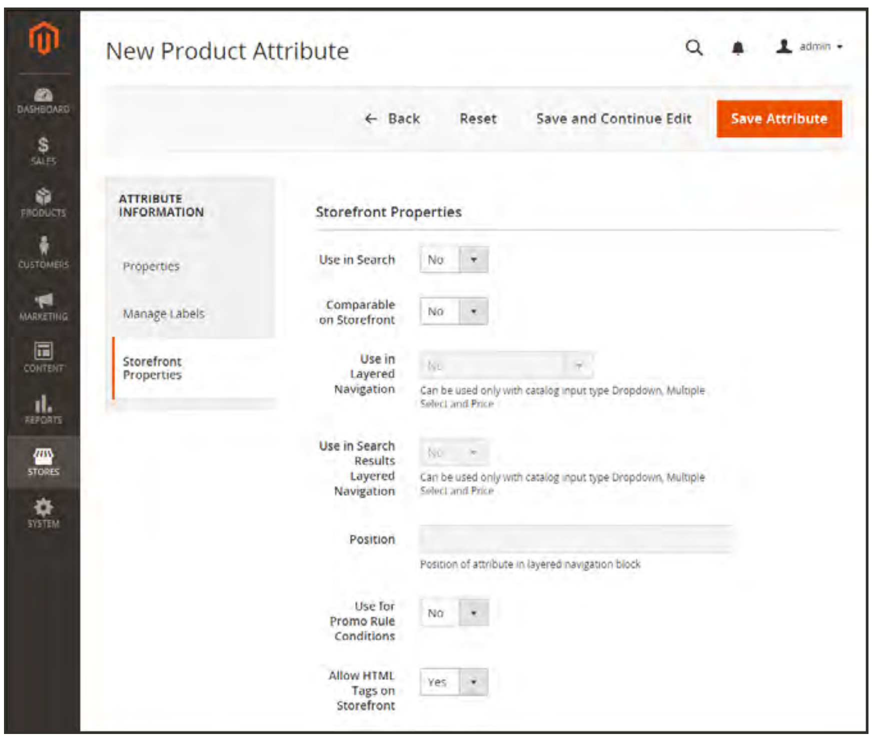
a. In the panel on the left, choose **Storefront Properties**. Then, set **Use In Layered Navigation** to one of the following:

Filterable (with results)	Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters. The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.
Filterable (no results)	Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.



Filterable Swatch Value with No Results

b. Set **Use In Search Results Layered Navigation** to "Yes."

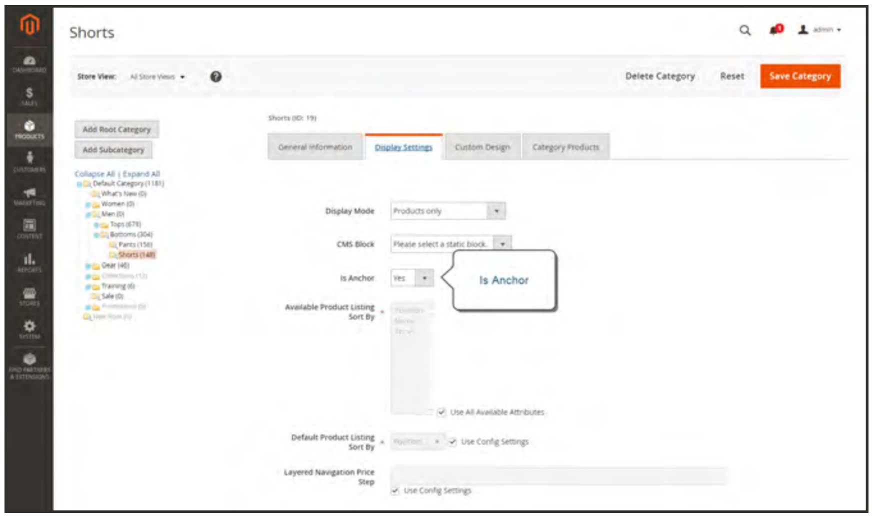


Storefront Properties

3. Repeat these steps for each attribute that you want to include in layered navigation.

Step 2: Make the Category an Anchor

1. On the Admin sidebar, tap **Products**. Then under **Inventory** choose **Categories**.
2. In the categories tree on the left, select the category where you want to use layered navigation.
3. Expand the **Display Settings** section. Then, set **Anchor**to "Yes."
4. Tap **Save**.



Category Display Settings

Step 3: Test the Results

To test the setting, go to your store and navigate to the category from the main menu. The selection of filterable attributes appears in the layered navigation of the category page.

Price Navigation

Price navigation can be used to distribute products by price range in layered navigation. You can also split each range in intervals. There are ways to calculate price navigation:

- Automatic (Equalize Price Ranges)
- Automatic (Equalize Product Counts)
- Manual

With the first two methods, the navigation steps are calculated automatically. The manual method lets you specify a division limit for price intervals. The following example shows the difference between price navigation steps of 10 and 100.

Iterative splitting provides the best distribution of products among price ranges. With iterative splitting, after choosing the $0.00-$99 range, the customer can drill-down through several sub-ranges of prices. Price-range splitting stops when the number of products reaches the threshold set by the Interval Division Limit.

Example: Price Navigation Steps

PRICE STEP BY 10	PRICE STEP BY 100
$20.00 - $29.99 (1)	$0.00 - $99.99 (4)
$30.00 - $39.99 (2)	$100 - $199.99 (5)
$70.00 - $79.99 (1)	$400.00 - $499.99 (2)
$100.00 - $109.99 (1)	$700.00 and above (1)
$120.00 - $129.99 (2)	
$150.00 - $159.99 (1)	
$180.00 - $189.99 (1)	
$420.00 - $429.99 (1)	
$440.00 - $449.99 (1)	
$710.00 and above (1)	

To configure price navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Layered Navigation** section. Then, do the following:
   a. By default, **Display Product Count** is set to "Yes." The change the setting, first clear the **Use system value** checkbox.
   b. Set **Price Navigation Steps Calculation** to one of the following methods:

Layered Navigation

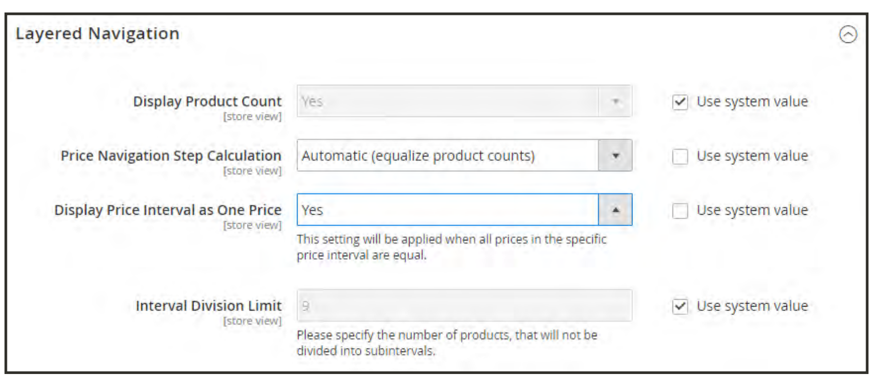
Method 1: Automatic (equalize price ranges)

Leave **Price Navigation Steps Calculation** set to the default, "Automatic (Equalize Price Ranges.)" This setting uses the standard algorithm for price navigation.

Method 2: Automatic (equalize product counts)

To change the value of any of the following fields, first clear the **Use system value** checkbox.

1. Set **Price Navigation Steps Calculation** to "Automatic (equalize product counts)."
2. To display a single price when multiple products with the same price, set **Display Price Interval as One Price** to "Yes."
3. In the **Interval Division Limit** field, enter the threshold for a number of products within a price range. The range cannot be further split beyond this limit., The default value is 9.

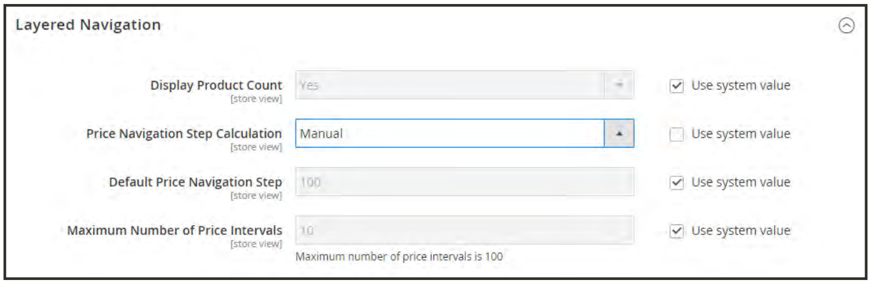


Automatic (equalize product counts)

Method 3: Manual

To change the value of any of the following fields, first clear the **Use system value** checkbox.

1. Set **Price Navigation Steps Calculation** to "Manual."
2. Enter a value to determine the **Default Price Navigation Step**.
3. Enter the **Maximum Number of Price Intervals** allowed, up to 100.



Manual

4. 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." If necessary, first clear the **Use system value** checkbox.

   b. Set **Price Navigation Step Calculation** to "Automatic (equalize price ranges)." If necessary, first clear the **Use system value** checkbox.

4. When complete, tap **Save Config**.

CHAPTER 38:

Catalog Search

Research shows that people who use search are more likely to make a purchase than those who rely on navigation alone. In fact, according to some studies, people who use search are nearly twice as likely to make a purchase. In this section of the guide, we will explore how customers search for products in your catalog, and how you can configure catalog search.

Quick Search

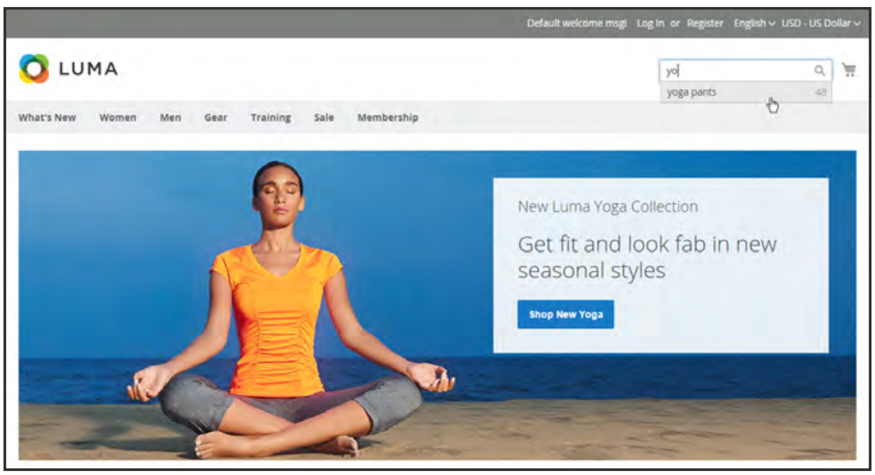
The Search box in the header of the store helps visitors find products in your catalog. The search text can be the full or partial product name, or any other word or phrase that describes the product. The search terms that people use to find products can be managed from the Admin.

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.

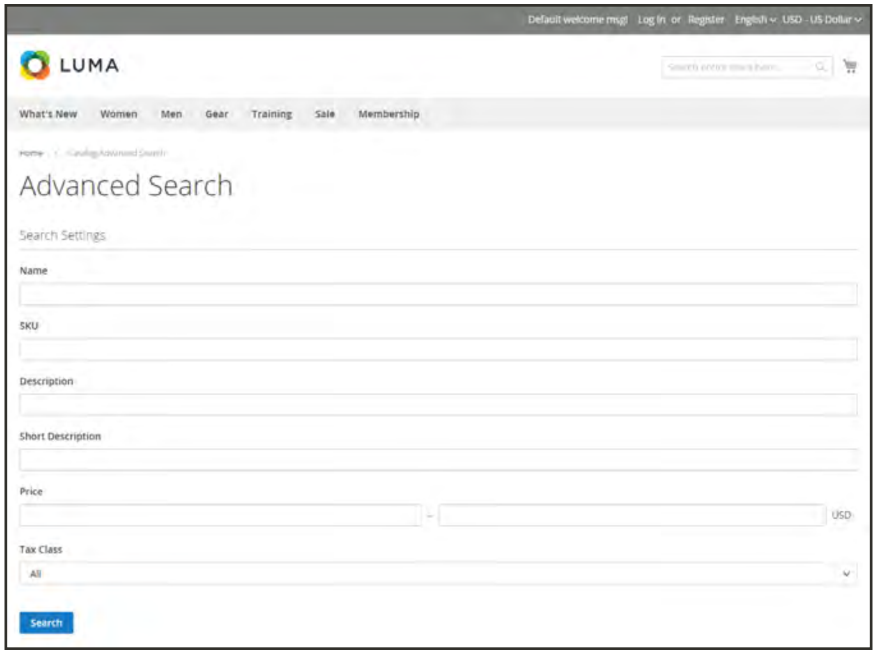
2. Either press the **Enter** key or tap a result in the list of matching products.



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.

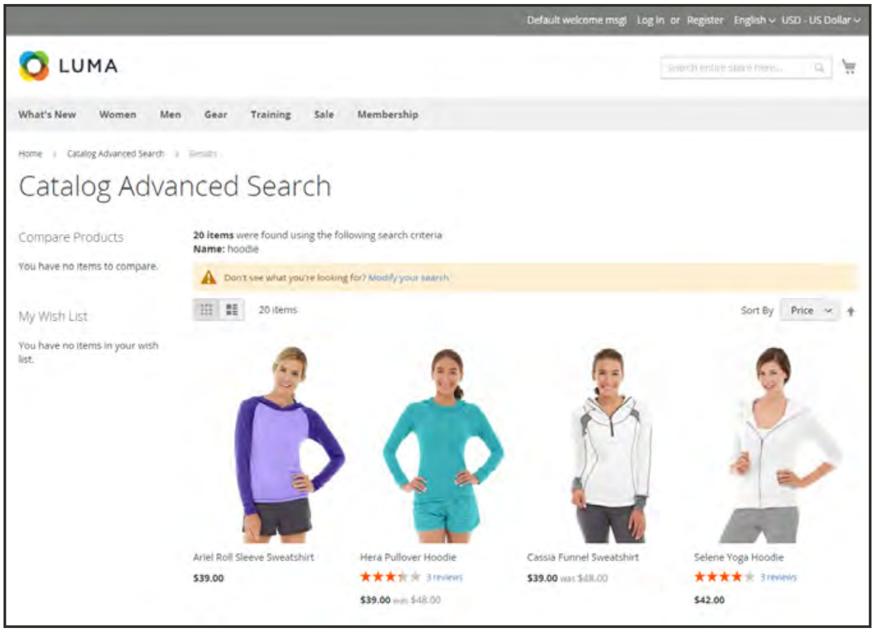


Advanced Search

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.



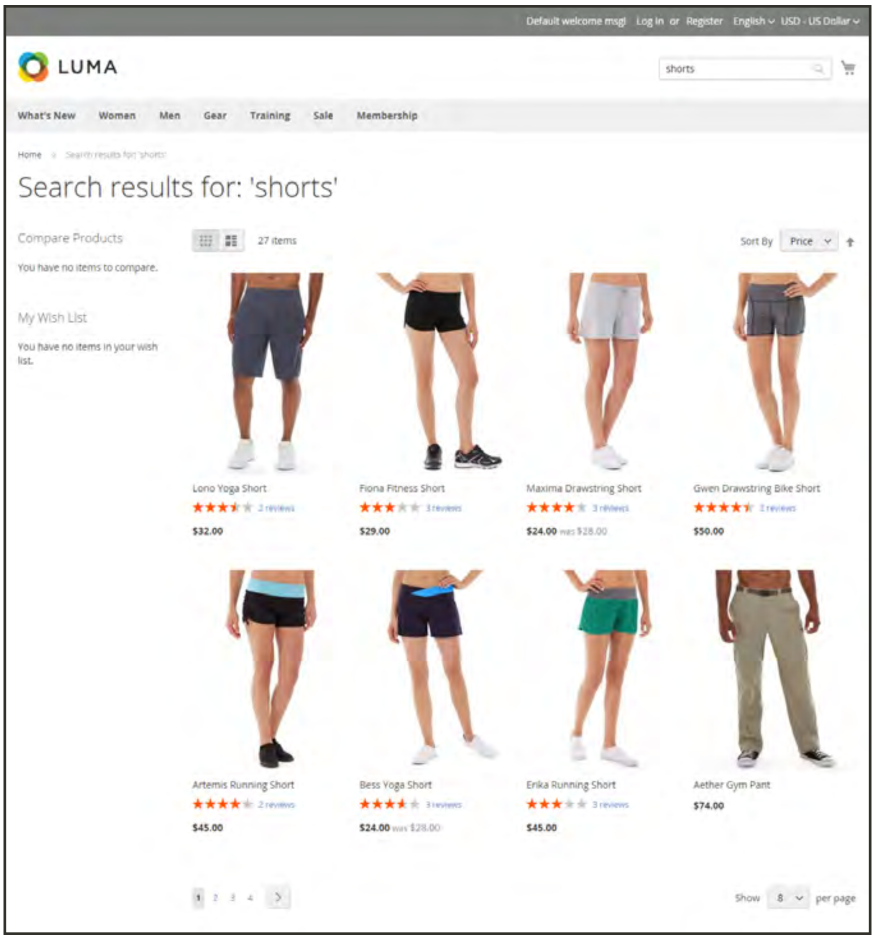
Search Results

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

Weighted Search

Product attributes that are enabled for catalog search can be assigned a weight to give them a higher value in search results. Attributes with a greater weight are returned before those with a lower weight. For example, if there are two attributes in the system, “color” with a search weight of 3 and “description” with a search weight of 1. A search for the word “red,” returns a list of products with a color attribute value of “red,” but does not return products with descriptions that contain the word “red.” In this example, the `color` attribute has a greater weight than the `description` attribute.

Search Weight

To set the search weight properties of an attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. Find the attribute in the list, and open in edit mode.
3. In the panel on the left, choose **Storefront Properties**. Then, do the following:
   a. To include the attribute in search queries, set **Use in Search** to “Yes.”
   b. To establish the search value of the attribute, set **Search Weight** to a number from 1 to 10, where 10 has the highest priority. If no value is entered, all attributes have a search weight of 1.
4. When complete, tap **Save Attribute** button.

Configuring Catalog Search

By default, Magento uses the MySQL search engine. The available options depend on the search engine that is configured for your Magento installation.

MySQL

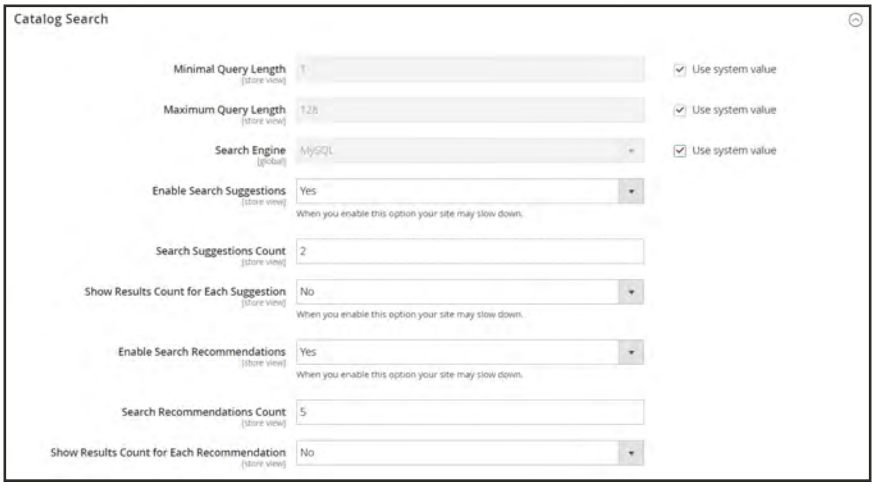
MySQL is the default search engine used by Magento Commerce.

Elasticsearch

Elasticsearch is a powerful and highly scalable distributed search engine that is used by many industry leaders with high-volume sites.

MySQL

MySQL is the default search engine used by Magento Commerce. By adjusting the Catalog Search configuration, you can control the behavior of the search operations and determine the size of valid query text and the display of search recommendations.



MySQL Configuration

To configure MySQL search:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog,** choose **Catalog**.
3. Expand the **Catalog Search** section.
4. To limit the length and word count of search query text, do the following:
   a. Set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
   b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
5. Accept the default, **Search Engine**, "MySQL."
6. To display search suggestions, set **Enable Search Suggestions** to "Yes." Then, do the following:
   a. In the **Search Suggestion Count** field, enter the number of suggestions to offer for each search term that returns no results. The default is 2.
   b. To display the number of search results for each suggested term, set **Show Results Count for Each Suggestion** to "Yes."

7. To offer search recommendations, set **Enable Search Recommendations** to “Yes.” Then, do the following:

   a. In the **Search Recommendations Count** field, enter the number of recommendations that you want to offer. The default is 5.

   a. To display the number of results for each recommendation, set **Show Results Count for Each Recommendation** to “ Yes.”

8. When complete, tap **Save Config**.

Elasticsearch

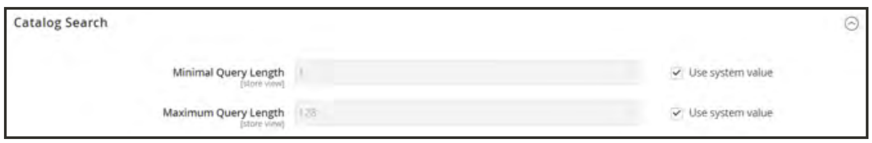
Elasticsearch is a powerful and highly scalable distributed search engine that is used by such high-volume sites as eBay, Wikipedia, and GitHub. The implementation of Elasticsearch includes both search suggestions and recommendations. For installation instructions, see Set up Elasticsearch service in the developer documentation.

Step 1: Set the Query Length

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Catalog**, choose **Catalog**.

3. Expand the **Catalog Search** section. Then, do the following:



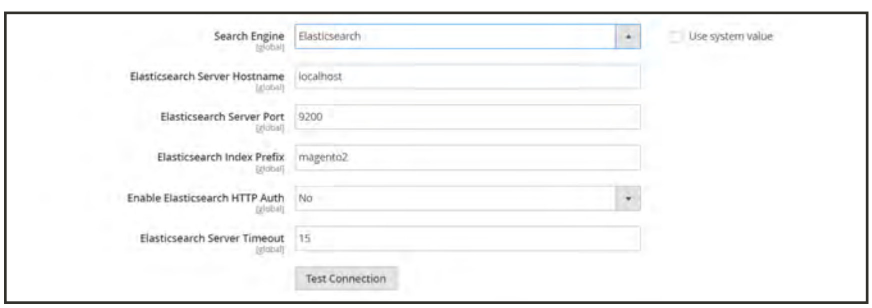
Elasticsearch Query Length

   a. In the **Minimal Query Length** field, enter the minimum number of characters that can be submitted in a query.

   b. In the **Maximum Query Length** field, enter the maximum number of characters that can be submitted in a query.

Step 2: Configure the Elasticsearch Connection

1. After the **Search Engine** field, clear the **Use system value** checkbox. Then, set **Search Engine** to “Elasticsearch,” and do the following:



Elasticsearch Connection Settings

   a. Enter the **Elasticsearch Server Hostname**. The default is: `localhost`.

   b. Enter the **Elasticsearch Server Port**.

   c. In the **Elasticsearch Index Prefix** field, enter a prefix.to identify the Elasticsearch index. For example: Magento2.

d. Set **Enable Elasticsearch HTTP Auth** to "Yes" to use HTTP authentication to prompt for a username and password to access Elasticsearch Server.

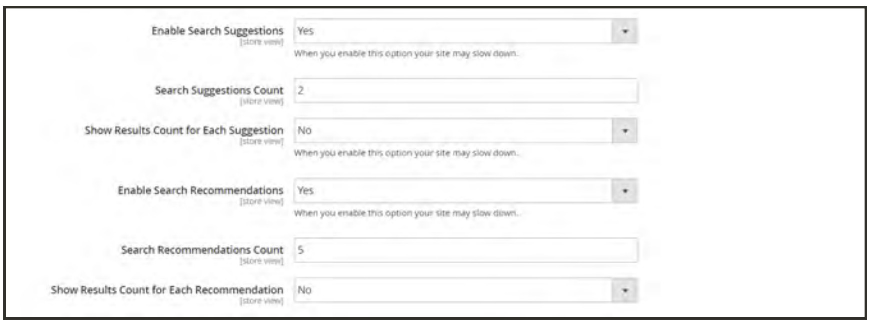
e. In the **Elasticsearch Server Timeout** field, enter the number of seconds before the system times out. The default is: 15.

2. To verify the configuration, tap **Test Connection**.

Step 3: Configure Suggestions and Recommendations

Search suggestions and recommendations can impact server performance.

1. Set **Enable Search Suggestions** to "Yes." Then, do the following:



Elasticsearch Suggestion and Recommendation Settings

a. In the **Search Suggestions Count** field, enter the number of search suggestions to offer.

b. To show the number of results found for each suggestion, set **Show Results for Each Suggestion** to "Yes."

2. To offer recommendations, set **Enable Search Recommendations** to "Yes." Then, do the following:

a. In the **Search Recommendation Count** field, enter the number of recommendations to offer.

b. To show the number of results found for each recommendation, set **Show Results Count for Each Recommendation** to "Yes."

3. When complete, tap **Save Config**.

CHAPTER 39:

Search Terms

You can learn what your customers are looking for by examining the search terms they use to find products in your store. If enough people look for a product that you don't carry, perhaps it's time to add it to your catalog. Meanwhile, rather than have them leave them empty handed, why not redirect them to another product in your catalog? Here are a few ways you can leverage customer search terms:

Landing Page

The landing page for a search term can be a content page, a category page, a product detail page, or even a page on a different site.

Synonyms

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," and your product is listed as a "couch." You can capture a broader range of search terms by entering the words, "sofa" "davenport," and "loveseat" as synonyms for "couch," and direct them to the same landing page.

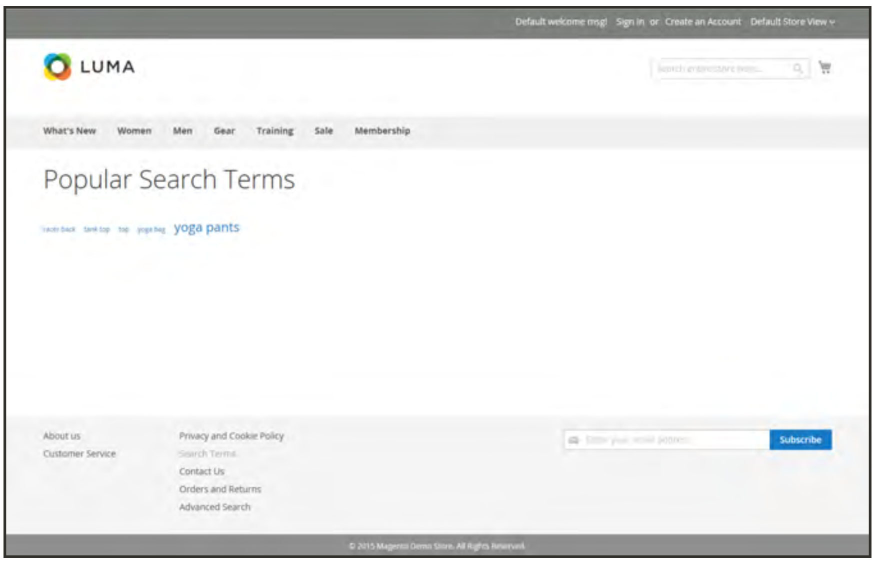
Misspelled Words

Use search terms to capture common misspellings and redirect them to the appropriate page. For example, if you sell wrought iron patio furniture, you know that many people misspell the term as "rod iron," or even "rot iron." You can enter each misspelled word as a search term, and make them synonyms for "wrought iron." Even though the word is misspelled, the search will be directed to the page for "wrought iron."

Popular Search Terms

The Search Terms link in the footer of your store displays the search terms used by visitors to your store, ranked by popularity. Search terms appear in a “tag cloud” format, where the size of the text indicates the popularity of the term.

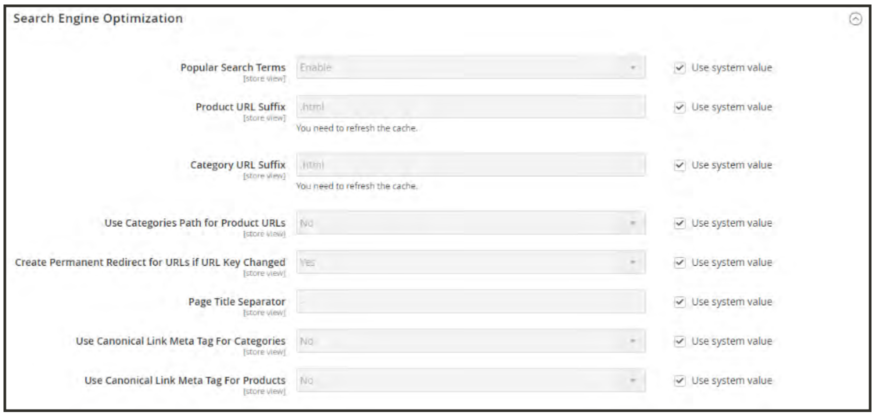
By default, Popular Search Terms is enabled as a search engine optimization tool, but has no direct connection to the catalog search process. Because the Search Terms page is indexed by search engines, any terms on the page can help improve your search engine ranking and the visibility of your store. The URL of the Popular Search Terms page is:
`mystore.com/search/term/popular/`



Popular Search Terms

To configure Popular Search Terms:

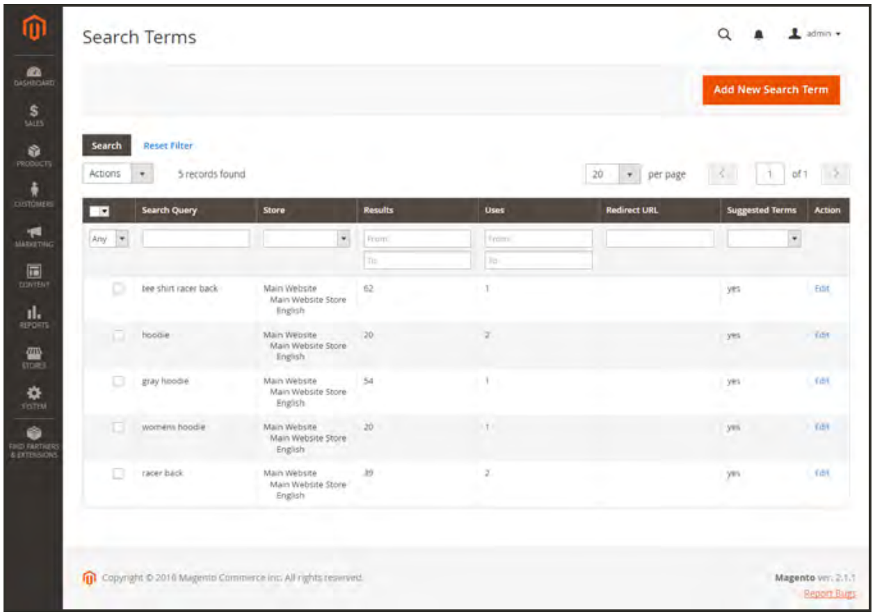
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand the **Search Engine Optimization** section.
4. Clear the **Use system value** checkbox. Then, set **Popular Search Terms** as needed.
5. When complete, tap **Save Config**.



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.

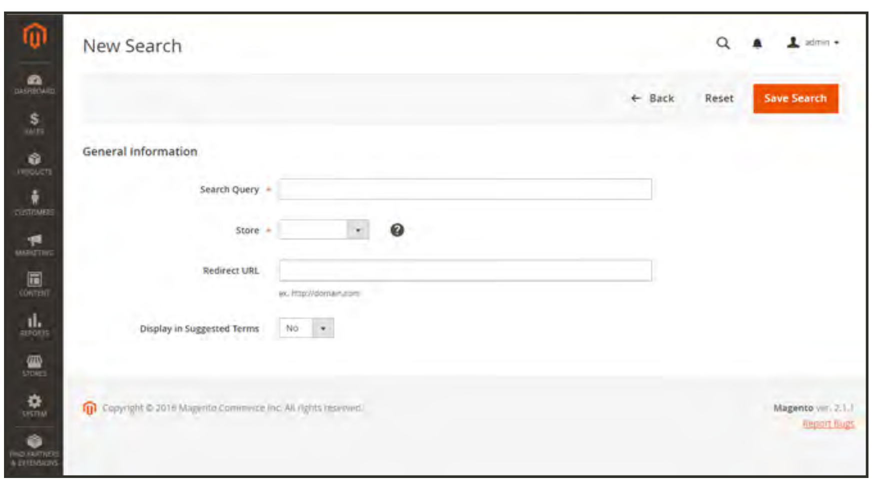


Search Terms

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. Under General Information in the **Search Query** box, type the word or phrase that you want to add as a new search term.

b. If your store is available in multiple languages, choose the applicable **Store** view.

c. To redirect the search results to another page in your store, or to another website, enter the full URL of the target page in the **Redirect URL** field.

d. If you want this term to be available for use as a suggestion whenever a search returns no results, set **Display in Suggested Terms** to “Yes.”

3. When complete, tap **Save Search**.

To edit a search term:

1. In the Search Terms grid, click the row of any record to open the search term in edit mode.
2. Make the necessary changes.
3. When complete, tap **Save Search**.

To delete a search term:

1. In the list, mark the checkbox of the term to be deleted.
2. In the upper-left corner of the list, set **Actions** to “Delete.”
3. When complete, tap **Submit**.

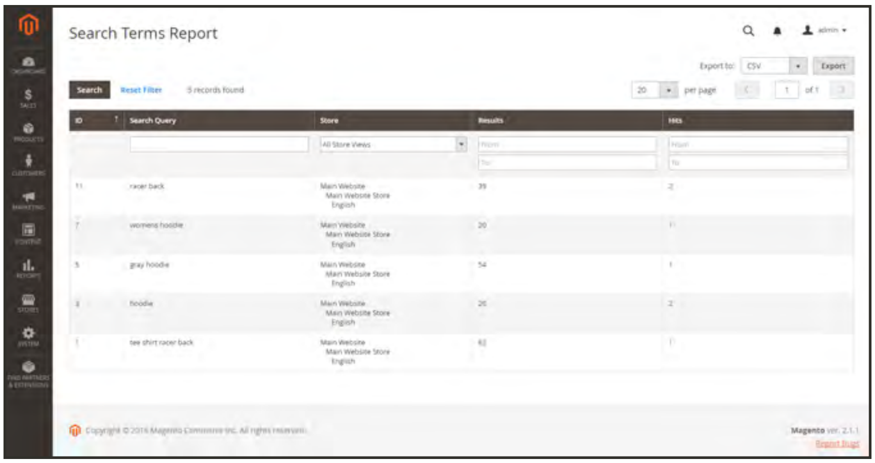
Search Terms Report

The Search Terms report shows the number of results for each term, and the number of times (hits) the term was used. The report data can be filtered by term, store, results, and hits, and exported for further analysis.

To view the search terms report:

1. On the Admin sidebar, tap **Reports**. Then under **Marketing**, choose **Search Terms**.

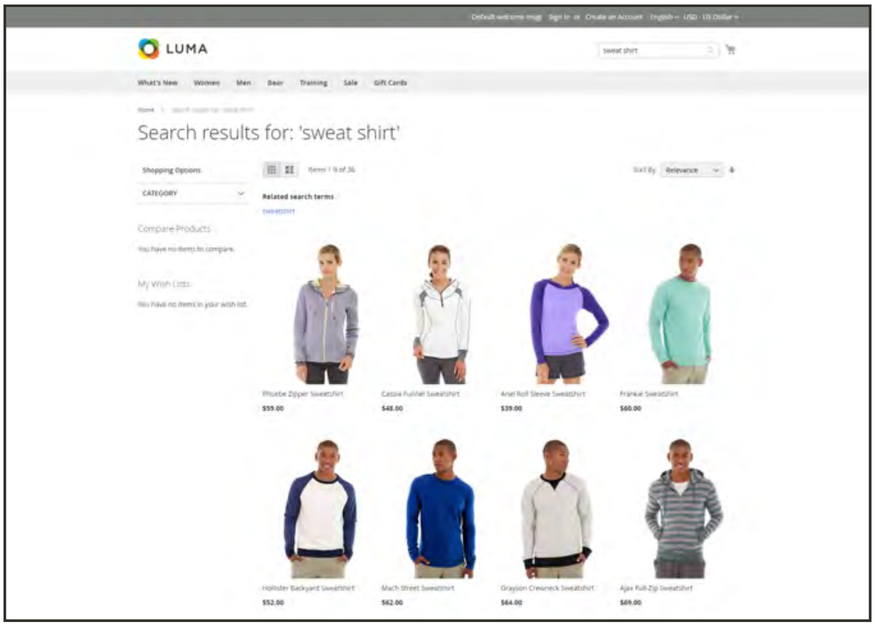
2. Use the controls to filter the report as needed.



Search Terms Report

Search Synonyms

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," while your product is listed as a "couch." Or perhaps they spelled it wrong, or just differently. Is it a sweatshirt, or a sweat shirt? Maybe it's a fleece or a hoodie. You can capture a broad range of search terms by entering all the possible words a customer might use to find your products.

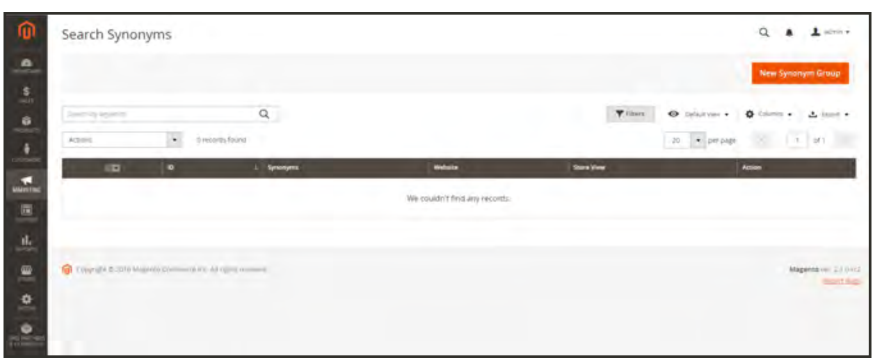


Search Results

To create a new synonym group:

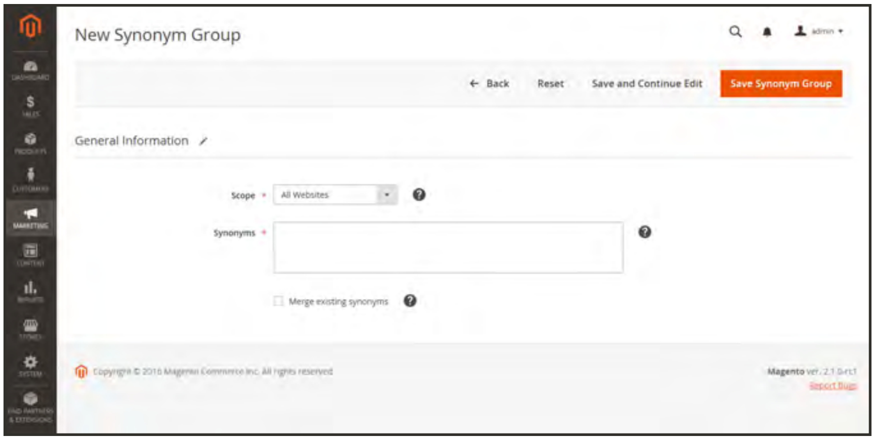
1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **Search Synonyms**.

   The Search Synonyms grid appears. If this is the first time you have used search synonyms, the grid will be empty.



Search Synonyms Grid

2. Tap **New Synonym Group**. Then, do the following:



New Synonym Group

   a. Set **Scope** to the store views whee the synonyms apply.

   b. Enter each synonym in the group, separated by comma. Choose words that people might use as search criteria. For example:

      - sweatshirt, sweat shirt, hoodie, fleece
      - cell phone, mobile phone, smart phone
      - couch, sofa, davenport
      - wrought iron, rot iron, rod iron

   c. To merge these synonyms into a group with others that have the same scope, mark the **Merge existing synonyms** checkbox.

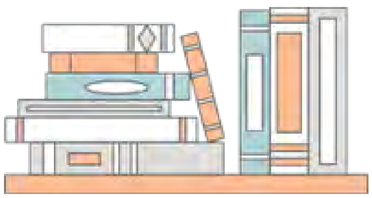
3. When complete, tap **Save Synonym Group**.

Search Synonym Group Saved

CHAPTER 40:

SEO Best Practices

Search engine optimization is the practice of fine-tuning the content and presentation of a site to improve the way the pages are indexed by search engines. Magento Commerce includes a number of features to support your ongoing SEO effort.

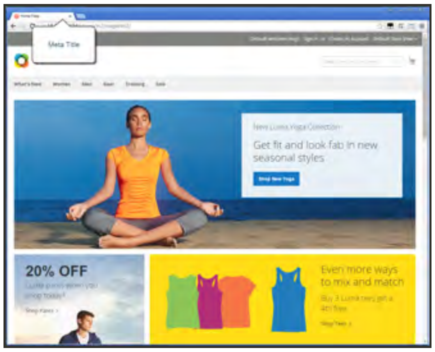


Commerce Resources

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.

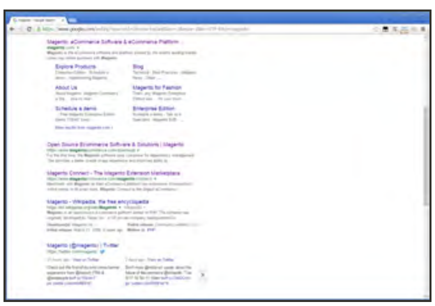


Meta Title

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 seventy characters in length.

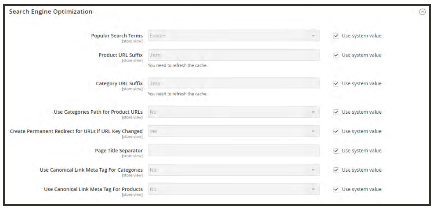
Meta Keywords

Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in the meta title and meta description.



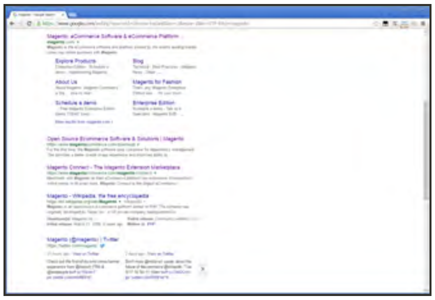
Meta Description

Meta descriptions provide a brief overview of the page for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field will accept up to 255 characters.



Canonical Meta Tag

The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content.



Rich Snippets

Rich snippets provide detailed information for search results listings and other applications. By default, structured data markup that is based on the schema.org standard is added to your store's product template. As a result, more information is available for search engines to include as "rich snippets" in product listings.

Canonical Meta Tag

Some search engines penalize websites that have multiple URLs that point to the same content. The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content. Using the canonical meta tag can improve your site ranking and aggregate pageviews. The canonical meta tag is placed in the <head> block of a product or category page. It provides a link to your preferred URL, so search engines will give it greater weight.

Example 1: Category Path Creates Duplicate URLs

For example, if your catalog is configured to include the category path in product URLs, your store will generate multiple URLs that point to the same product page.

```
http://mystore.com/gear/bags/driven-backpack.html

http://mystore.com/driven-backpack.html
```

Example 2: Category Page Full URL

When canonical meta tags for categories are enabled, the category page of your store includes a canonical URL to the full category URL:

```
http://mystore.com/gear/bags/driven-backpack.html
```

Example 3: Product Page Full URL

When canonical meta tags for products are enabled, the product page includes a canonical URL to the domain-name/product-url-key because product URL keys are globally unique.

```
http://mystore.com/driven-backpack.html
```

If you also include the category path in product URLs, the canonical URL remains domain-name/product-url-key. However, the product can also be accessed using its full URL, which includes the category. For example, if the product URL key is `driven-backpack`, and is assigned to the Gear > Bags category, the product can be accessed using either URL.

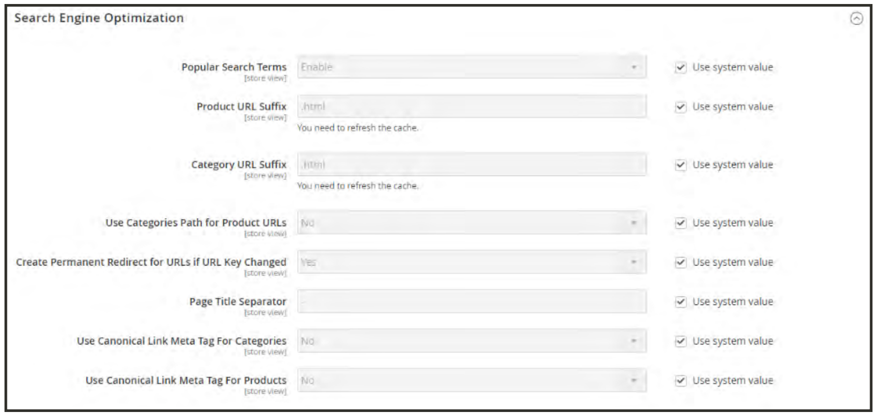
You can avoid being penalized by search engines by omitting the category from the URL, or by using the canonical meta tag to direct search engines to index either by product or category. As a best practice, it is recommended that you enable canonical meta tags for both categories and products.

To enable the canonical meta tag:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose elect **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog.**

3. Expand the **Search Engine Optimization** section.

   To change any field values, you must first clear the **Use system value** checkbox after each field.



Search Engine Optimization

4. If want search engines to index only category pages using the full category path, do the following:

   a. Set **Use Canonical Link Meta Tag for Categories** to “Yes.”

   b. Set **Use Canonical Link Meta Tag for Products** to “No.”

5. If you want search engines to index product pages only using the domain-name/product-url-key format, do the following:

   a. Set **Use Canonical Link Meta Tag for Products** to “Yes.”

   b. Set **Use Canonical Link Meta Tag for Categories** to “No.”

6. When complete, tap **Save Config** .

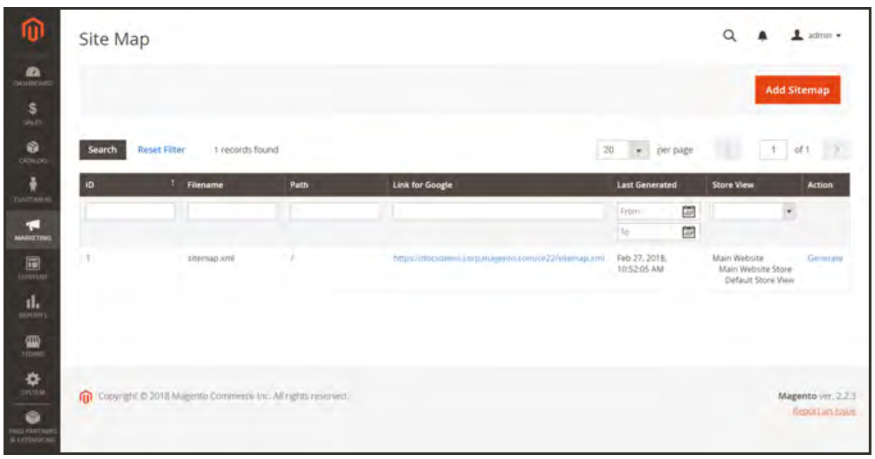
Using a Site Map

A site map improves the way your store is indexed by search engines, and is specifically designed to find pages that might be overlooked by web crawlers. A site map can be configured to index all pages and images.

When enabled, Magento creates a file called `sitemap.xml` that is saved to your installation in the location that you specify. The configuration gives you the ability to set the frequency of the updates, and the priority for each type of content. Your site map should be updated as frequently as the content on your site changes, which might be daily, weekly, or monthly.

While your site is in development, you might include instructions in the `robots.txt` file for webcrawlers to avoid indexing the site. Then before the launch, you can change the instructions to allow the site to be indexed.

For technical information, see: Add sitemap and robots.txt in the developer documentation.



Site Map in Grid

Process Overview:

Step 1: Configure the Site Map

Step 2: Generate the Site Map

Step 3: Configure and Enable robots.txt (Optional)

Step 4: Submit Your Site Map to Search Engines

Step 5: Restore the Previous Robot Instructions (Optional)

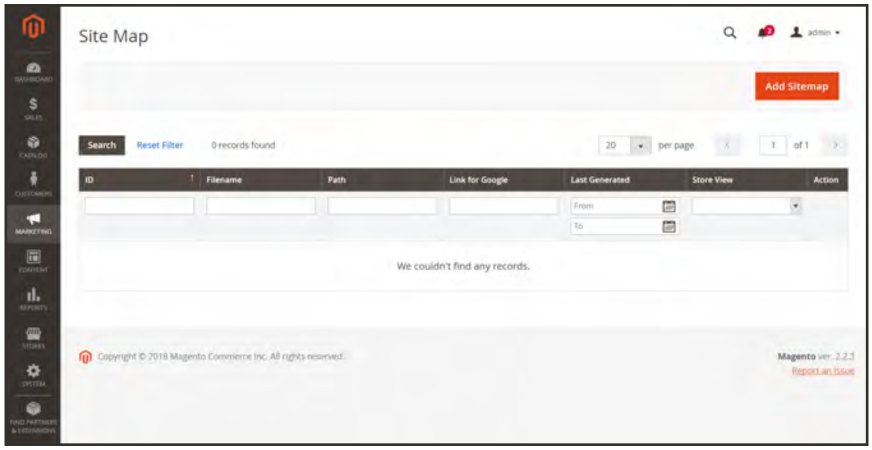
Step 1: Configure the Site Map

Complete the XML Sitemap configuration to determine what is included, and how frequently the site map is updated.

Step 2: Generate the Site Map

1. On the Admin menu, choose **Marketing**. Then under SEO & Search, choose **Site Map**.

2. Tap **Add Site Map**. Then, do the following:



Site Map

a. Enter the site map **Filename**. For example: `sitemap.xml`

b. Enter the **Path** to determine where the site map file is to reside on the server. Make sure that the path is writeable.

/sitemap/	Places the site map file in a directory called "sitemap."
/	Places the site map file at the base path, or root of your Magento installation.

New Site Map

3. When complete, tap **Save & Generate**.

It might take a few minutes for the site map to appear in the grid.

Step 3: Configure and Enable robots.txt (Optional)

Complete the Search Engine Robots configuration with instructions that direct search engines to crawl the parts of your site that you want to be indexed.

Step 4: Submit Your Site Map to Search Engines

You can submit your site map to different search engines by providing them the link to the `sitemap.xml` file in your Magento installation. To copy the link, do the following:

1. In the Site Map grid, right-click the URL in the **Link for Google** column.

2. On the menu, choose **Copy Link Address**.

For more information, see the instructions for the specific search engine. Here are links to instructions for two top search engines:

- Google
- Microsoft Bing

Step 5: Restore Previous Robot Instructions (Optional)

You can now restore either the original, or default restrictions.

Column Descriptions

COLUMN	DESCRIPTION	
ID	The sequential record number of the current site map.	
Filename	The file name of the site map.	
Path	The location where the site map resides on the server. For example:	
	/sitemap/	Places the site map file in a directory called “sitemap,” one level below the root of the Magento installation.
	/	Places the site map file at the base path, or root of the Magento installation.
Link for Google	The URL of the site map that is to be submitted to Google and other search engines.	
Last Generated	Indicates the date and time the site map was last generated.	
Store View	The store view where the site map applies.	
Action	Generate	Regenerates the site map.

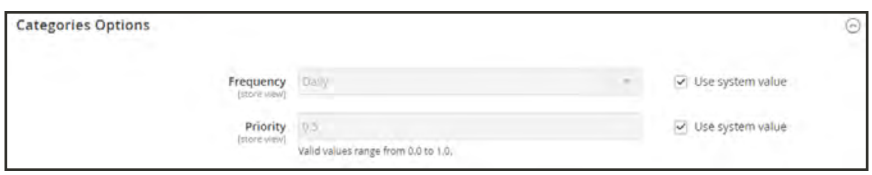
Site Map Configuration

Your site map should be updated as frequently as the content on your site changes, which could be on a daily, weekly, or monthly basis. The configuration lets you set the frequency and priority for each type of content.

Step 1: Set the Frequency and Priority of Content Updates

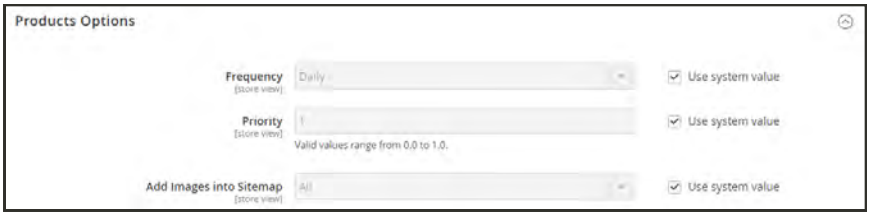
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **XML Sitemap**.
3. Expand the **Categories Options** section. Then, do the following:
   a. Set **Frequency** to one of the following:
      - Always
      - Hourly
      - Daily
      - Weekly
      - Monthly
      - Yearly
      - Never

   b. In the **Priority** field, enter a value between 0.0 and 1.0. Zero has the lowest priority.



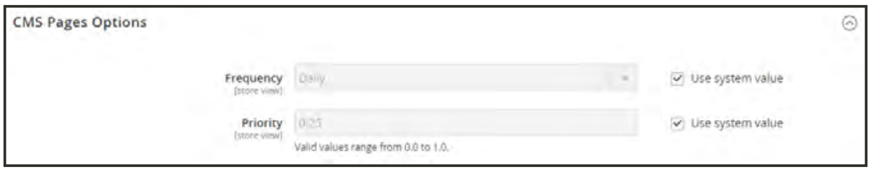
Categories Options

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.

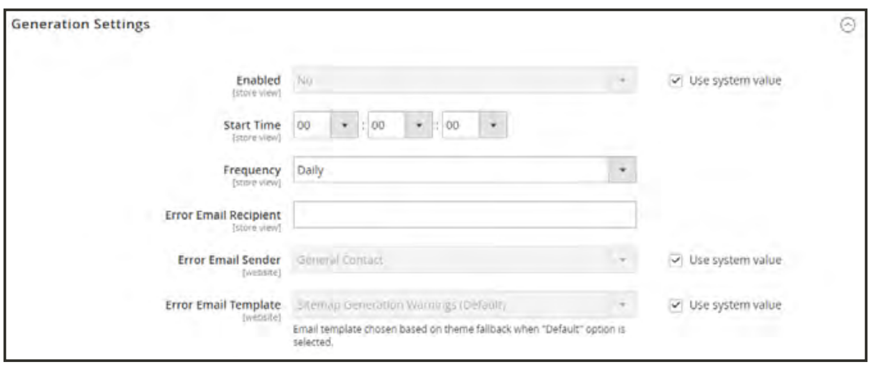


CMS Pages Options

7. When complete, tap **Save Config**.

Step 2: Complete the Generation Settings

1. Expand the **Generation Settings** section.



Generation Settings

2. To generate a sitemap, set **Enabled** to "Yes." Then, do the following:

   a. Set **Start Time** to the hour, minute and second that you want the sitemap to be updated.

   b. Set **Frequency** to one of the following:

   - Daily
   - Weekly
   - Monthly

c. In the **Error Email Recipient** field, enter the email address of the person who is to receive notification if an error occurs during a sitemap update.

d. Set **Error Email Sender** to the store contact who appears as the sender of the error notification.

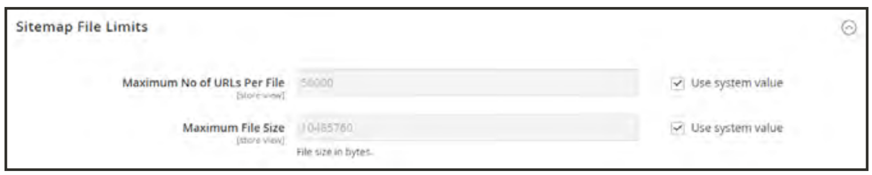
e. Set **Error Email Template** to the template used for the error notification.

Step 3: Set the Site Map File Limits

1. Expand the **Sitemap File Limits** section. Then, do the following:

   a. In the **Maximum No of URLs per File** field, enter the maximum number of URLs that can be included in the sitemap. By default, the limit is 50,000.

   b. In the **Maximum File Size** field, enter the largest size in bytes that is allocated for the sitemap. The default size is 10,485,760 bytes.



Sitemap File Limits

Step 4: Set the Search Engine Submission Settings

1. Expand the **Search Engine Submission Settings** section.

2. If using a robots.txt file to provide instructions to search engines that crawl your site, set **Enable Submission to Robots.txt** to "Yes."

Search Engine Submission Settings

3. When complete, tap **Save Config**.

Search Engine Robots

The Magento configuration includes settings to generate and manage instructions for web crawlers and bots that index your site. The instructions are saved in a file called "robots.txt" that resides in the root of your Magento installation. The instructions are directives that are recognized and followed by most search engines.

By default, the robots.txt file that is generated by Magento contains instructions for web crawler to avoid indexing certain parts of the site that contain files that are used internally by the system. You can use the default settings, or define your own custom instructions for all, or for specific search engines. There are many articles online that explore the subject in detail.

Example: Custom Instructions

Allows Full Access

```
User-agent:*
Disallow:
```

Disallows Access to All Folders

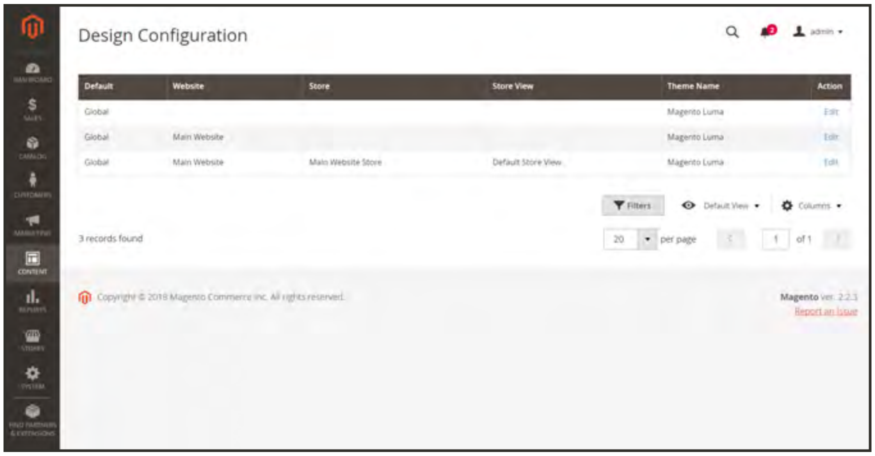
```
User-agent:*
Disallow: /
```

Default Instructions

```
Disallow: /lib/

Disallow: /*.php$

Disallow: /pkginfo/

Disallow: /report/

Disallow: /var/

Disallow: /catalog/

Disallow: /customer/

Disallow: /sendfriend/

Disallow: /review/

Disallow: /*SID=
```

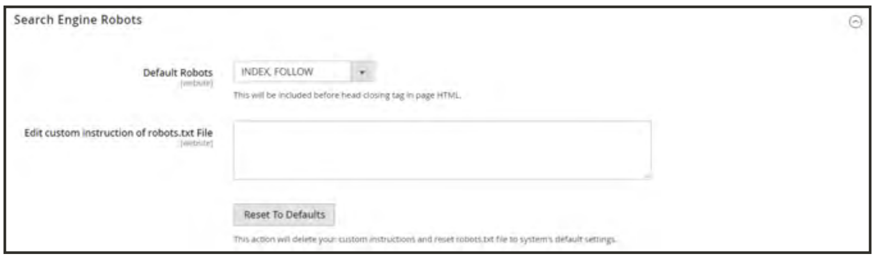
To configure robots.txt:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the **Global** configuration in the first row of the grid, and click **Edit**.



Global Design Configuration

3. Scroll down and expand the **Search Engine Robots** section. Then, do the following:



Search Engine Robots

a. Set **Default Robots** to one of the following:

`INDEX, FOLLOW`	Instructs web crawlers to index the site and to check back later for changes.
`NOINDEX, FOLLOW`	Instructs web crawlers to avoid indexing the site, but to check back later or changes.
`INDEX, NOFOLLOW`	Instructs web crawlers to index the site once, but to not check back later for changes.
`NOINDEX, NOFOLLOW`	Instructs web crawlers to avoid indexing the site, and to not check back later for changes.

b. If needed, enter custom instructions into the **Edit Custom instruction of robots.txt file** box: For example, while a site is in development, you might want to disallow access to all folders.

c. To restore the default instructions, tap **Reset to Default**.

4. When complete, tap **Save Configuration**.

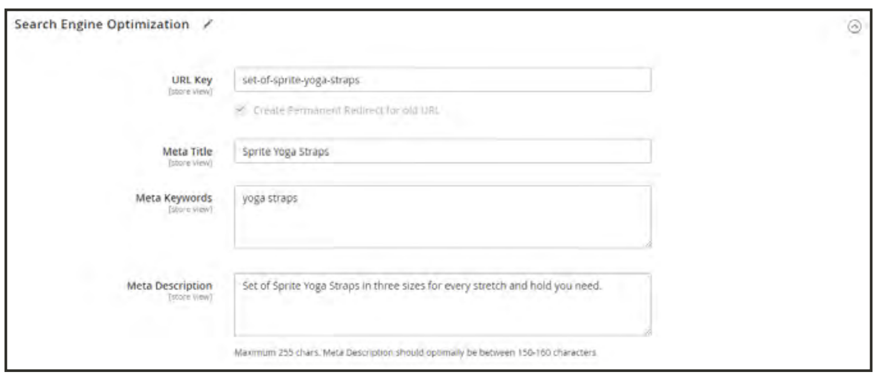
CHAPTER 41:

URL Rewrites

The URL Rewrite tool lets you change any URL that is associated with a product, category, or CMS page. When the rewrite goes into effect, any links that point to the previous URL are redirected to the new address.

The terms rewrite and redirect are often used interchangeably, but refer to slightly different processes. A URL rewrite changes the way a URL appears in the browser. A URL redirect, on the other hand, updates the URL that is stored on the server. A URL redirect can be either temporary or permanent. Your store uses URL rewrites and redirects to make it easy for you to change the URL key of a product, category, or page and preserve existing links.

By default, automatic URL redirects are enabled for your store. The "Create Permanent Redirect for old URL" checkbox is marked under the URL key field of each product.



Create Permanent Redirect for Old URL

Configuring URL Rewrites

URL rewrites make it possible to make existing URLs more "search engine friendly" and also easier for humans to read. Enabling Web Server Apache Rewrites is part of the initial Magento setup. Magento routinely uses URL rewrites to remove the file name "index.php" that normally appears in the URL just after the root folder. When Web Server Rewrites are enabled, the system rewrites each URL to omit "index.php." The rewrite removes words that convey nothing of value to search engines or customers, and has no impact on performance or site rank.

URL without Web Server Rewrite

```
http://www.yourdomain.com/magento/index.php/storeview/url-identifier
```

URL with Web Server Rewrite

```
http://www.yourdomain.com/magento/storeview/url-identifier
```

To configure URL rewrites:

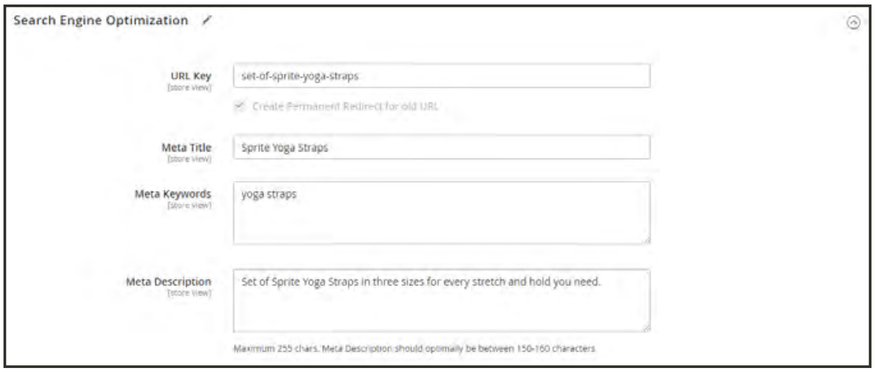
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand the **Search Engine Optimization** section.

Search Engine Optimization

4. Set **Use Web Server Rewrites** to your preference.
5. When complete, tap **Save Config**.

Automatic Product Redirects

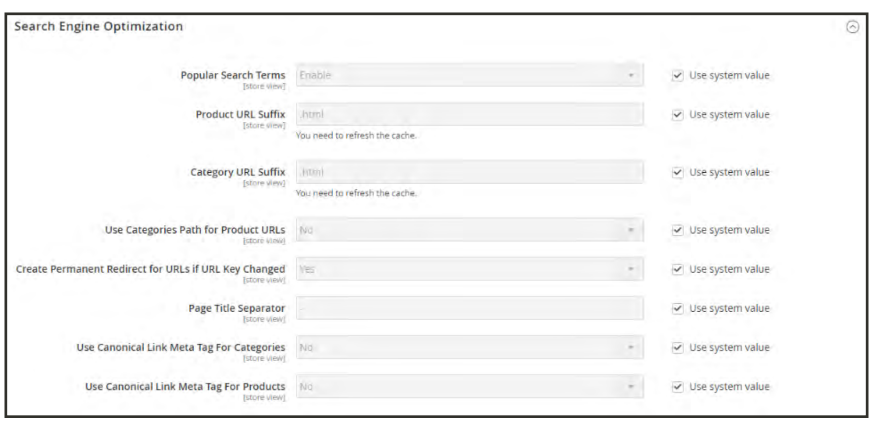
Your store can be configured to automatically generate a permanent redirect whenever the URL key of a product or category changes. In the Search Engine Optimization section, the checkbox below the URL key indicates if permanent redirects are enabled. If your store is already configured to automatically redirect catalog URLs, making a redirect is as easy as updating the URL key. The process to create an automatic redirect is the same for both products and categories.



Create Permanent Redirect for Old URL

To set up automatic redirects:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, select **Catalog**.
3. Expand the **Search Engine Optimization** section.
4. Set **Create Permanent Redirect for URLs if URL Key Changed** to "Yes."
5. When complete, tap **Save Config**.



Search Engine Optimization

To automatically redirect product URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find the product in the list, and click to open the record.
3. Expand the **Search Engine Optimization** section. Then in the **URL Key** field, do the following:
   a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to enable automatic redirects.
   b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, tap **Save**.
5. When prompted to refresh the cache, follow the links in the message at the top of the workspace. The permanent redirect is now in effect for the product and any associated category URLs.

To automatically redirect category URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. Find the category in the tree, and click to open the record.
3. Expand the **Search Engine Optimization** section. Then in the **URL Key** field, do the following:
   a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to enable automatic redirects.
   b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
4. When complete, tap **Save**.
5. When prompted to refresh the cache, follow the links in the message at the top of the workspace. The permanent redirect is now in effect for the category and any associated product URLs.

Creating URL Rewrites

The URL Rewrite tool can be used to create product and category rewrites, and custom rewrites for any page in your store. When the rewrite goes into effect, any existing links that point to the previous URL are seamlessly redirected to the new address.

URL rewrites can be used to add high-value keywords to improve the way the product is indexed by search engines. You can also use rewrites to create additional URLs for a temporary seasonal change, or permanent change. Rewrites can be created for any valid path, including CMS content pages. Internally, the system always references products and categories by their ID. No matter how often the URL changes, the ID remains the same. Here are some ways you can use URL rewrites:

System URL

```
http://www.example.com/catalog/category/id/6
```

Original URL

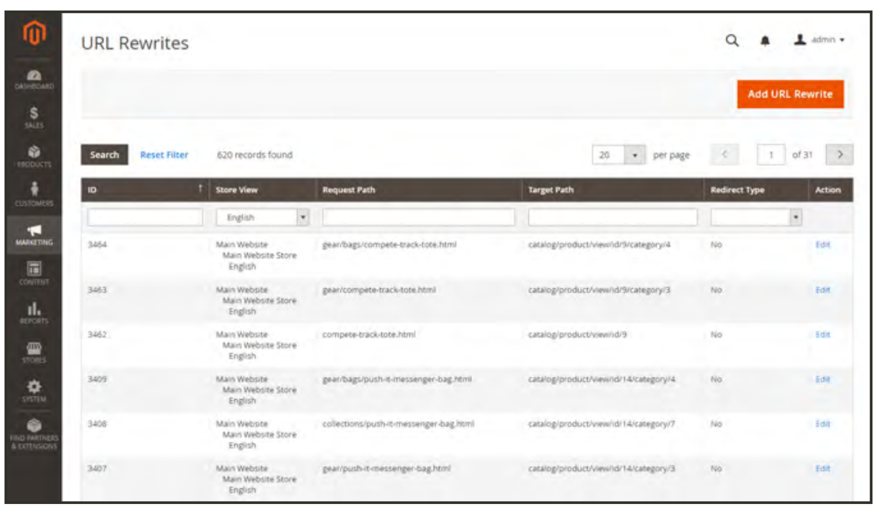
```
http://www.example.com/peripherals/keyboard.html
```

Redirected Product URL

```
http://www.example.com/ergonomic-keyboard.html
```

Additional Category URLs

```
http://www.example.com/all-on-sale.html

http://www.example.com/save-now/spring-sale
```

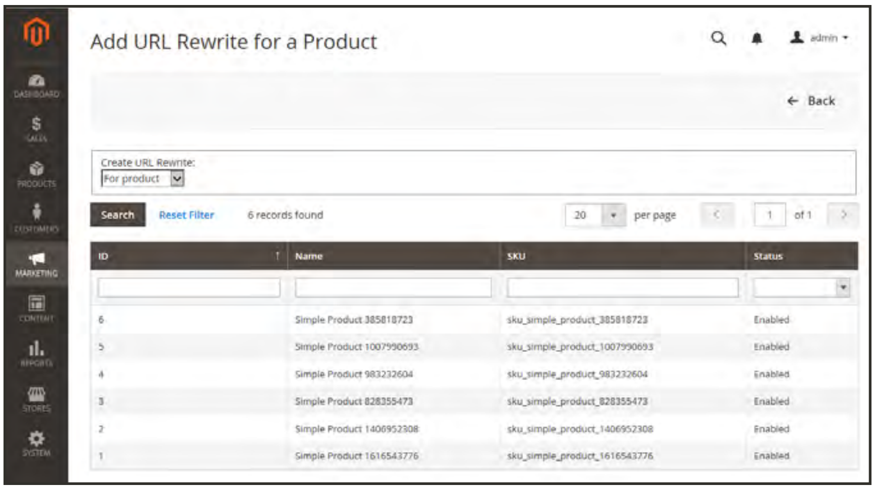


URL Rewrites

Product Rewrites

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

If automatic redirects are enabled for your store, there is no need to create a rewrite when a product URL Key is changed.



Add URL Rewrite for Product

Process Overview:

Step 1. Plan the Rewrite

Step 2: Create the Rewrite

Step 3. Test the Result

Step 1: Plan the Rewrite

1. To avoid mistakes, write down the "redirect to" path and "redirect from" path. The path includes the URL Key and suffix, if applicable.

   If you're not sure, open each product page in your store, and copy the path from the address bar of your browser. When creating a product redirect, you can either include or exclude the category path. For this example, we create a product redirect without a category path.

Product with Category Path

Redirect to:	`gear/bags/impulse-duffle.html`
Redirect from:	`gear/bags/overnight-duffle.html`

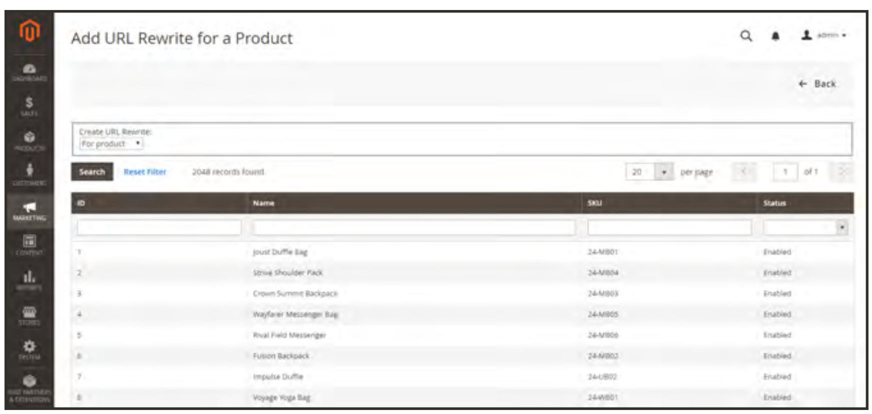
Product without Category Path

Redirect to: `impulse-duffle.html`

Redirect from: `overnight-duffle.html`

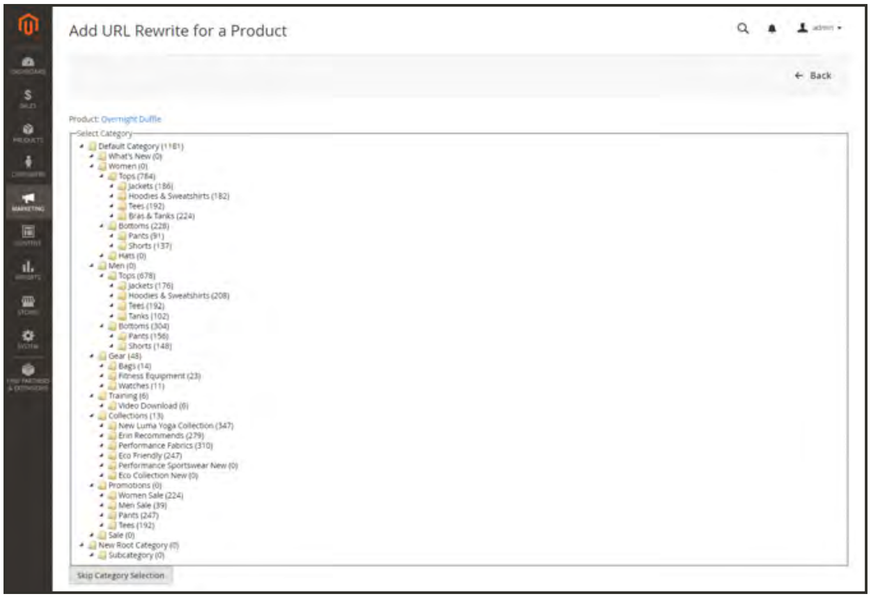
Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **Search & SEO**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available.
   a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
   b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
   c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. In the upper-right corner of the URL Rewrites page, tap **Add URL Rewrite**.
4. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
5. Set **Create URL Rewrite** to "For product."
6. In the grid, find the product that is the target—or destination—of the redirect. Then, click the row.



Add URL Rewrite for a Product

7. Below the category tree, tap **Skip Category Selection**. For this example, the redirect does not include a category.



Skip Category Selection

The Add URL Rewrite for a Product page displays a link to the target in the upper-left corner, and the Target Path field displays the system version of the path, which cannot be changed. Initially, the Redirect Path field also displays the target path.

a. If you have multiple store views, set **Store** to the view where the rewrite applies Otherwise, a rewrite will be created for each view.

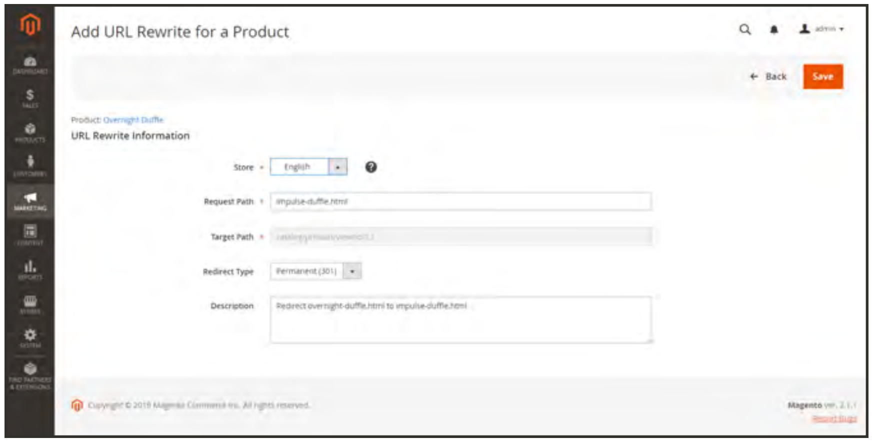
b. In the **Request Path** field, type over the default entry, and enter the URL key and suffix—if applicable—of the original product request. This is the "Redirect from" product that you identified in the planning step.

> The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

c. Set **Redirect Type** to one of the following:

- Temporary (302)
- Permanent (301)

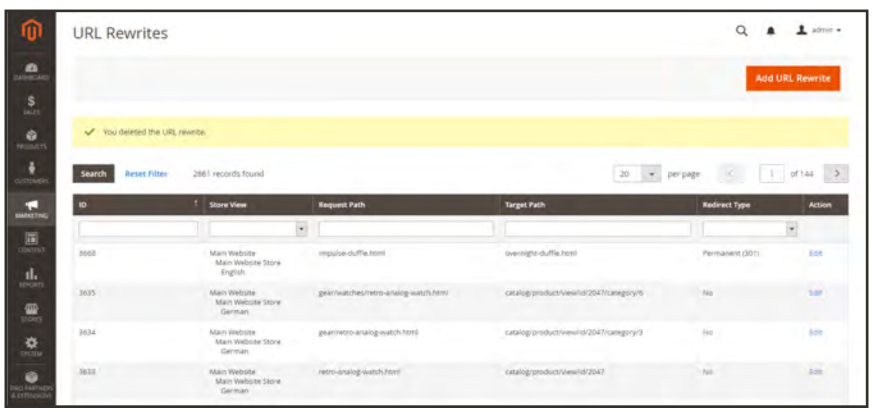
d. For your own reference, enter a brief **Description** of the rewrite.



URL Rewrite Information

8. Before saving the redirect, review the following:
   - The link in the upper-left corner displays the name of the target product.
   - The Request Path contains the path for the original "redirect from" product.
9. When complete, tap **Save**.

   The new product rewrite now appears at the top of the URL Rewrites grid.



URL Rewrite Saved

Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
   - Navigate to the original "redirect from" product request page.
   - In the address bar of the browser, enter the path to the original "redirect from" product immediately after the store URL. Then, press **Enter**.

   The new target product appears instead of the original product request.

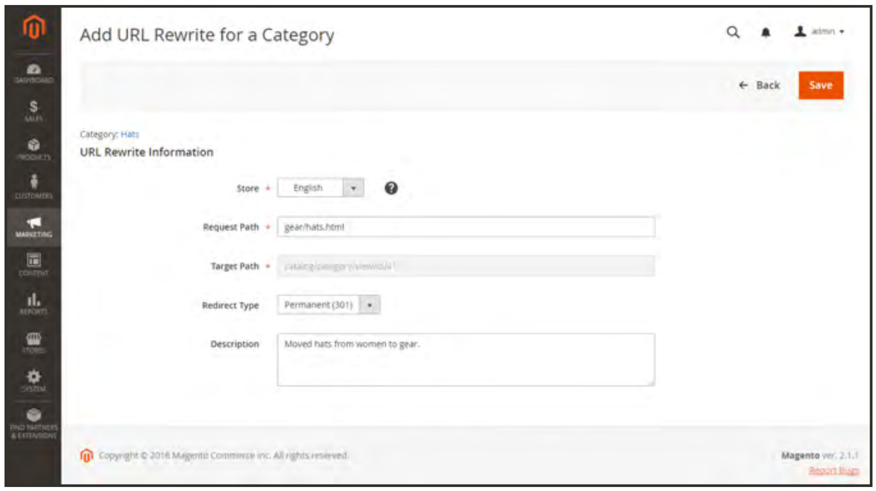
Field Descriptions

<table>
<tr><th>FIELD</th><th>DESCRIPTION</th></tr>
<tr><td>Create URL Rewrite</td><td>Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options:
Custom
For category
For product
For CMS page</td></tr>
<tr><td>Request Path</td><td>The product that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and category.
The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.</td></tr>
<tr><td>Target Path</td><td>The internal path that is used by the system to point to the destination of the redirect. The target path is grayed out and cannot be edited.</td></tr>
<tr><td>Redirect</td><td>Determines the type of redirect. Options :
<table>
<tr><td>No</td><td>No redirect is specified.
Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.</td></tr>
<tr><td>Temporary (302)</td><td>Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.</td></tr>
<tr><td>Permanent (301)</td><td>Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.</td></tr>
</table></td></tr>
<tr><td>Description</td><td>Describes the purpose of the rewrite for internal reference.</td></tr>
</table>

Category Rewrites

If a category is removed from your catalog, you can use a category rewrite to redirect links to the URL of another category in your store. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.

If automatic redirects are enabled for your store, there is no need to create a rewrite when a category URL Key is changed.



URL Rewrite for Category

Process Overview:

Step 1: Plan the Rewrite

Step 2: Create the Rewrite

Step 3: Test the Result

Step 1: Plan the Rewrite

1. To avoid mistakes, write down the "redirect to" path and "redirect from" path. The paths should include the URL Key and suffix, if applicable.

   If you're not sure, open each category page in your store, and copy the path from the address bar of your browser.

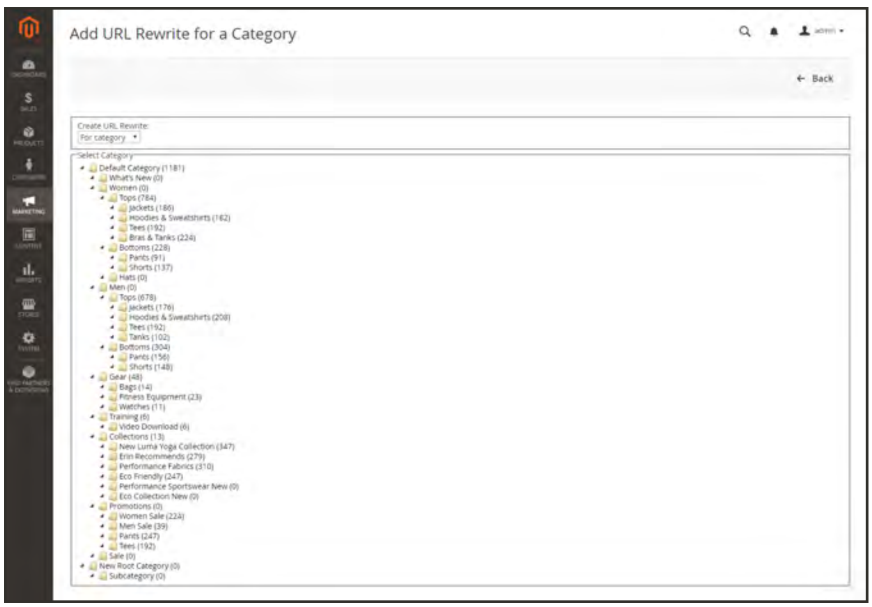
   Category Path

   Redirect to: `gear/backpacks-and-bags.html`

   Redirect from: `gear/bags.html`

Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available,
   a. In the search filter at the top of the **Request Path** column, enter the URL key of the category that is to be redirected. Then, tap **Search**.
   b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
   c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to “For category.” Then in the category tree, choose the target category that is the destination of the redirect.



Category Tree

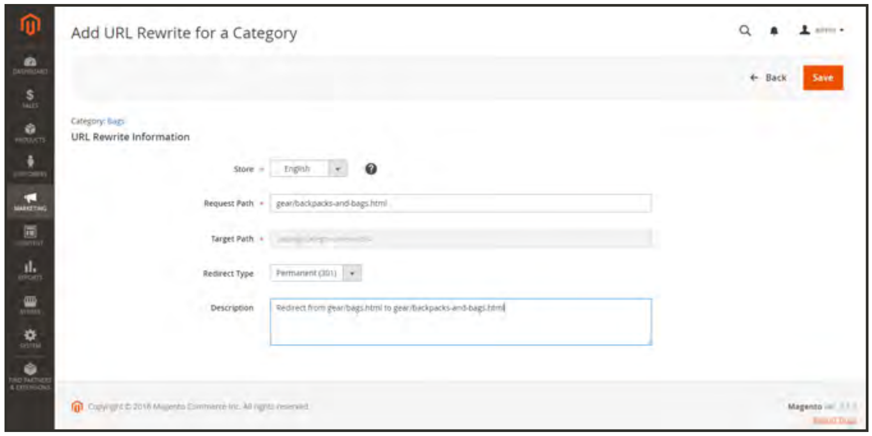
5. In the URL Rewrite section, do the following:
   a. If you have multiple stores, select the **Store** where the rewrite applies.
   b. In the **Request Path** field, enter the URL key of the category that the customer requests. This is the "redirect from" category.

   > The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

   c. Set **Redirect**to one of the following:

- Temporary (302)
- Permanent (301)

d. For your reference, enter a brief description of the rewrite.



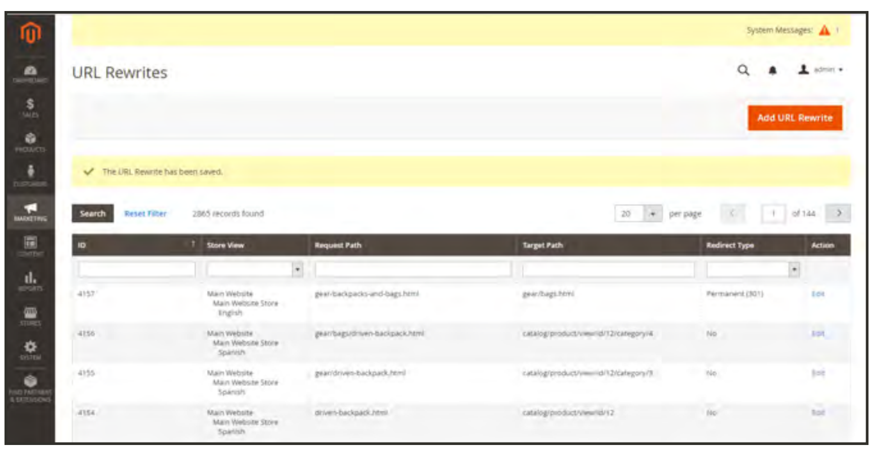
Category Rewrite Information

6. Before saving the redirect, review the following:

- The link in the upper-left corner displays the name of the target category.
- The Request Path contains the path for the original "redirect from" category.

7. When complete, tap **Save** button.

The new category rewrite appears at the top of the URL Rewrites grid.



New Category Rewrite

Step 3: Test the Result

1. Go to the home page of your store.

2. Do one of the following:

- Navigate to the original "redirect from" category.
- In the address bar of the browser, enter the path to the original "redirect from" category immediately after the store URL. Then, press **Enter**.

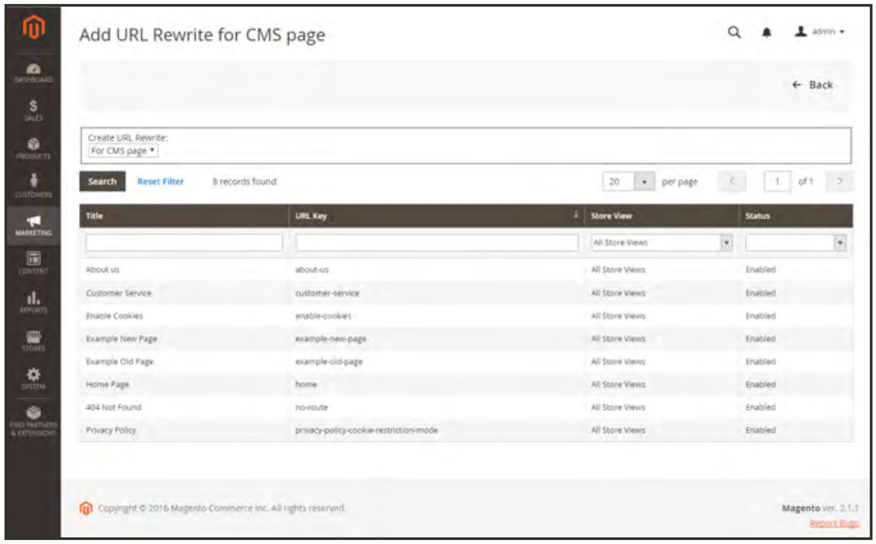
The new target category appears instead of the original category request.

Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page
Request Path	The category that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix, and parent category. The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.
Target Path	The internal path that is used by the system to point to the destination of the redirect. The target path is grayed out and cannot be edited.
Redirect	Determines the type of redirect. Options : **No** — No redirect is specified. Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view. **Temporary (302)** — Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites. **Permanent (301)** — Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.

CMS Page Rewrites

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "source," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.



Add URL Rewrite

Process Overview:

Step 1: Plan the Rewrite

Step 2: Create the Rewrite

Step 3: Test the Result

Step 1: Plan the Rewrite

1. To avoid mistakes, write down the URL key of the "redirect to" page and "redirect from" page.

   If you're not sure, open each page in your store, and copy the path from the address bar of your browser.

CMS Page Path

Redirect to:	`new-page`
Redirect from:	`old-page`

Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.

2. Before you proceed, do the following to verify that the "request path" is available.

   a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.

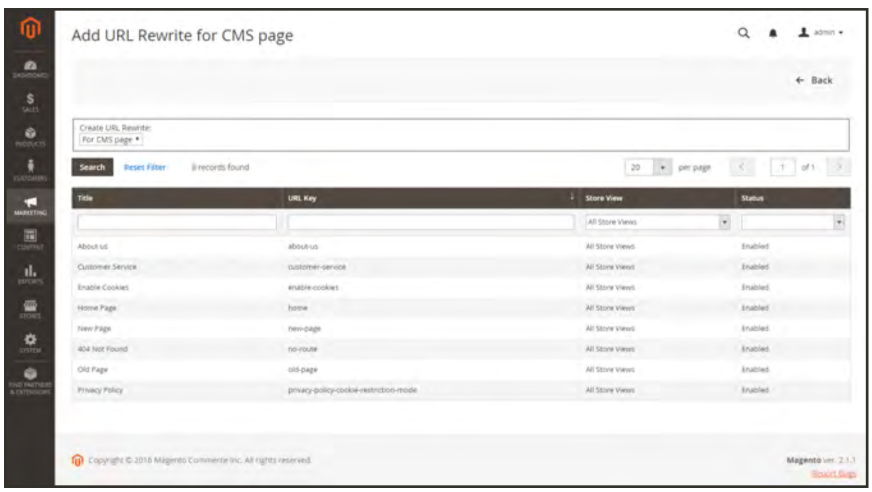
   b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.

   c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.

3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.

4. Set **Create URL Rewrite** to “for CMS page.”

5. Find your new target page in the grid, and open in edit mode.



Custom URL Rewrite

6. Under URL Rewrite Information, do the following:

   a. If you have multiple store views, select the **Store** where the rewrite applies.

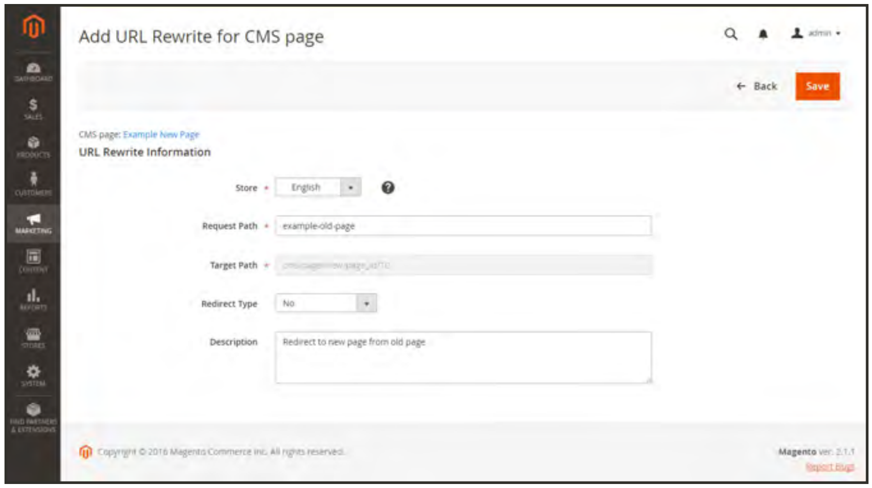
   b. In the **Request Path** field, enter the URL key of the original page that the customer requests. This is the "redirect from" page.

   > The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

   c. Set **Redirect** to one of the following:

- Temporary (302)
- Permanent (301)

d. For your reference, enter a brief description of the rewrite.



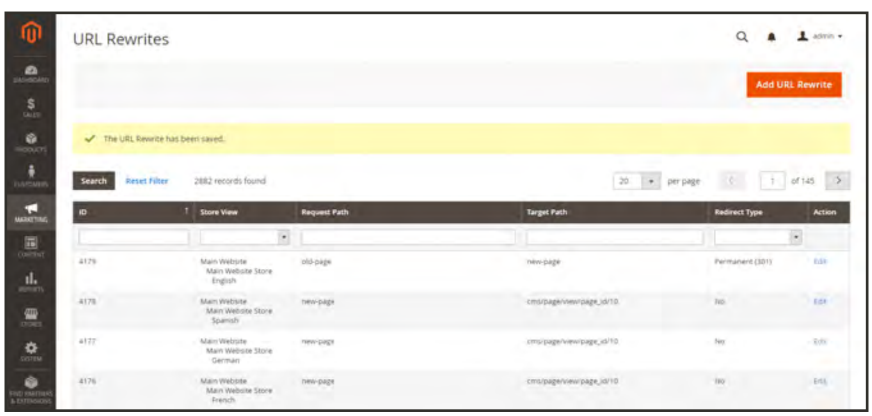
Custom URL Rewrite

7. Before saving the redirect, review the following:

- The link in the upper-left corner displays the name of the target page.
- The Request Path contains the path for the original "redirect from" page.

8. When complete, tap **Save**.

The new rewrite appears in the grid at the top of the list.



Saved URL Rewrite

Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
   - Navigate to the original "redirect from" page.
   - In the address bar of the browser, enter the name of the original "redirect from" page immediately after the store URL. Then, press **Enter**.

The new target page appears instead of the original page request.

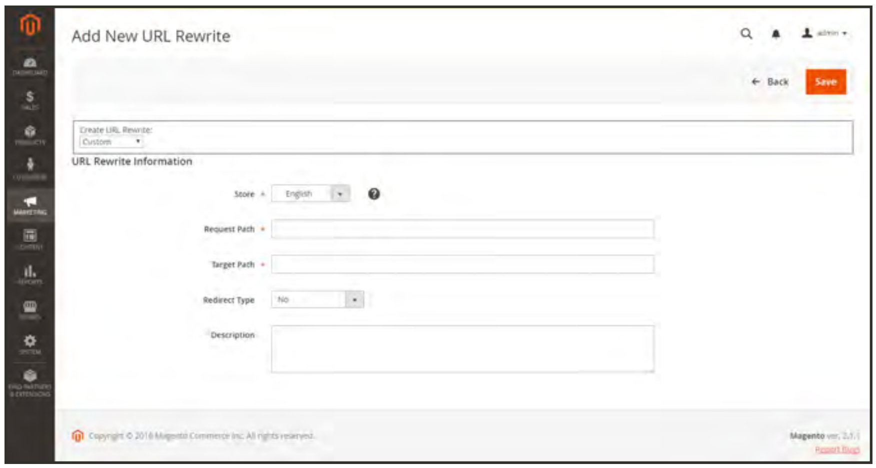
Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page
Request Path	The CMS page that is to be redirected. The Request Path must be unique, and cannot be in use by another redirect. If you receive an error message that the Request Path already exists, delete the existing redirect, and try again.
Target Path	The internal path that is used by the system to point to the destination. The target path is grayed out and cannot be edited.
Redirect	Determines the type of redirect. Options : **No**: No redirect is specified. **Temporary (302)**: Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites. **Permanent (301)**: Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.

Custom Rewrites

A custom rewrite can be used to manage miscellaneous redirects, such as redirecting a page from your store to an external website. For example, you might have two Magento websites, each with their own domain. You can use a custom redirect to reroute requests for a product, category, or page to the other website. Unlike other redirect types, the target of a custom redirect is not chosen from a list of existing pages in your store.

Before you begin, make sure that you understand exactly what the redirect is to accomplish. Think in terms of "target" and "original request," or "redirect to" and "redirect from." Although people might still navigate to the former page from search engines or outdated links, the redirect causes your store to switch to the new target.



Add URL Rewrite

Process Overview:

Step 1: Plan the Rewrite

Step 2: Create the Rewrite

Step 3: Test the Result

Step 1: Plan the Rewrite

1. To avoid mistakes, write down the URL of the "redirect to" page, and the URL key of the "redirect from" page.

   If you're not sure, open each page, and copy the URL from the address bar of your browser.

   Custom Path

   Redirect to: `http://www.different-website.com/page.html`

   Redirect from: `cms-page`

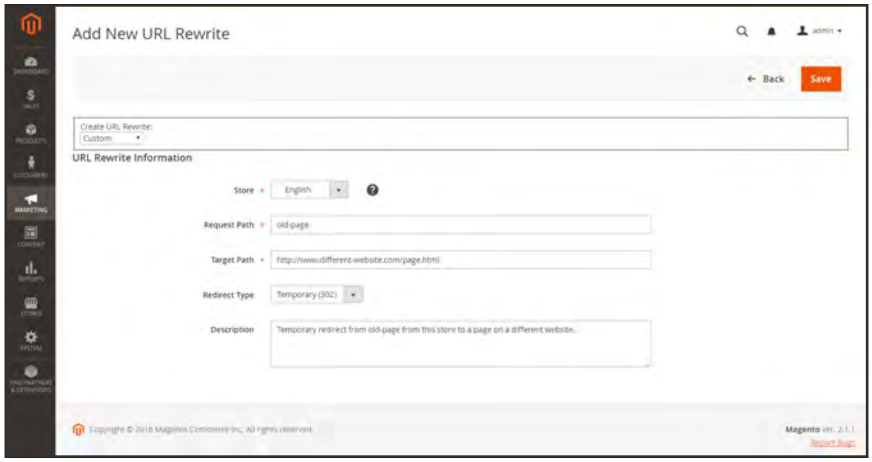
```
category.html

category/subcategory.html

product.html

category/product.html
```

Step 2: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. Before you proceed, do the following to verify that the "request path" is available:
   a. In the search filter at the top of the **Request Path** column, enter the URL key of the page that is to be redirected. Then, tap **Search**.
   b. If there are multiple redirect records for the page, find the one that matches the applicable store view. Then, open the redirect record in edit mode.
   c. In the upper-right corner, tap **Delete**. When prompted, tap **OK** to confirm.
3. When you return to the URL Rewrites page, tap **Add URL Rewrite**.
4. Set **Create URL Rewrite** to "Custom."
5. Under URL Rewrite Information, do the following:
   a. If you have multiple store views, select the **Store** where the rewrite applies.
   b. In the **Request Path** field, enter the URL key and path—if applicable—of the product, category, or CMS page that is to be redirected.

      > The Request Path must be unique for the specified store. If there is already a redirect that uses the same Request Path, you will receive an error when you try to save the redirect. The previous redirect must be deleted before you can create a new one.

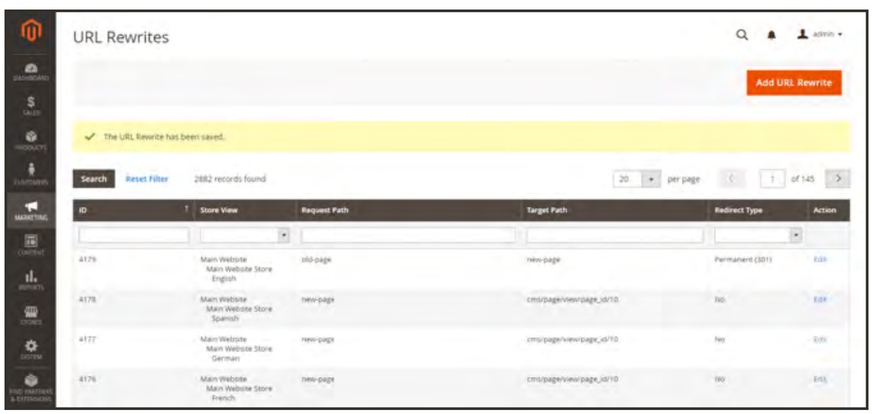
   c. In the **Target Path** field, enter the URL of the destination. If the target is located on another website, enter the fully qualified URL.
   d. Set **Redirect**to one of the following:
      - Temporary (302)
      - Permanent (301)
   e. For your reference, enter a brief description of the rewrite.



Custom URL Rewrite

6. Before saving the redirect, review the following:
   - The Request Path contains the URL key or path of the original "redirect from" page.
   - The Target Path contains the URL of the "redirect to" page.
7. When complete, tap **Save**.

   The new rewrite appears in the grid at the top of the list.



Saved URL Rewrite

Step 3: Test the Result

1. Go to the home page of your store.
2. Do one of the following:
   - Navigate to the original "redirect from" page.
   - In the address bar of the browser, enter the name of the original "redirect from" page immediately after the store URL. Then, press **Enter**.

The new target page appears instead of the original page request.

Field Descriptions

FIELD	DESCRIPTION	
Create URL Rewrite	Indicates the type of rewrite. The type cannot be changed after the rewrite is created. Options: Custom For category For product For CMS page	
Request Path	The path to the product, category, or CMS page that is to be redirected. Depending on your configuration, the Request Path might include the .html or .htm suffix. The Request Path must be unique, and cannot be in use by another redirect. If you receive an error that the Request Path already exists, delete the existing redirect, and try again.	
Target Path	The path or URL that is the destination of the redirect.	
Redirect	Determines the type of redirect. Options :	
	No	No redirect is specified. Many operations create redirect requests of this type. For example, every time you add products to a category, a redirect of the "No" type is created each store view.
	Temporary (302)	Indicates to search engines that the rewrite is for a limited time. Search engines generally do not retain page rank information for temporary rewrites.
	Permanent (301)	Indicates to search engines that the rewrite is permanent. Search engines generally retain page rank information for permanent rewrites.
Description	Describes the purpose of the rewrite for internal reference.	

CHAPTER 42:

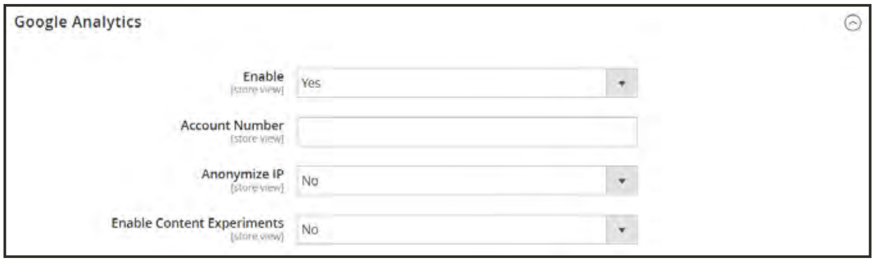
Google Tools

Your store configuration is integrated with the following Google tools to help optimize your content, analyze your traffic, and connect your catalog to shopping aggregators and marketplaces.

- Google Analytics
- Google Content Experiments
- Google Tag Manager
- Google AdWords

Google Analytics

Google Universal Analytics gives you the ability to define additional custom dimensions and metrics for tracking, with support for offline and mobile app interactions, and access to ongoing updates.



Google Analytics

Process Overview:

Step 1: Sign Up for Google Universal Analytics

Step 2: Complete the Magento Configuration

Step 1: Sign Up for Google Universal Analytics

Visit the Google website, and sign up for a Google Universal Analytics account.

Step 2: Complete the Magento Configuration

1. Return to your store, and log in to the Admin. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Google API**.
3. Expand the **Google Analytics** section. Then, do the following:
   a. Set **Enable** to "Yes."
   b. Enter your Google Analytics **Account Number**.
   c. If you want to conduct A/B testing and other performance tests on your content, set **Content Experiments** to "Yes."
4. When complete, tap **Save Config**.

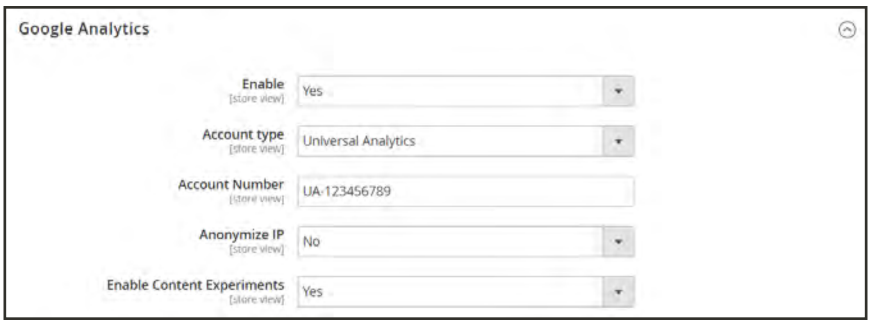
Google Content Experiments

The following example shows how to set up an A/B test of products, categories, or content pages using Google Analytics Content Experiments. We recommend that you keep two browser tabs open while working through the instructions, because you will need to bounce back and forth between the Magento Admin and your Google Analytics account.

> Google Content Experiments has been deprecated, and will eventually be replaced by Google Optimize.

Step 1: Enable Content Experiments (Magento)

1. Log in to the Admin of your Magento installation.
2. Follow the instructions to enable Google Analytics with Content Experiments in the Magento configuration.



Enable Content Experiments

Step 2: Set Up the Variations (Magento)

Create multiple variations of the same product, cateogory, or page.

- Each variation must have a unique URL key.
- Each variation must have the same store view selected.

You can create up to ten variations of each entity that you want to test. For products, use Save & Duplicate to save time.

Step 3: Set Up the Experiment (Google)

> You must have the appropriate permissions to the Google account to create an experiment.

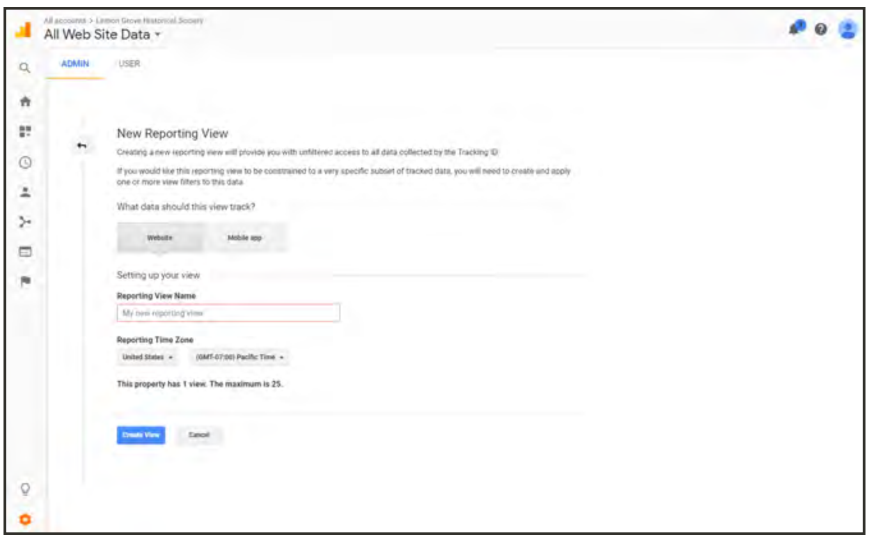
1. Open another browser tab, and log into your Google Analytics account. If necessary, navigate to the **Account** and **Property**.
2. In the sidebar on the left, choose **Admin**. Then, do one of the following:

Choose an Existing View

In the header of the **View** column, click the **down arrow**, and choose the view that is to provide the data for the experiment.

Create a New Reporting View

1. In the header of the **View** column, tap **Create View**. Then, do the following:
   a. Identify the experiment location as one of the following:
      - Website
      - Mobile app
   b. Enter a descriptive **Reporting View Name**.
   c. Specify the **Reporting Time Zone**.
2. When complete, tap **Create View**. Then, click the back arrow to return to the previous page.



New Reporting View

3. In the panel on the left under **Reports**, choose **Behavior > Experiments**.
4. Tap **Create experiment**. Then, do the following:
   a. Specify the percentage of traffic to redirect.
   b. Specify the **Original Page URL** and the URLs of each **page variation** that you want to test.
   c. Complete the other options. If you need help see: .Configure & Modify Experiments.
5. When the experiment is set up, tap **Manually Insert the Code**. Then, copy the code snippet.

Step 4: Paste Code Snippet (Magento)

1. Return to the Admin of your Magento installation. Then, open the original version of the product, category, or page in edit mode.

2. Expand the **View Optimization** section for the product, category, or page. Then, paste the code snippet that you copied from Google Analytics into the **Experiment Code** text box.

> Do not paste the code snippet into any of the variations.

Product View Optimization

3. When complete, tap **Save**.

Step 5: Review and Start the Experiment (Google)

1. Return to your Google Analytics account.

2. Review the experiment settings.

3. If ready to begin, tap **Start Experiment**. Otherwise, tap **Save for Later**.

Google Tag Manager

Google Tag Manager helps you manage the many tags, or snippets of code, that are related to your marketing campaign events. Google Tag Manager gives you the ability to add tracking tags to your site to measure the audience, or to personalize, retarget, or conduct search engine marketing initiatives.

Google Tag Manager directly transfers data and events to Google Analytics, Enhanced Ecommerce and other third-party analytics solutions, to produce a clear picture of how well your site, products, and promotions are performing.

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: Configure Your Google Analytics Account

Step 2: Configure Your Google Tag Manager Account

Step 3:Configure Your Store

Step 1: Configure Your Google Analytics Account

1. Sign in to your Google Analytics account.
2. To enable **Internal Site Search Tracking**, do the following:
   a. Navigate to **Select View** > **View Settings**.
   b. Turn **Site Search Tracking** On.
   c. Set **Query** parameter to “q”.
   d. When complete, **Save** the settings.
3. To enable display features, do the following:
   a. Choose **Property Settings**.
   b. Under Advertising Features, set **Enable Demographics and Interest Reports** to “On”.
   c. **Save** the settings.
4. To enable Ecommerce Tracking, do the following:
   a. Navigate to **Select View** > **Ecommerce Settings**.
   b. Set **Enable Ecommerce** to “On”.
   c. Set **Enable Enhanced Ecommerce Reporting** to “On”.
   d. **Save** the settings.
5. Reload the page to verify that all the settings remain “On”.

If not all settings are "On," repeat the previous steps, save, and reload the page. Repeat this process until all settings are set to "On".

Step 2: Configure Your Google Tag Manager Account

The following instructions show how to configure a new container with the basic settings. A sample Composer configuration (.json) file is used to simplify the process.

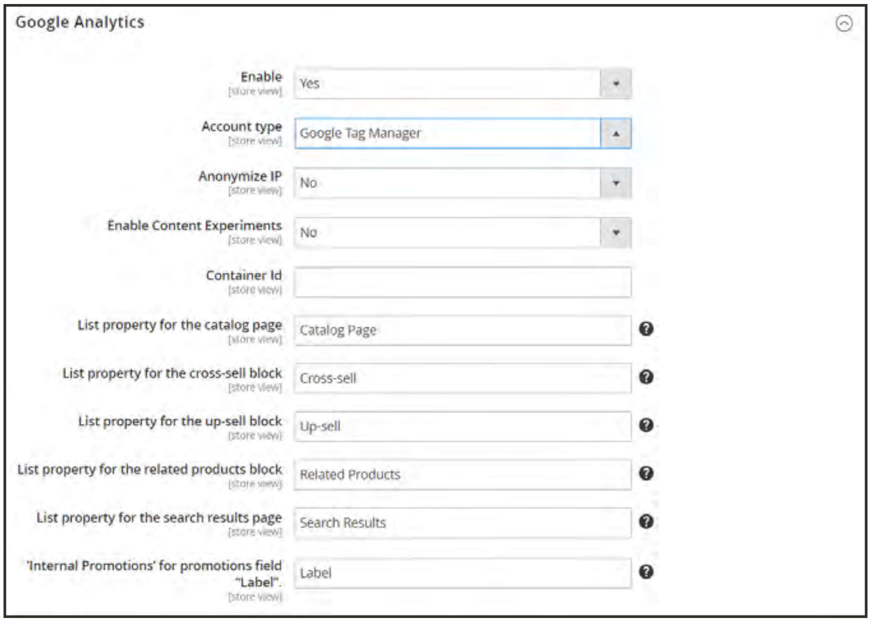
1. Right-click this link: GMT_M2_Config_json.txt. Choose **Save link as** to download the sample text file. Then, do the following:
   a. Open the file in an editor, and save as GMT_M2_Config.json.
   b. Zip the file to produce an archive called GMT_M2_Config.zip.

   The zipped file will be uploaded directly to Google Tag Manager, and does not need to be copied to your server.
2. Create a new container. For this example, we recommend that you create a new container, rather than modify an existing container.
3. Navigate to **Admin** > **Container** > **Import Container**. Then, verify the following settings:
   - The **Overwrite** option should be selected for the new container.
   - The **Merge** option should be selected is you are using an existing container.
4. To edit the **Google Analytics ID** that is referenced in variables, do the following:
   a. Navigate to **Variables** > **User-Defined Variables**.
   b. Choose **Google Analytics**. Then, update the placeholder (UA-xxxxxx-x) with your own **GA ID**.
5. Follow Google's instructions to add tags, triggers, and variables to the new container.

   If you have settings in another container that you want to use, they can be moved to the new container.
6. Follow Google's instructions to publish the new container.

Step 3: Configure Your Store

1. Log in to the Admin of your Magento store.
2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
3. In the panel on the left under **Sales**, choose **Google API**.
4. Expand the **Google Analytics** section, and do the following:



Google API - Google Tag Manager

a. Set **Enable** to "Yes."

b. Set **Account type** to "Google Tag Manager."

c. In the **Container ID** field, enter your GTM ID. (GTM-xxxxxx)

d. If you are also using Google Analytics to content experiments, set **Enable Content Experiments** to "Yes."

e. Leave the remaining fields as they are.

5. When complete, tap **Save Config** .

6. Test your Google Tag Manager settings to verify that everything works correctly.

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

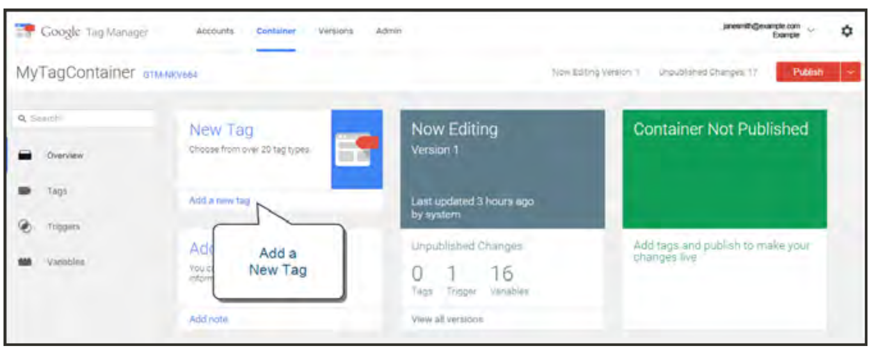
Creating a Tag to Track Conversions

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: Create a Rule
> Step 3: Preview and Publish

Step 1: Create a Tag

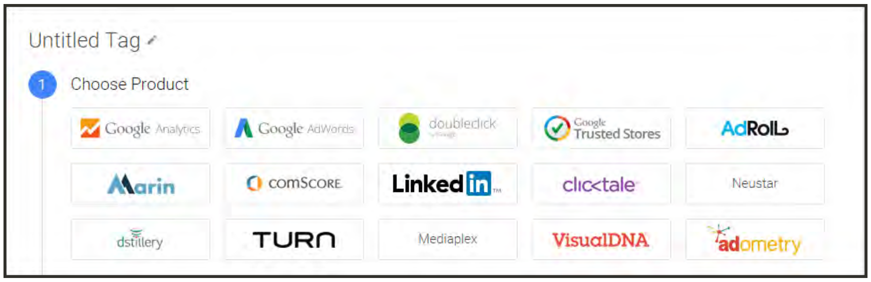
1. Log in to your Google Tag Manager account. Then, click the link for the container that you created for your store.
2. In the **New Tag** box, tap **Add a new tag**.



Google Tag Manager

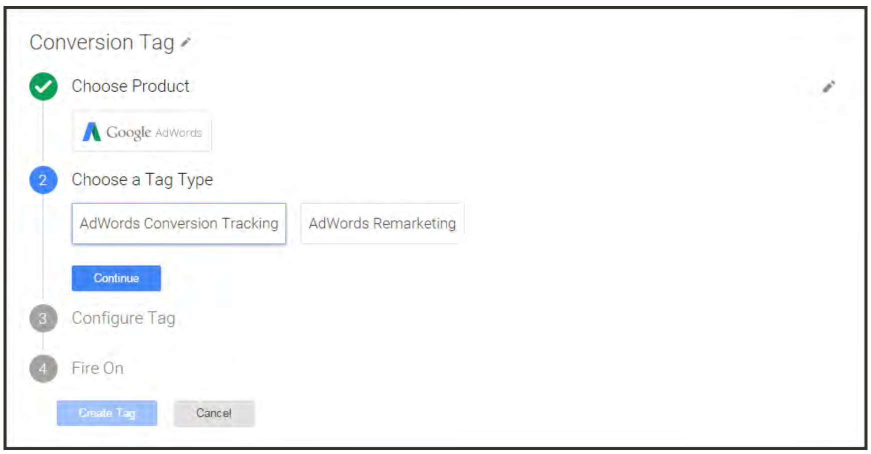
3. You will need the following information from your AdWords account:
   - Conversion ID
   - Conversion Label

   If you need help, visit Google's support site.
4. From the Google Tag Manager dashboard, tap **Google AdWords**. Then, do the following:
   a. Tap the title placeholder, and enter a name for the new tag.
   b. Under **Choose Product**, select **Google Adwords**.

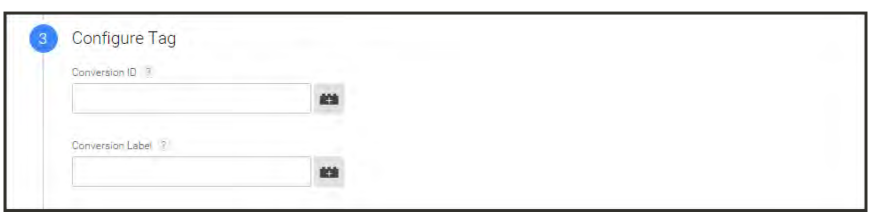


Choose Product

c. Under **Choose a Tag Type**, select **AdWords Conversion Tracking**. Then, tap **Continue**.



5. Enter the **Conversion ID** and **Conversion Label** from your AdWords account. Then, tap **Continue**.



Configure Tag

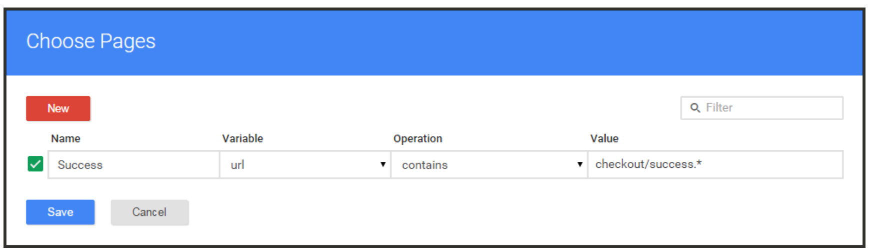
Step 2: Create a Rule

Continuing from the Google Tag Manager dashboard, the next step is to create a rule that fires the tag on the conversion page.

1. Under **Fire On**, tap **Some Pages**.

2. In the Choose Pages section, complete the following settings:

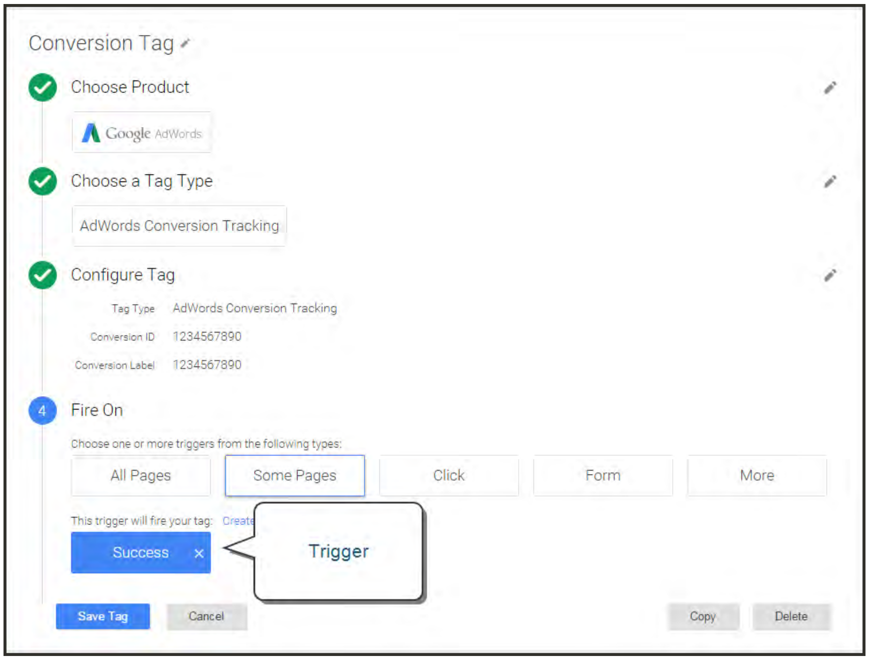
Name:	Enter a name for the page description.
Variable:	url
Operation:	`matches RegEx` To learn more, see: What is "matches regex" for? in Tag Manager Help
Value:	`checkout/success.*`



Conversion Page Location

3. Mark the green checkbox, and tap **Save**. The trigger that you set up appears as a blue button in the Fire On section.

4. When complete, tap **Save Tag**.



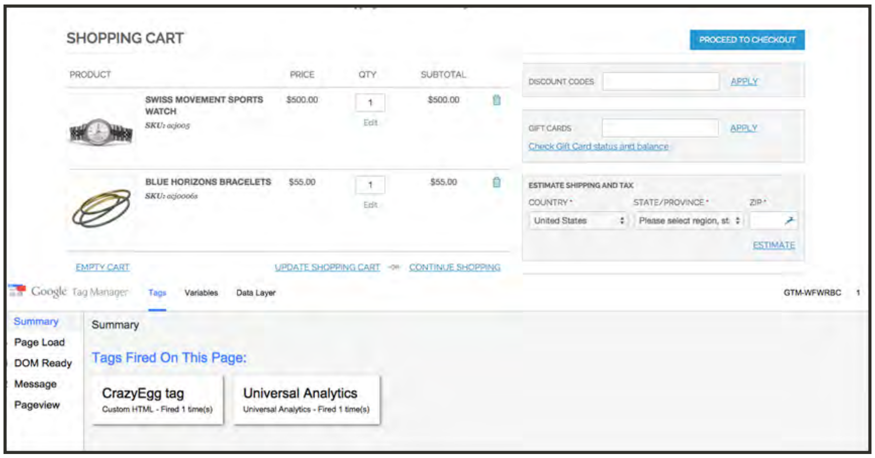
Step 3: Preview and Publish

The next step in the process is to preview the tag. Each time the tag is previewed, a snapshot of the version is saved. When you are satisfied with the results, go to the version that you want to use, and tap **Publish.**

Enhanced Ecommerce

Enhanced Ecommerce is a plugin for Google Universal Analytics that gives you insight into the shopping and purchasing behavior of your customers. You can use Enhanced Ecommerce to produce reports about key customer activities, such as when customers add items the cart, begin the checkout process, or complete a purchase. You can also identify and analyze patterns of shoppers who abandon their carts without making a purchase.

The following instructions show how to configure Google Tag Manager with Universal Analytics to produce Enhanced Ecommerce data and reports.



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

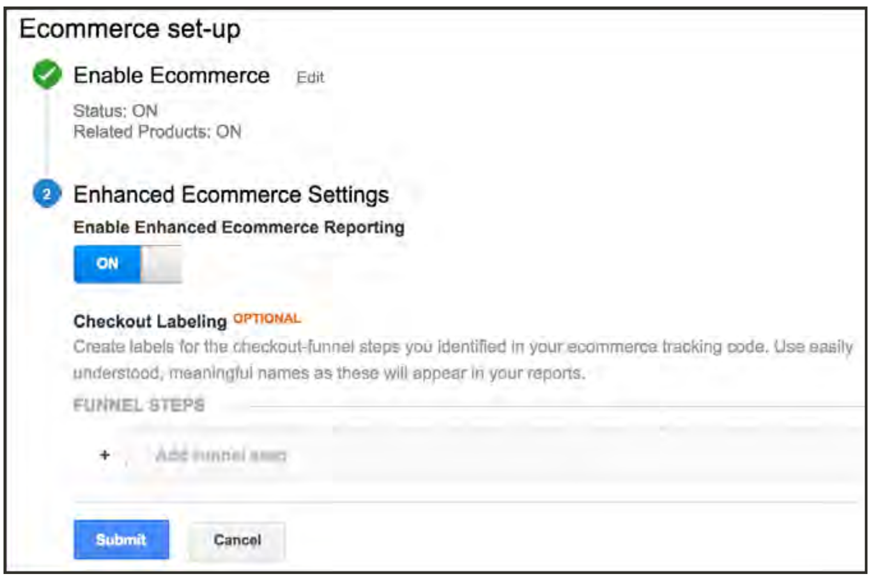
1. Sign in to your Google Universal Analytics account.

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:

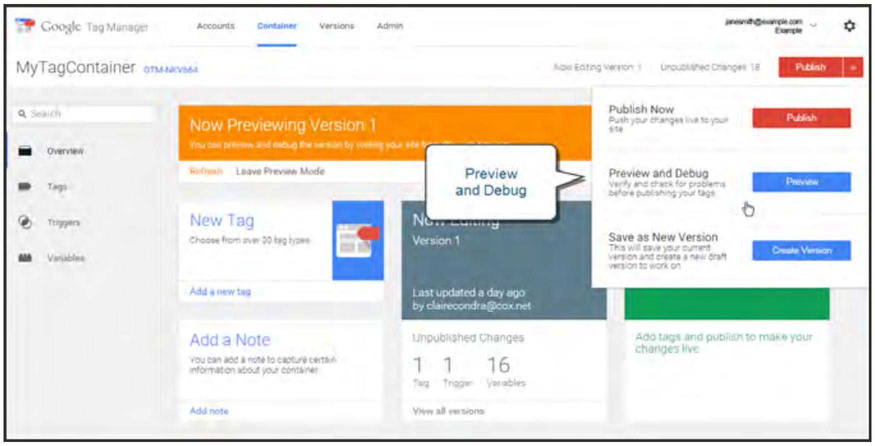
Remove from Cart Configuration

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**.

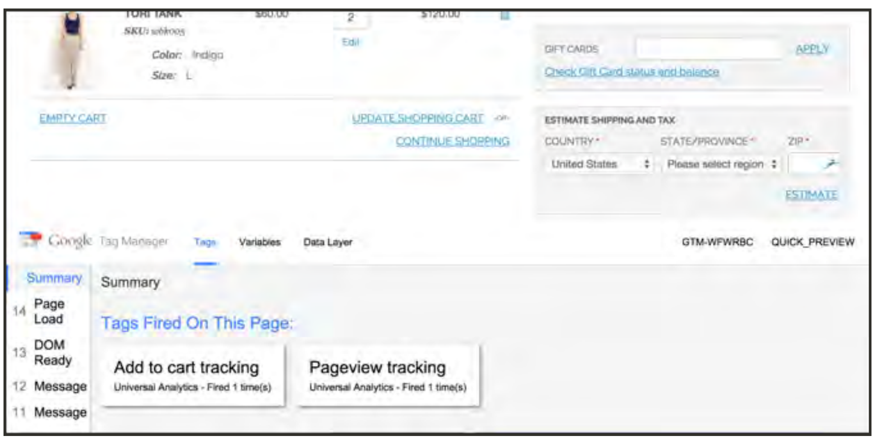
Troubleshooting Tools

Both Google Tag Manager and Universal Analytics have debug modes with a variety of tools that you can use to troubleshoot your integration.



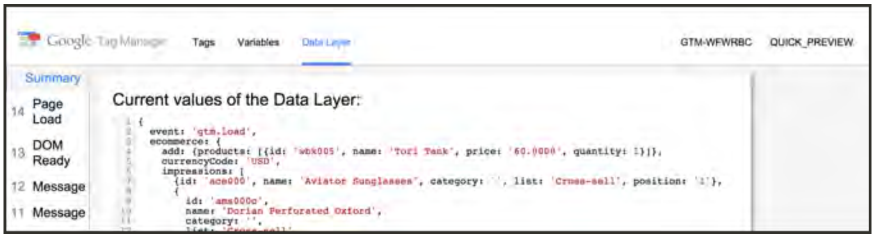
Preview and Debug

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

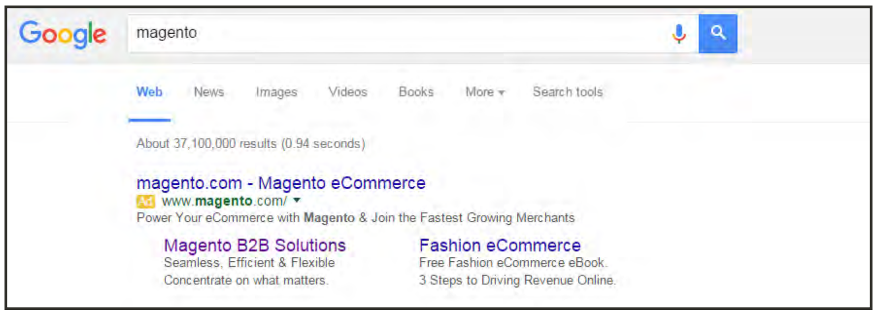
You also can use the JavaScript console in Chrome to see the output of events as it is sent to Google.

Chrome JavaScript Console

Google AdWords

Google AdWords is a service that you can use to place ads in Google Search results and on the pages of companies in the Google Display Network. The AdWords dashboard includes tools to manage your campaigns, track response, and measure results.

Conversion tracking shows how many ad clicks lead to a sale or other valuable action. The "Success" page that appears to your customer after an order has been submitted is used to track conversions because it appears only after a sale. After completing the Google AdWords configuration for your store, there is no need to copy the conversion tracking script to the "Success" page, because Magento already has the necessary information. To learn more, see Google AdWorlds Help.



Magento Ad in Google Search Results

Step 1: Create a Google AdWords Campaign

1. Visit Google AdWords, and sign up for an account.
2. Follow the instructions to create a campaign.
3. To set up conversion tracking for your campaign, do the following:
   a. On the **Tools** tab of your AdWords dashboard, choose **Conversions**. Then, tap **Conversion**.
   b. When prompted for the conversion source, choose **Website**
   c. Enter a name for the conversion action that you want to track. Then, tap **Done**.
   d. Click **Value**. Then if applicable, assign a value to the conversion. For example,
      - If you make $5 on each sale, choose "Each time it happens," and assign a value of $5.
      - If the value of each sale varies, leave the value blank.

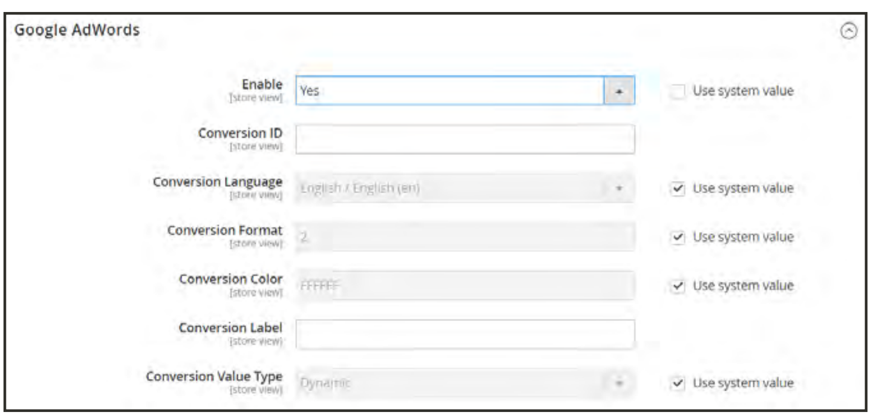
      Then, tap **Done**.
   e. Tap **Conversion windows**, and complete the settings to determine how long the conversions are to be tracked, the reporting category, and attribution model.
4. When complete, tap **Save and Continue**.

Step 2: Get Your Conversion Tag

1. Under **Install your tag**, choose to count conversions on **Page load**.
2. As an option, you can add the **Google Site Stats** notification to the conversion page. The notification appears in the lower corner with a link to Google's security standards and cookie usage.
3. To choose how you want to manage the your AdWords tag, do one of the following:
   - If you plan to add the script to your store yourself, choose **Save instructions and tag**.
   - If you plan to have someone else add the script to your store , choose **Email instructions and tag**.
4. When complete, tap **Done**.

Step 3: Configure Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If configuring Google AdWords tor a specific store view, do the following:
   a. In the upper-left corner, choose the **Store View** that is to be configured.
   b. When prompted to confirm scope switching, tap **OK**.
3. In the panel on the left, under **Sales**, choose **Google API**. Then, expand the **Google AdWords** section and do the following:
   a. If necessary, clear the **Use Website** checkbox for each setting to be changed.
   b. Set **Enable** to "Yes.":
   c. Enter the **Conversion ID** from your Google AdWords script.



Google AdWords

4. To format the Google Sites Stat notification, do the following:

a. Set **Conversion Language** to the language that is identified in your Google AdWords script.

b. Enter the **Conversion Format** to be used for the Google Sites Stat notification on the conversion page.

1	Displays a one-line notification with a link to more information about Google tracking.
2	Displays a two-line notification with a link to more information about Google tracking.
3	Displays no customer notification.

c. Enter the hexadecimal code for the **Conversion Color** that you want to use for the Google Site Stats notification label.

d. Enter the encrypted text for the **Conversion Label** that appears on the Google Sites Stat notification.

For example: MlEYCOKBnGoQz6CZoAM

Sample Google AdWords Tag Code

```
<!-- Google Code for Back to School Sale Conversion Page -->

<script type="text/javascript">

/* <![CDATA[ */
var google_conversion_id = 999999999;

var google_conversion_language = "en";

var google_conversion_format = "3";

var google_conversion_color = "ffffff";

var google_conversion_label = "MlEYCOKBnGoQz6CZoAM";

var google_remarketing_only = false;

/* ]]> */
</script>

<script type="text/javascript"
src="//www.googleadservices.com/pagead/conversion.js">

</script>

<noscript>

<div style="display:inline;">
<img height="1" width="1" style="border-style:none;" alt=""
src="//www.googleadservices.com/pagead/conversion/872829007/?label=MlEYCOK
```

```
BnGoQz6CZoAM&amp;guid=ON&amp;script=0"/>
</div>
</noscript>
```

5. Set **Conversion Value Type** to one of the following:

Dynamic	Determines that a conversion has occurred based on the dynamic Order Amount value.
Constant	Determines that a conversion has occurred based on a specific value entered.

For a Constant conversion value type, enter a specific **Value** for the Order Amount to qualify as a conversion.

6. When complete, tap **Save Config**.

Step 4: Verify the Configuration

Within a few hours, the tracking status in your Google AdWords dashboard changes from "Unverified" to "No recent conversions" or "Recording conversions." When someone clicks your ad and makes a purchase, the conversion appears on the Conversion Actions page of your dashboard and campaign report.

CONTENT

Contents

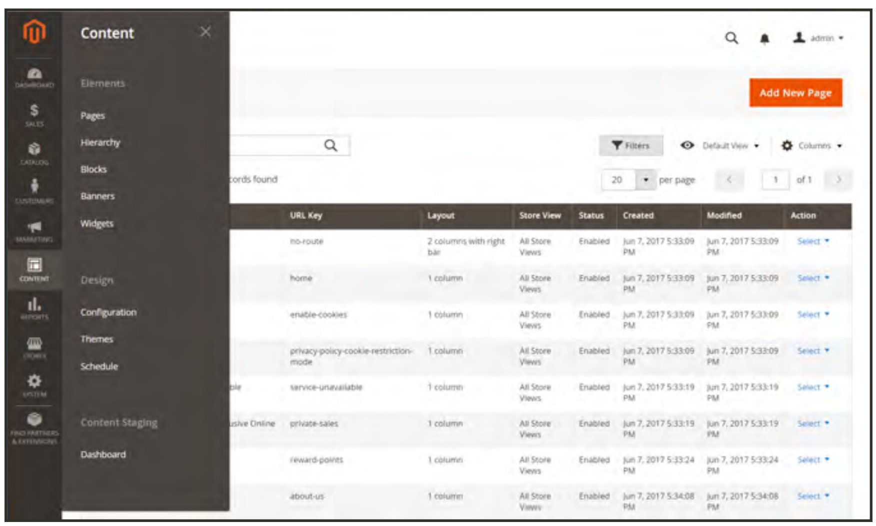
In this section of the guide, you'll learn how to create content and manage the presentation of your store.

CHAPTER 43:

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. Keep in mind that with quality content, sometimes less is more.



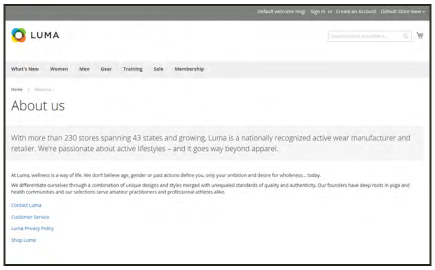
Content Menu

To display the Content menu:

On the Admin sidebar, tap **Content**.

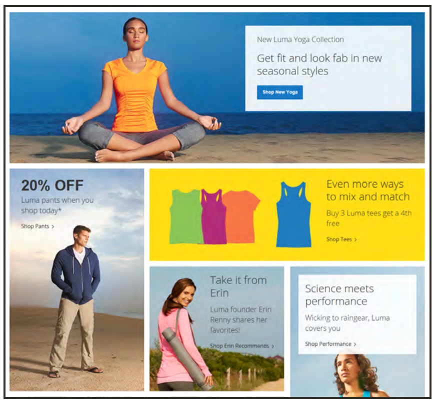
[1] The art of promoting products or services by providing valuable information at no charge.

Menu Options



Pages

Create pages with text, images, blocks, variables, and widgets, that can be incorporated into the navigation of your store, and linked to other pages. Then, organize your pages into a hierarchy with navigation.

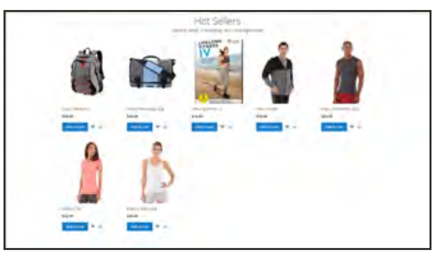


Blocks

Create blocks of content without writing any code. Blocks can contain text, images, and even video, and can be assigned to any part of the page layout.

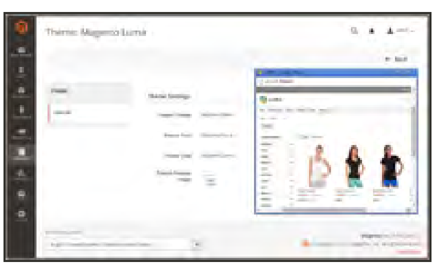
Banners

Create banners that are triggered by promotions and that appear only to customers in specific, targeted segments.



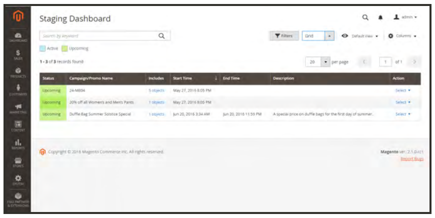
Widgets

Display dynamic data and add blocks, links, and interactive elements most anywhere in your store.



Design

Learn to manage the visual presentation of your store, apply themes, and schedule design changes.



Staging

Content Staging gives your business team the ability to easily create, preview, and schedule a wide range of content updates directly from the Admin of your store.

Content Elements

Content Elements

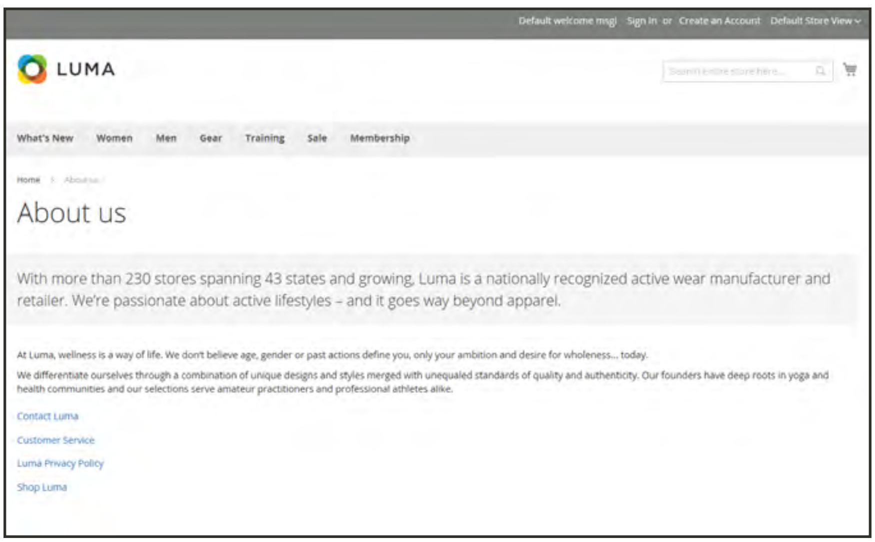
In this section of the guide, you'll learn how to create and manage content pages and blocks, and use variables and widgets to add dynamic content.

CHAPTER 44:

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.

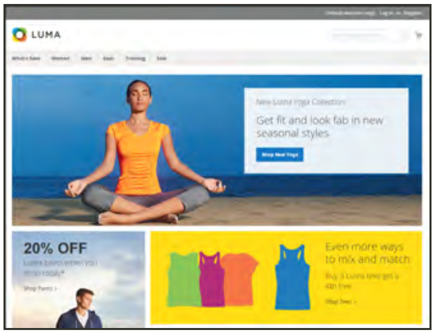


About Us

[1]Content that has a long shelf life.

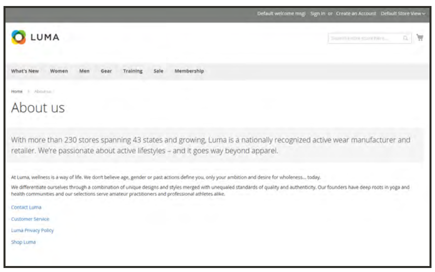
Core Content

The Magento demo store has examples of core content pages to help you get started. All of the pages can be modified to meet your needs. Take a look at the following pages in your store, to make sure that the content conveys your message, voice, and brand.



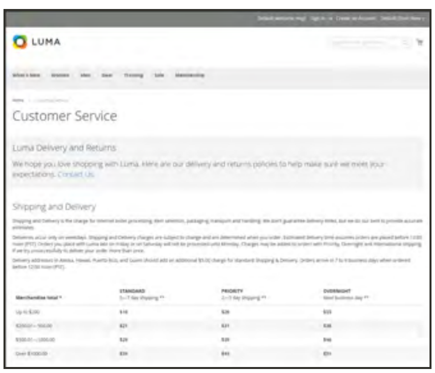
Home

The demo “Home” page includes a banner, an image carousel, several static blocks with links, and a list of new products.



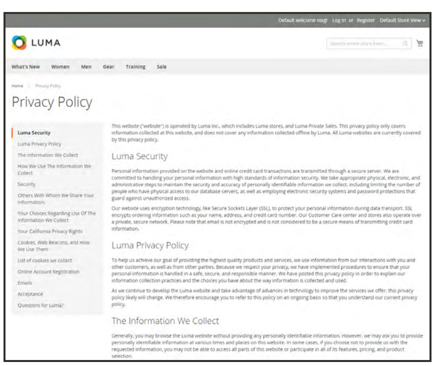
About Us

The “About Us” page is linked from the footer of your store. You can include images, video, links to press releases and announcements. The sample page has an image on the right, and one of a decorative sort to indicate the end of the page.



Customer Service

The “Customer Service” page is another node in the page hierarchy. The two headers on the page have content that only becomes visible when the header is clicked.

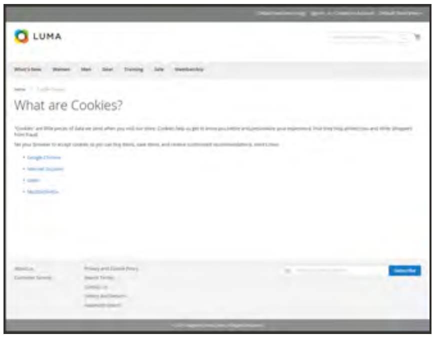


Privacy Policy

Your store’s “Privacy Policy” page should be updated with your own information. As a best practice, your privacy policy should explain to your customers the type of information that your company collects and how it is used.

404 Not Found

The “404 Page Not Found” page is named for the response code that is returned when a page cannot be found. URL redirects reduce the number of times that this page appears. However, for those times when it is necessary, you might as well take advantage of the opportunity to offer some links to products that the customer might find interesting.



Enable Cookies

The “Enable Cookies” page appears when visitors to your site do not have cookies enabled in their browsers. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.

Service Unavailable

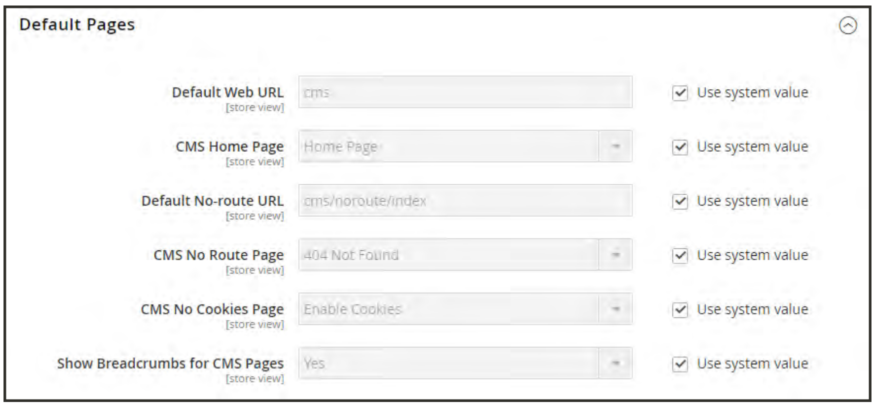
The “503 Service Unavailable" page is named for the response code that is returned when the server is unavailable.

Default Pages

The Default Pages configuration determines the landing page that is associated with the base URL, and the corresponding home page. It also determines which page appears when a "Page Not Found" error occurs, and if a breadcrumb trail appears at the top of each page.

To configure the default pages:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand the **Default Pages** section. Then, do the following:



Default Pages

   a. In the **Default Web URL** field, enter the relative path to the folder in the Magento installation that contains the landing page. The default value is "cms."

   > For a specific store view, clear the **Use Default** checkbox next to the Default Web URL field, and any other default fields to be changed.

   b. Set **CMS Home Page** to the CMS page to be used as the home page.

   c. In the **Default No-route URL** field, enter the relative path to the folder in the Magento installation where the page is redirected when a "404 Page Not Found" error occurs. The default value is "cms/index/noRoute."

   d. Set **CMS No Route Page** to the CMS page that appears when a "404 Page Not Found" error occurs.

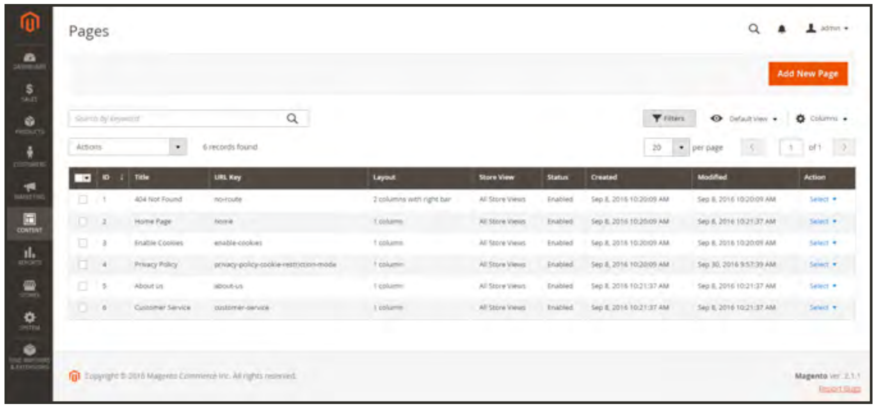
   e. Set **CMS No Cookies Page** to the CMS page that appears when cookies are disabled in the browser.

   f. If you want a breadcrumb trail to appear at the top of all CMS pages, set **Show Breadcrumbs for CMS Pages** to "Yes."

4. When complete, tap **Save Config**.

Workspace Controls

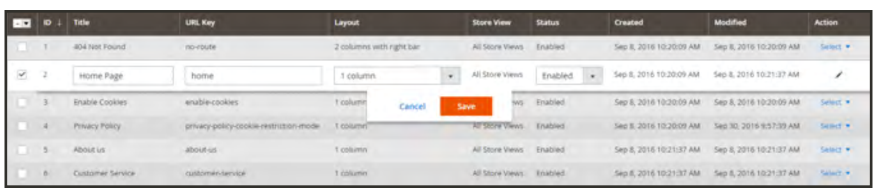
The page workspace includes tools to help you quickly find the pages you need, and commands to perform routine maintenance on individual or multiple pages. You can also quickly update page properties from the grid.



Pages Grid

To quickly update page properties:

1. Click any row in the grid. To select multiple records, mark the checkbox of each row that you want to update.



Update Page Properties

2. Update any of the following properties:
   - Title
   - URL Key
   - Status
   - Layout
3. When complete, tap **Save**.

Workspace Controls

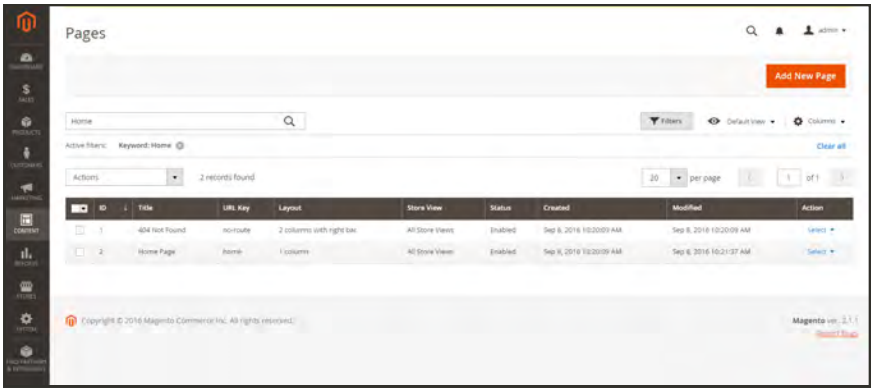
CONTROL	DESCRIPTION
Add New Page	Adds a new page.
Search	Initiates a catalog search based on the current filters.
Actions	Lists all actions that can be applied to selected items in the list. To apply an action to a page, or to multiple pages, mark the checkbox in the first column of each record that is subject to the action. Options: Delete Disable Enable Edit
Select	The control in the header of the first column can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that you want to select. Options: Select All / Deselect All
Save Edits	Applies the current action to selected records.
Edit	Opens the record in edit mode. You can accomplish the same thing by clicking anywhere on the row.

Columns

COLUMN	DESCRIPTION
Select	The checkbox in the first column is used to select multiple records: Options: Select All Deselect All
ID	The ID is an incrementing number that is assigned to each page.
Title	The page title appears at the top of each page.
URL Key	The URL key is similar to a file name, and identifies the page in the URL.
Layout	Determines if the page appears with sidebars to the right or left of the main content area. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Store View	Can be used to associate the page with a specific store view.
Status	Indicates if the page is currently online or offline. Options: Enabled / Disabled
Created	The date the page was created.
Modified	The data the page was last modified.
Action	The actions that can be applied to an individual record include: Edit — Opens the page in edit mode. Delete — Deletes the page. View — 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 by keyword. For a more advanced search, you can filter the search by multiple parameters.



Keyword Search Results

To search by keyword:

1. Enter a search term into the page search box.
2. Tap **Search** (🔍) to display the results. The results include all pages that contain the keyword.

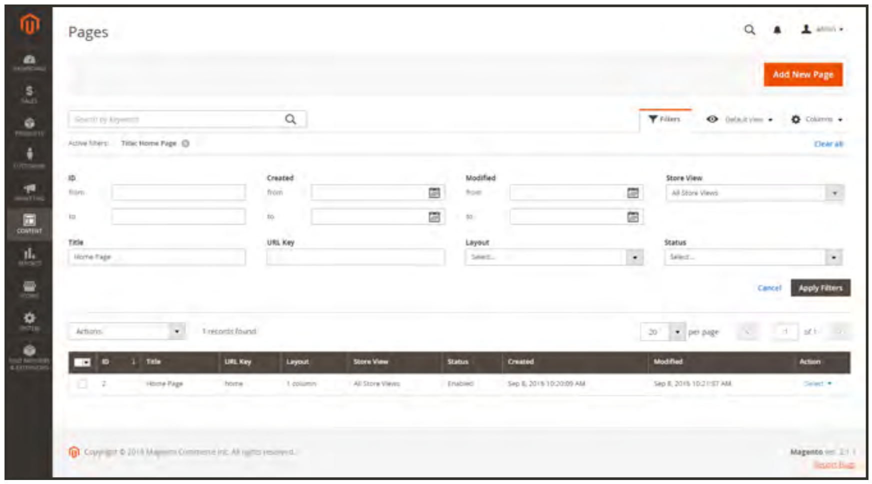
To filter search:

1. If necessary, click **Clear All** to clear the previous search criteria.

2. Tap the **Filters** (▼) tab to display the selection of search filters.

3. Complete as many of the filters as necessary to describe the page(s) that you want to find.

4. Tap **Apply Filters** to display the results.



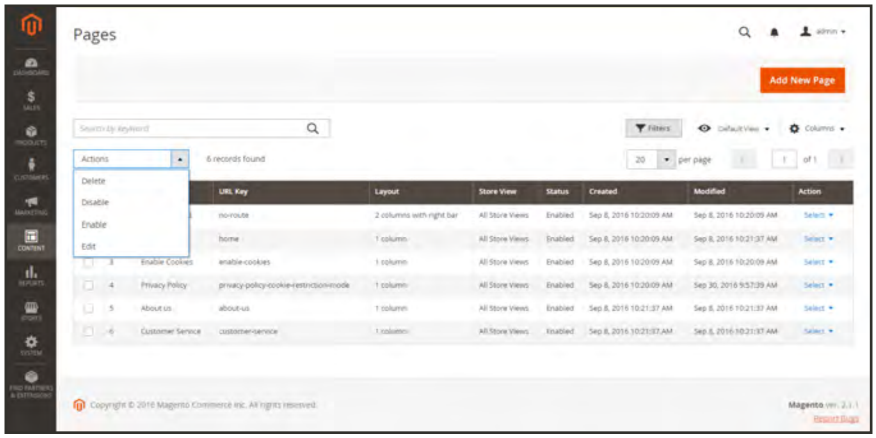
Filtered Search

Search Filters

FILTER	DESCRIPTION
ID	Filter the search by page record ID.
Title	Filter the search based on the page title.
URL Key	Filter the search by the URL Key.
Created	Filter the search by the date the page was created.
Modified	Filter the search based on the date the page was last modified.
Store View	Filter the search based on store view. Options: (All available Store Views)
Layout	Filter the search based on page layout. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Status	Filter the search on the page status. Options: Disables / Published
Apply Filters	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

Page Actions

Pages can be edited, disabled, enabled, and deleted. To apply an action to an individual page, mark the checkbox in the first column. To select or deselect all pages, use the mass actions control at the top of the column.

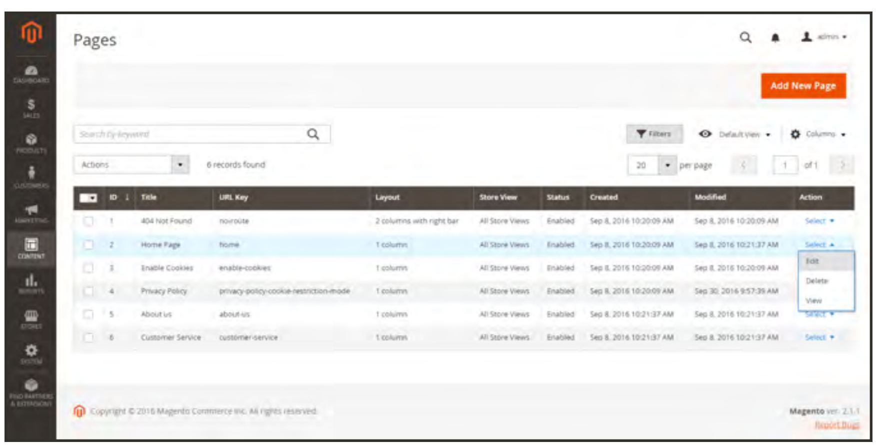


Page Actions

To apply an action:

The Action column on the far right can be used to apply any of the following actions to the individual page:

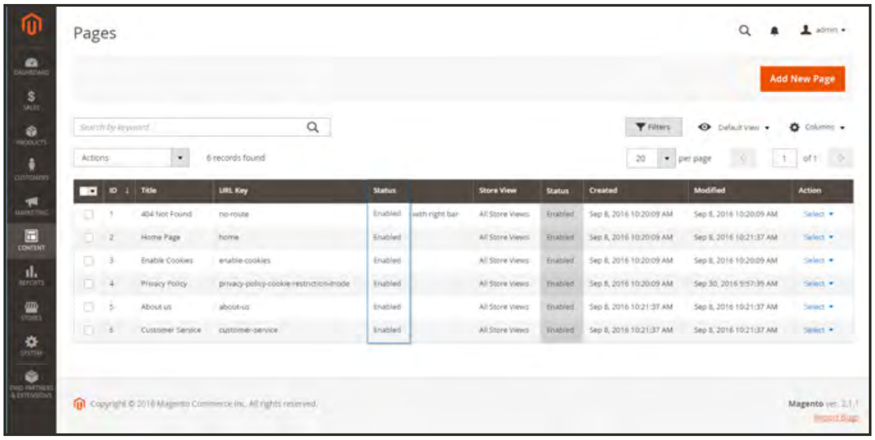
- Edit
- Delete
- View



Single Page Actions

Page Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. To keep the new column arrangement, you can save it as a view.



Moving a Column

To change the selection of columns:

In the upper-right corner, tap the **Columns** (⚙) control. Then, do the following:

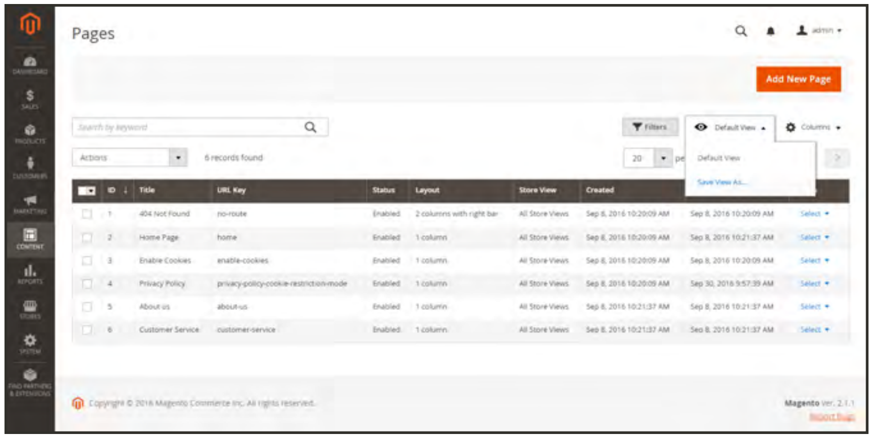
- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

To save a view:

1. Tap the **View** (👁) control. Then, tap **Save Current View**.



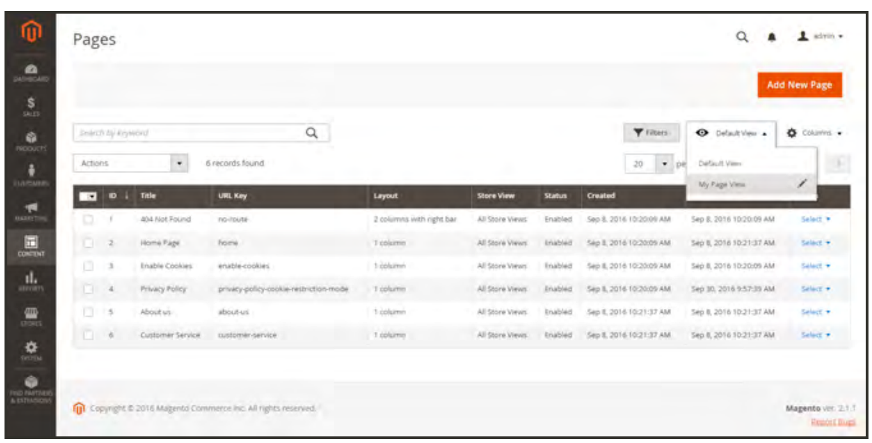
Save Current View

2. Enter a **name** for the view. Then, click the **arrow** (➜) to save all changes. The name of the view now appears as the current view.

To change the view:

Tap the **View** (👁) control. Then, do one of the following:

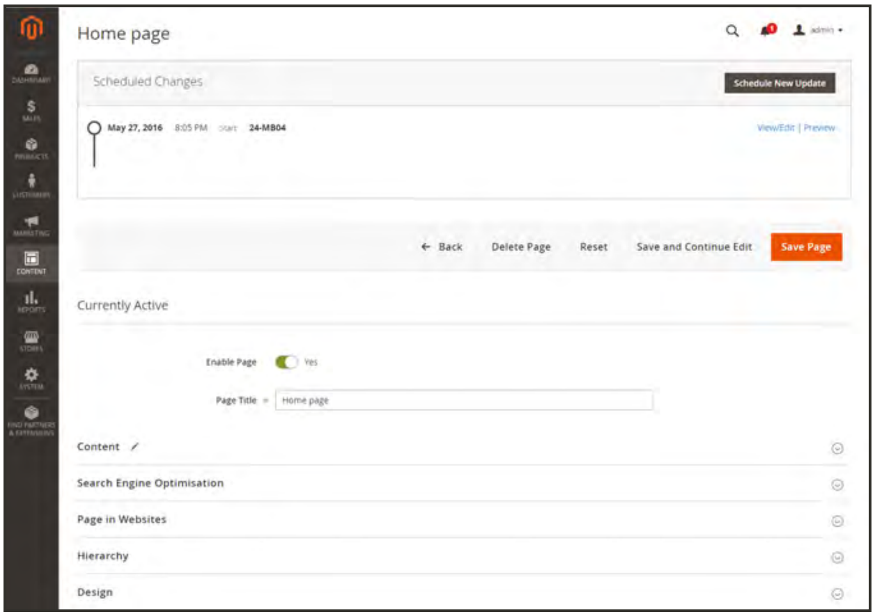
- Choose the view that you want to use.
- To change the name of a view, tap the **Edit** (✎) icon. Then, update the name.



Choose a View

Scheduled Changes

Page changes can be applied on schedule, and grouped with other content changes. You can create a new campaign based on scheduled changes to a page, or apply the changes to an existing campaign. To learn more, see: Content Staging.

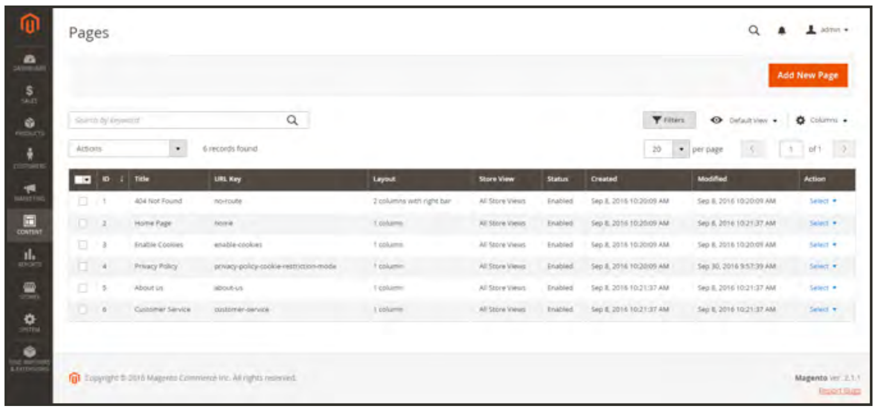


Scheduled Changes

Adding a New Page

The process of adding a new content page to your store is essentially the same for any type of page you might want to create. You can include text, images, blocks of content, variables, and widgets. Most content pages are designed to be read by search engines first, and by people second. Keep the needs of each of these two very different audiences in mind when choosing the page title, and URL, and when composing the meta data, and content.

The following instructions walk you through each step to create a basic page. Some advanced features are skipped over, but are covered in other topics.



Pages

Process Overview:

Step 1: Add a New Page

Step 2: Complete the Content

Step 3: Complete the SEO Information

Step 4: Define the Scope

Step 5: Make Design Changes (Optional)

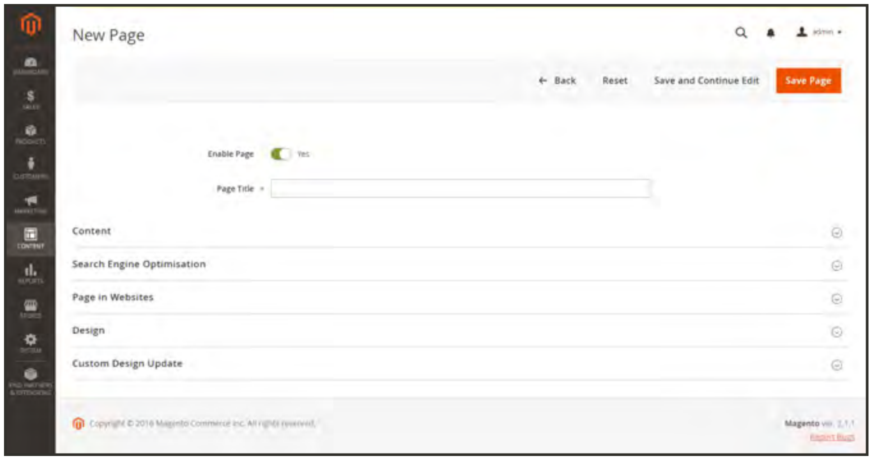
Step 6: Preview the Page

Step 7: Publish the Page

Step 1: Add a New Page

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.

2. Tap **Add New Page**.



New Page

3. On the new page, do the following:

   a. By default, a new page is published when the record is saved. If you do not want to publish the page immediately, set **Enable Page** to "No."

   b. Enter the **Page Title**. The Page Title is the name that appears in the breadcrumb trail navigation.

4. To schedule design changes, expand the **Custom Design Update** section. Then, do the following:

   a. Use the calendar ( ) to choose the **From** and **To** dates when the design change is to be in effect.

   b. If applicable, set **New Theme** to a different theme that is to be used for the page.

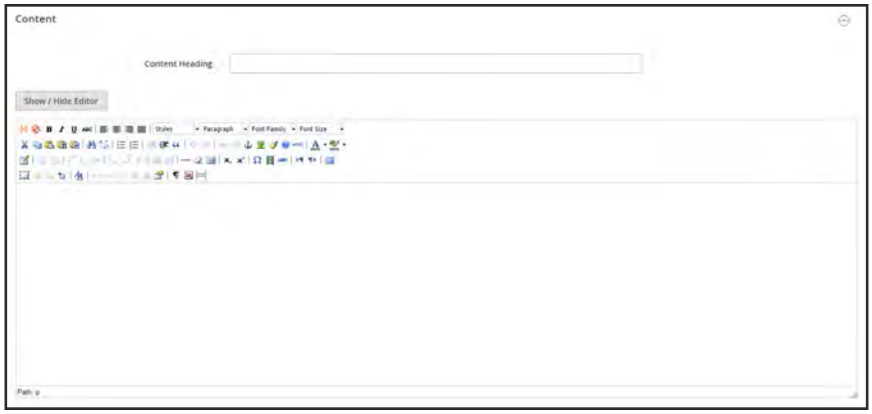
   c. If applicable, set **New Layout** to one of the following:

      - 1 column
      - 2 columns with left bar
      - 2 columns with right bar
      - 3 columns
      - Empty

Custom Design Update

Step 2: Complete the Content

1. Expand the **Content** section.



Content

2. In the **Content Heading** box, type the heading that you want to appear at the top of the page.

3. By default, the editor opens in WYSIWYG mode with the toolbar at the top.

   - If you prefer to work directly with the HTML code, tap **Show / Hide Editor**.

4. Complete the content and format the text as needed. You can add images, variables, and widgets as needed. To learn more, see: Using the Editor.

5. Tap **Save and Continue Edit**.

Step 3: Complete the SEO Information

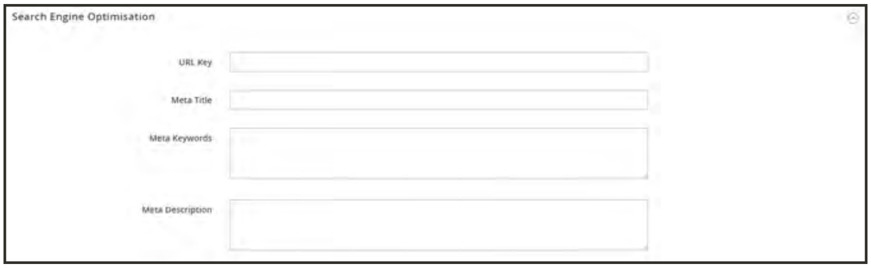
1. Expand the **Search Engine Optimization** section. Then, do the following:

   a. When the page was saved, a default URL key was created that is based on the Content Heading. You can accept the default, or enter another **URL Key** that consists of all lowercase characters, with hyphens instead of spaces.

   b. Enter a **Meta Title** for the page. The Meta Title should be less than seventy characters in length, and appears in the browser title bar and tab.

   c. Enter your choice of high-value **Meta Keywords** that search engines can use to index the page. Separate multiple words with a comma. Meta keywords are ignored by some search engines, but used by others.

   d. In the **Meta Description** field, enter a brief description of the page for search results listings. Ideally, the description should be from 150-160 characters in length, with a maximum limit of 255.



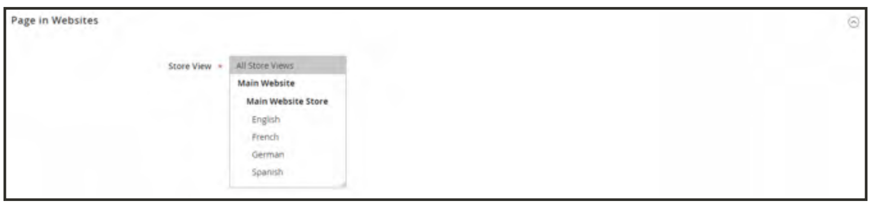
Search Engine Optimization

2. Tap **Save and Continue Edit**.

Step 4: Define the Scope of the Page

1. Expand the **Page in Websites** section.

2. In the **Store View** list, select each view where the page is to be available. If the installation has multiple websites, select each website and store view where the page is to be available.



Pages in Websites

Step 5: Enter Any Design Changes (Optional)

1. Expand the **Design** section. Then, do the following:

Design

a. To change the page layout, set **Layout** to one of the following:

- 1 column
- 2 columns with left bar
- 2 columns with right bar
- 3 columns
- Empty

b. To include additional layout instructions, enter valid XML code in the **Layout Update XML** box.

Step 6: Preview the Page

1. To return to the Pages grid, tap **Save Page**.
2. Fnd the page in the grid. Then in the **Action** column, select **View**.
3. To return to the grid, tap **Back** in the upper-left corner of the browser window.

Step 7: Publish the Page

1. In the **Action** column of the grid, select **Edit**.
2. Set **Enable Page** to "Yes."
3. Tap **Save Page**.

   Now that your page is complete, it can be added to your store navigation, linked to other pages, or added as a link in the footer of your store. You can also use it as your new home page.

Switching Home Pages

You can maintain a selection of different home pages, and activate the page that you want to use as the default home page.

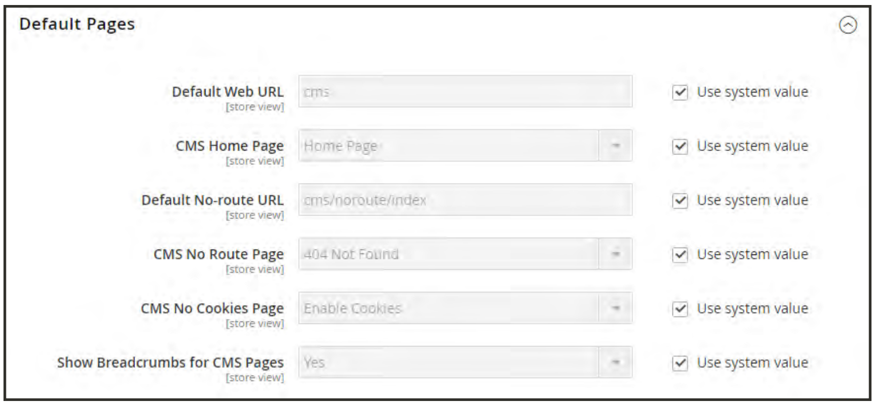
To Change the Home Page:

1. Complete the steps to add a new page.

2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

3. In the panel on the left under **General**, choose **Web**.

4. Expand the **Default Pages** section. Then, do the following:



Default Pages

   a. Set **CMS Home Page** to the new page.

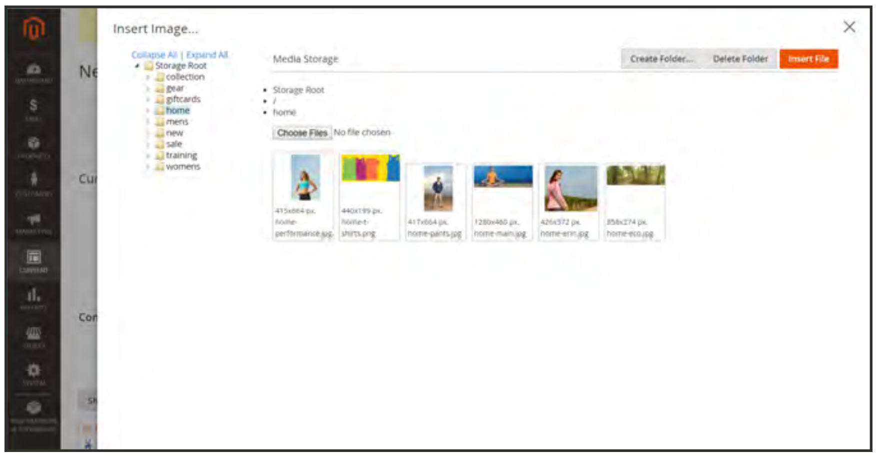
   b. Tap **Save Config**.

5. In the message at the top of the workspace, tap the **Cache Management** link, and refresh any invalid caches.

Media Storage

Media storage helps you organize and gain access to media files that are stored on the server. The path to the location of the files is determined by the Base URL configuration. Files in media storage can be accessed from the editor while working on pages and static blocks. Media storage is usually located in the file system on the same server as the Magento program files.

Alternatively, media files can be managed in a database, or located on a separate server or content delivery network. The editor can be configured to use either static or dynamic media URLs for catalog content in category or product descriptions.



Media Storage

To upload files to media storage:

The first two steps are the same as if you are inserting an image.

1. On the toolbar of the WYSIWYG editor, click **Insert Image** ( ).

2. After the **Image URL** field, click **Browse** ( ).

3. In the directory tree on the left, do one of the following:

   - Navigate to the folder where you want to save the uploaded image.
   - Navigate to the place where you want to create a new folder, and tap **Create Folder**. Then, enter the folder name, and tap **OK**.

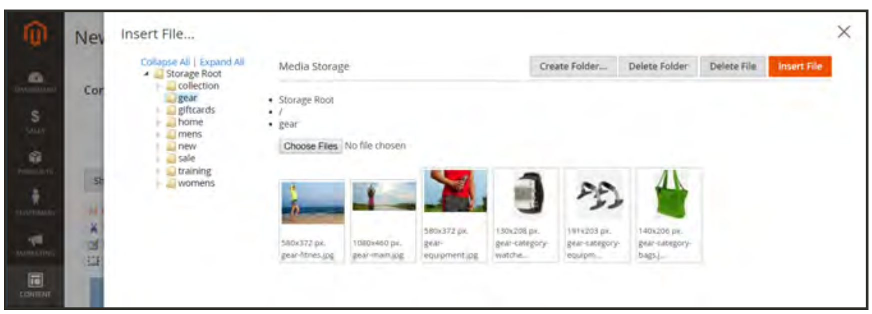
4. To upload file(s) to media storage, tap **Choose Files**. Then, do the following:

   a. In the directory of your local computer, navigate to the location of the images.

   b. Select each image that is to be uploaded.

   c. Tap **Open**.

   The images are uploaded to the current media storage folder on the server.



Media Storage

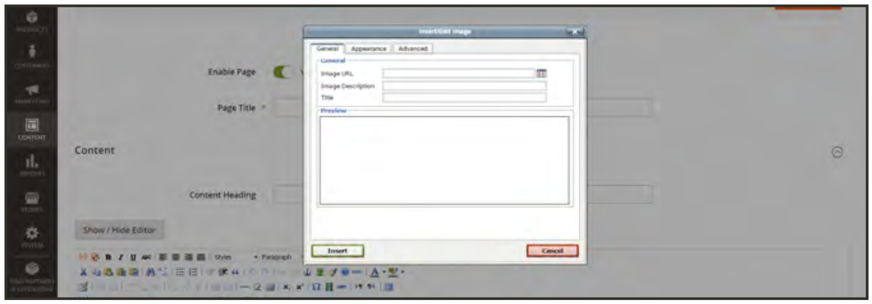
To insert an image from media storage:

Open the page or block to be edited. Then, use one of the following methods to insert an image from media storage:

Method 1: From WYSIWYG Mode

1. On the toolbar of the WYSIWYG editor, click **Insert Image** ( ).

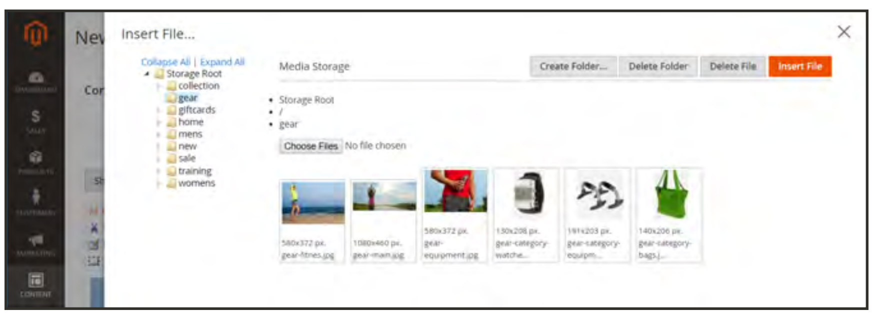
2. After the **Image URL** field, click **Browse** ( ).



Insert Image (WYSIWYG Mode)

3. In the directory tree on the left, navigate to the folder where the image is stored.

4. Select the tile of the image. Then, tap **Insert File**.



Insert File

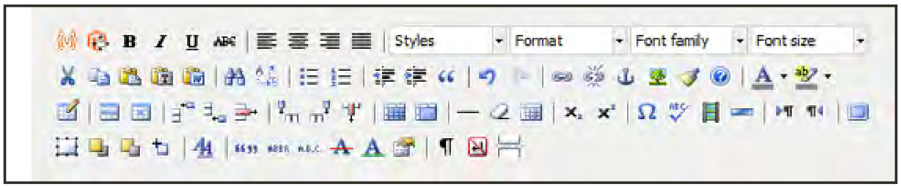
Method 2: From HTML Mode

1. Position the cursor in the code where the `<img>` tag is to be inserted.
2. Tap **Insert Image**.

Insert Image (HTML Mode)

Using the Editor

The editor gives you the ability to enter and format while working in a "What You See Is What You Get" view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for pages, blocks, and product descriptions. When working on product detail, the editor is accessed by clicking the Show/ Hide Editor button. For a complete list of toolbar buttons, see: Using the Editor in the online guide.



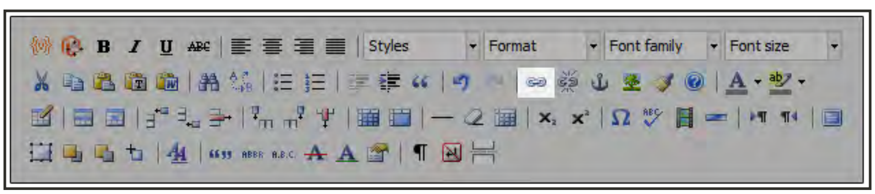
Editor Toolbar

Inserting a Link

An easy way to insert a link is to use the Link button in the editor toolbar. It doesn't require any knowledge of HTML, and the result is the same.

To insert a link:

1. Highlight the text where you want to create the link. Then, in the editor toolbar, tap the **Link** button.

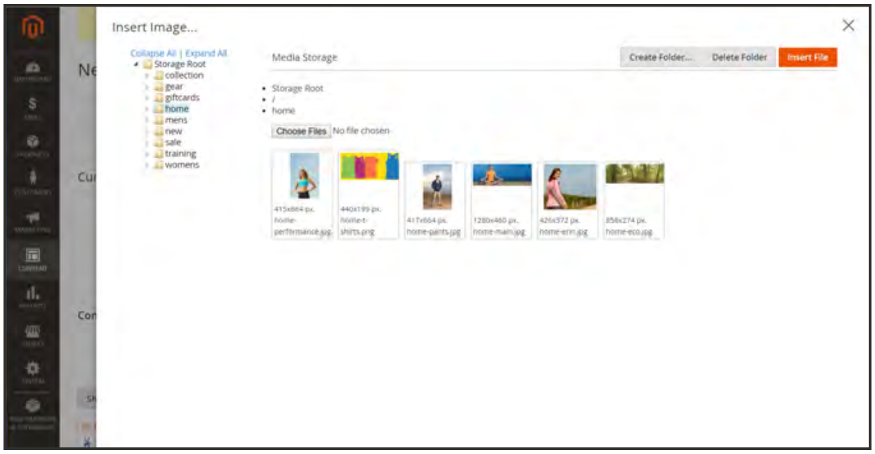


Insert Link Button

2. In the **Link URL** field, enter one of the following:
   - The **URL Key** of a page in your store.
   - The full **URL** of an external page to be linked.
3. Set **Target** to one of the following:
   - Open link in the same window
   - Open in a new window
4. In the **Title** field, enter the tooltip text to appear when someone hovers over the link.
5. Tap **Insert** to create the link.

Inserting an Image

From the editor, you can insert an image that has been uploaded to Media Storage, or link to an image that resides on another server.



Media Storage

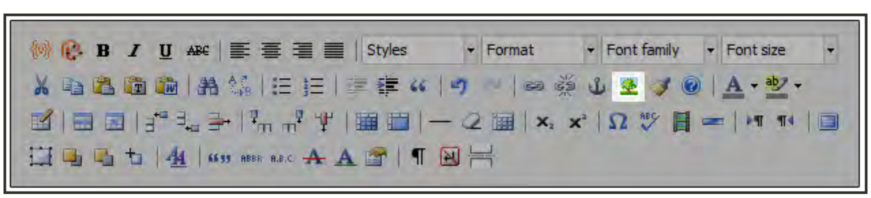
Method 1: Insert an Image from Media Storage

1. If necessary, tap **Show / Hide Editor** to work directly with the code.
2. Position the cursor where you want the code for the image to be inserted. Then, tap **Insert Image**.
3. Choose the image that you want to use, and tap **Insert File**.
4. To view the image in WYSIWYG mode, tap **Show / Hide Editor** again.

Method 2: Insert an Image from Another Server

Use this method to insert an image that is available online, but resides on another server. You must have the full URL of the image to complete the process.

1. If necessary, tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position your cursor where you want the image to appear.
3. On the Editor toolbar, tap the **Insert Image** button. Then, do the following:



Insert Image Button

a. In the **Image URL** field, paste the full URL to the image on the other server.

b. In the **Image Description** field, enter a brief description of the image.

c. In the **Title** field, enter a relevant title for the image.

4. Tap **Insert** to complete the process.

Inserting a Widget

The Widget tool can be used to add a variety of content elements to the page, including links to any content page or node, product, or category. Links can be positioned on the page in a block format, or incorporated directly into the content. You can use the Widget tool to create links to the following types of content:

- Content Pages
- Catalog Categories
- Catalog Products

By default, links inherit their style from the style sheet of the theme.

To insert a widget:

1. Open the content page to be edited.

2. In the panel on the left, choose **Content**. Then, use either of the following methods:

Method 1: WYSIWYG Mode

1. Tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position the cursor in the text where you want the widget to appear.
3. On the editor toolbar, tap **Insert Widget**.

Method 2: HTML Mode

From the HTML editor, tap **Insert Widget**.

3. When prompted, choose the **Widget Type**. This example shows how to insert a link to a product.

4. To use the product name, leave the **Anchor Custom Text** field empty.

5. Enter a **Anchor Custom Title** for best SEO practice. (The title isn't visible on the page.)

6. Set **Template** to one of the following:

   - To incorporate the link into text, select “Product Link Inline Template.”
   - To place the link on a separate line, select “Product Link Block Template.”

7. Tap **Select Product**, and do the following:
   a. In the tree, navigate to the category you want.
   b. In the list, choose the linked product.
   c. Click **Insert Widget** to place the link on the page. In the HTML, a markup tag for the link appears at the top of the page, enclosed in double curly braces.
   d. If needed, use Cut (Ctrl + x) and Paste (Ctrl + v) to position the markup tag in the code where you want the link to appear.
8. Tap **Show / Hide Editor** to see the link in WYSIWYG mode.

   You can continue editing the page, and incorporate other links into the content.

Inserting a Variable

Your store includes many predefined variables that can be incorporated into content pages and other communications. In addition, you can include your own custom variables that are specific to your needs.

To insert a variable on a page:

1. Do one of the following:
   - Open an existing page.
   - Create a new page.
2. In the panel on the left, choose **Content**. Then from the editor, do one of the following:
   - Position the cursor where you want the variable to appear, and tap **Insert Variable**.
   - If you prefer to work with the code, click **Show / Hide Editor**. Position the insertion point in the text where you want the variable to appear. Then, tap **Insert Variable**.
3. In the list of available variables, choose the one you want to insert into the page.
4. When complete, tap **Save**.

Configuring the Editor

The WYSIWYG editor is enabled by default, and can be used to edit content on CMS pages and blocks, and in products and categories. From the configuration you can activate or deactivate the editor, and elect to use static — rather than dynamic — URLS for media content in product and category descriptions.

WYSIWYG Options

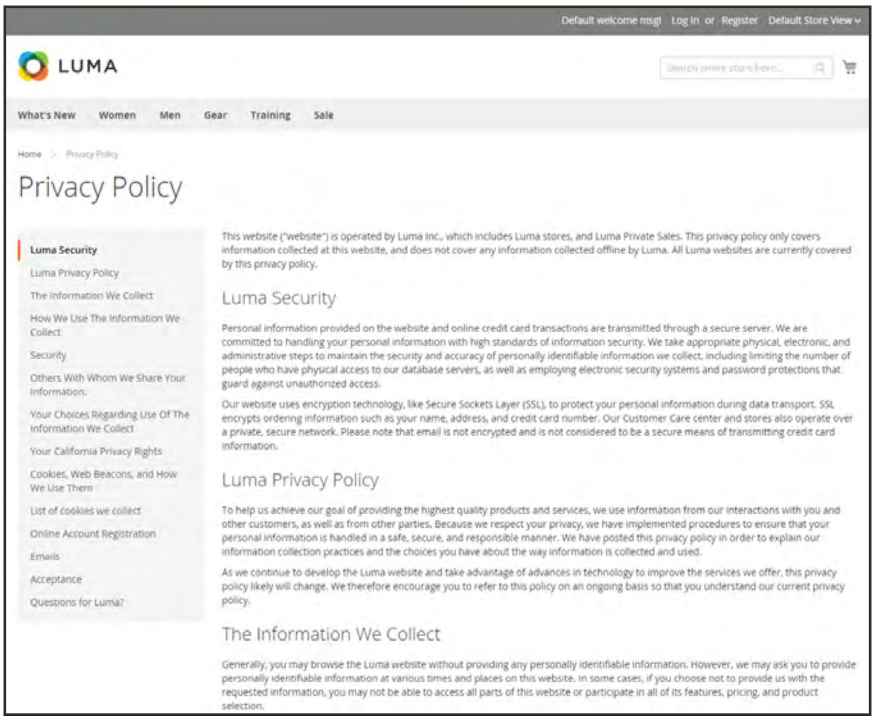
To configure the editor:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Content Management**.
3. Expand the **WYSIWYG Options** section, and do the following:
   a. Set **Enable WYSIWYG Editor** to your preference. The editor is enabled by default.
   b. Set **Static URLs for Media Content in WYSIWYG for Catalog** to your preference for media content that is included in category and product field descriptions.
4. When complete, tap **Save Config**.

Page Hierarchy

Your store's page hierarchy system gives you the ability to organize your content pages and add pagination, navigation, and menus. The Privacy Policy page in the sample data is an example of a page with a menu on the left. If you publish a large amount of content on a regular basis, you can use page hierarchy to organize your content to make it easy for people to find articles of interest.

The page hierarchy system uses nodes to identify related pieces of content, and to organize content pages into a parent/child relationships. A parent node is like a folder that might contain child nodes and pages. The relative position of each node and page in the hierarchy is shown as a tree. A node might contain other nodes and content pages, and a single content page might be associated with multiple nodes and other content pages in a parent/child or neighbor relationships.



Page with Left Navigation

Configuring Page Hierarchy

The configuration settings activate the page hierarchy system and metadata, and determine the default menu layout.

CMS Page Hierarchy

To configure page hierarchy:

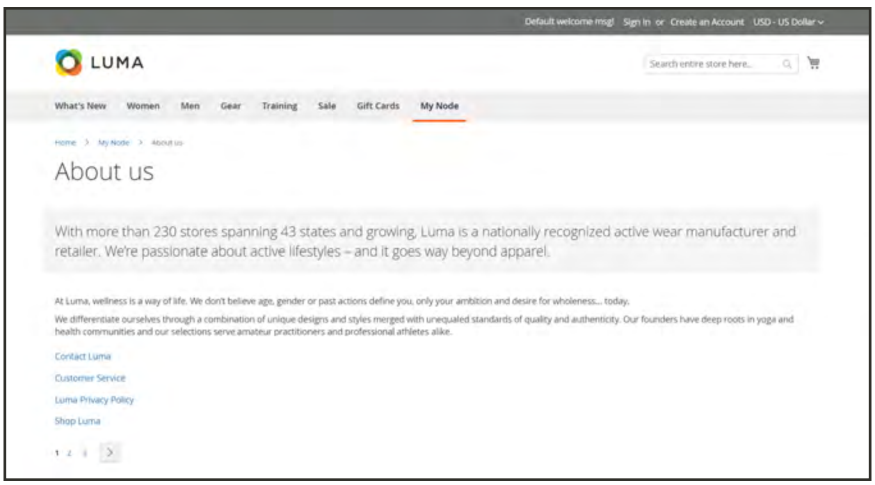
1. On the sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Content Management**.
3. Expand the **CMS Page Hierarchy** section, and make any changes that are necessary.
4. When complete, tap **Save Config**.

Adding a Node

The following example shows how to create a node with simple navigation to related content pages. Although a node does not have a content page associated with it, it does have a URL Key which can be referenced elsewhere in your site.

For example, you might create a node called "Press Releases" that has navigation to individual press releases. Then, you can include the link on your "About Us" page to the node. Or you might create a node for a collection of back issues of your newsletter.

To link to a node, use the Widget tool to create a CMS Hierarchy Node Link. Then, place the widget in a content block or page.



Navigation Menu on About Us Page

Process Overview:

Step 1: Create a Node

Step 2: Add Pages to the Node

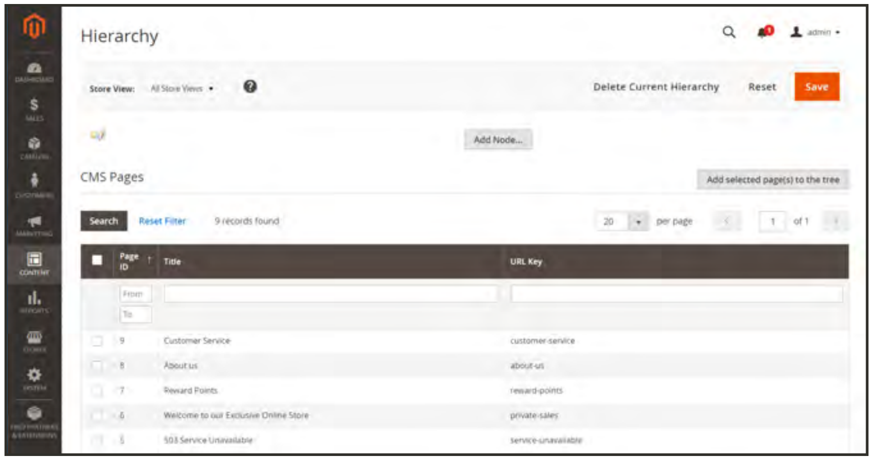
Step 3: Define the Structure

Step 4: Add Pagination Controls

Step 5: Choose the Menu Layout

Step 1: Create a Node

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Hierarchy**.

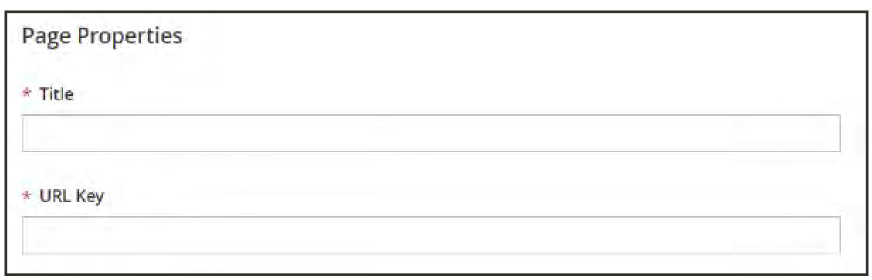


Hierarchy - CMS Pages Grid

2. Above the grid, tap **Add Node**. Then, do the following:

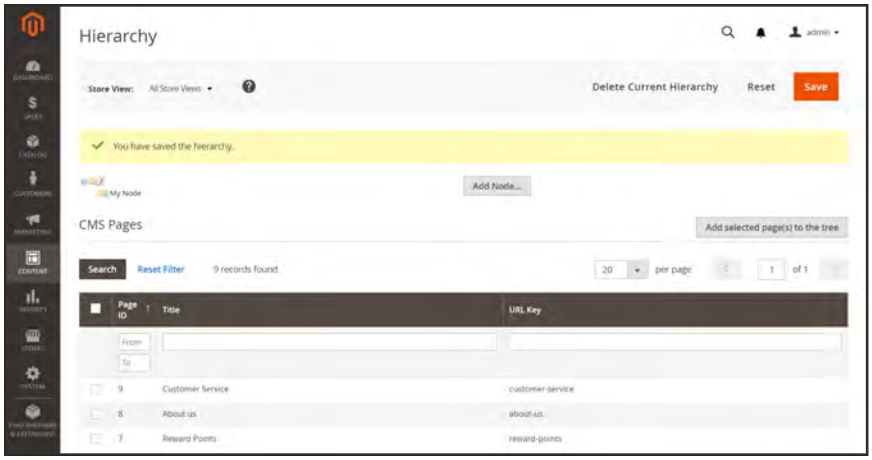
   a. Under **Page Properties**, type a **Title** for the node.

   b. Enter a suitable **URL Key** in all lowercase characters, using hyphens to separate words, instead of spaces.



Page Properties

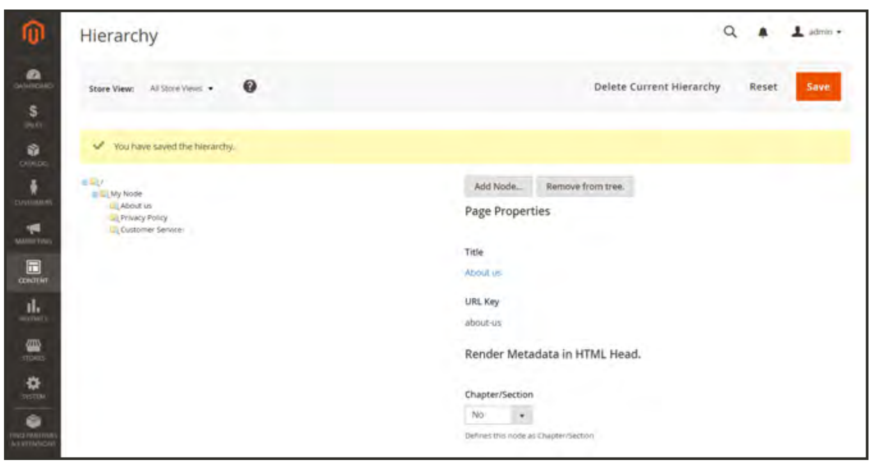
   c. Tap **Save**. The node appears as a folder in the tree on the left of the page.



Node Added to Page Hierarchy Tree

Step 2: Add Pages to the Node

1. In the hierarchy tree, click the node to open it in edit mode.
2. Scroll down to the **CMS pages** section, and mark the checkbox of each page you want to include in the hierarchy.
3. Tap **Add Selected Pages(s) to Tree**. Each selected page appears in the tree below the node folder.



Pages Added to Tree

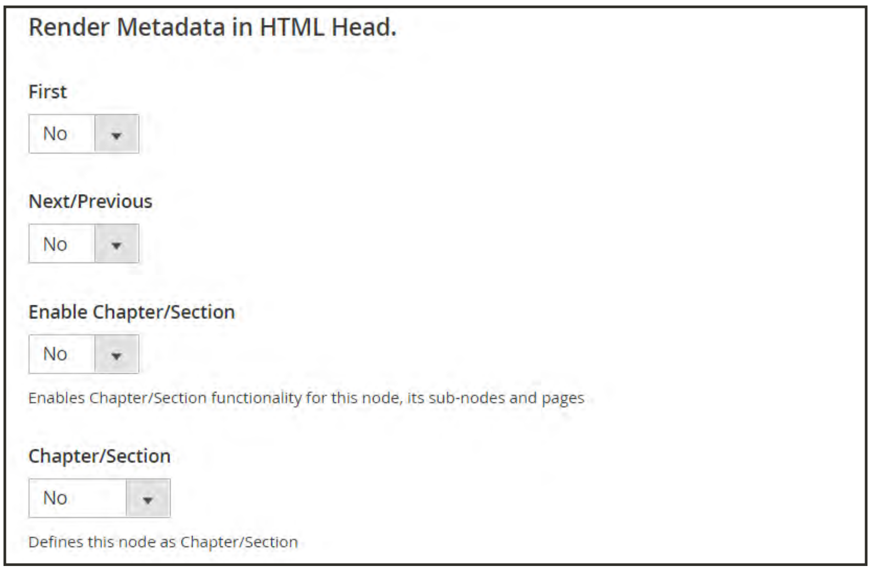
Step 3: Define the Structure

1. If necessary, drag the pages into position to reflect the order that they are to appear in the menu.

Drag Pages into Position

2. Click the node at the top of the hierarchy. The Page Properties section now displays information about the node.

3. Under **Render Metadata in HTML Head**, do the following:



Render Meta Data

a. To identify the node as the top of the hierarchy, set **First** to “Yes.”

b. To display a pagination control, set **Next/Previous** to “Yes.

c. To organize the pages in the hierarchy as a book, set **Enable Chapter/Section** to “Yes.”

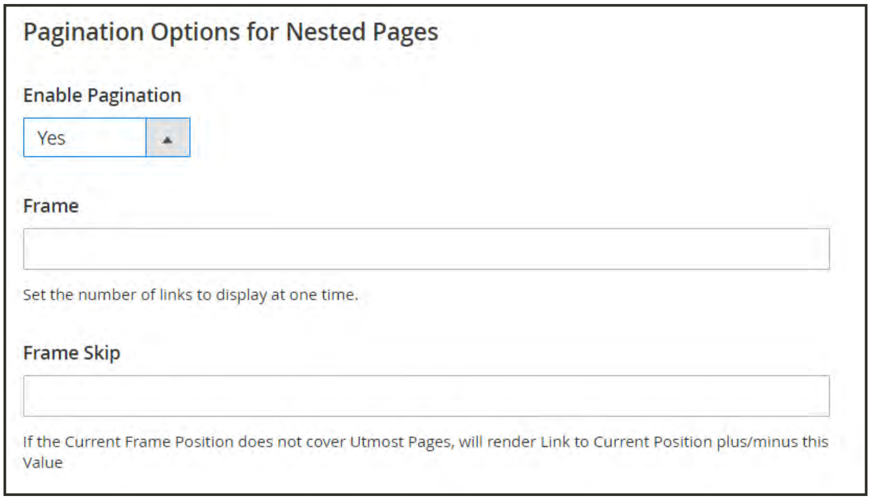
d. To assign the node to a specific part of the book, set **Chapter/Section** to one of the following:

- Chapter
- Section
- Both

If you don't want to include the node as part of the book, choose "None."

Step 4: Add Pagination Controls

1. Under**Pagination Options for Nested Pages**, set **Enable Pagination** to "Yes."



Pagination Options

2. In the **Frame** field, enter the number of page links that you want to include in the pagination control

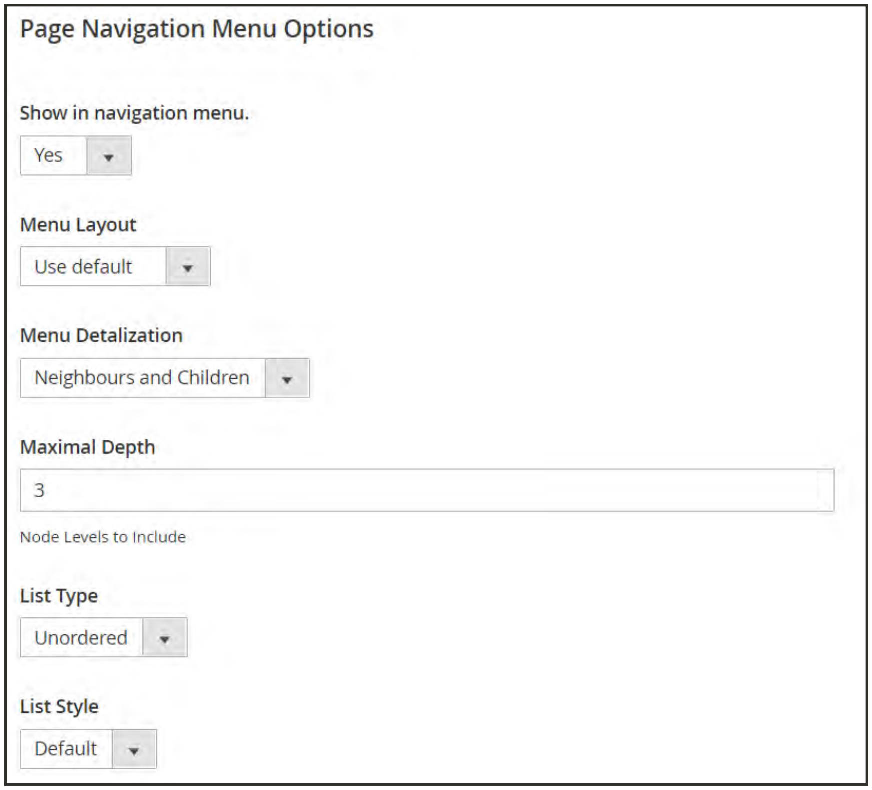
3. If there are more pages in the hierarchy that can be included in the pagination control, do the following:

   In the **Frame Skip** field, enter the number of pages that you want to skip ahead (or back) for the next set of pagination links.

Step 5: Choose the Menu Layout

1. If you want the mode to appear in the menu, do the following:

   a. Under **Page Navigation Menu Options**, set **Show in Navigation Menu** to "Yes".



Page Navigation Menu Options

   b. To specify the location of the menu in relation to the content, set **Menu Layout** ot one of the following:

   - Use Default
   - Content
   - Left Column
   - Right Column

   c. To specify how much detail is included in the menu, set **Menu Detalization** to one of the following:

Only Children	Includes only subpages in the menu.
Neighbours and Children	Includes subpages and other pages that re at the same level in the hierarchy.

   d. To determine the depth of the menu, set **Maximal Depth** to the maximum number of levels to include.

e. To format the menu, choose the **List Type** and corresponding **List Style**.

Unordered	The menu options are not numbered, and can be formatted with or without bullets..
Ordered	The menu options are numbered, and can be formatted as numeric, alphabetic, or roman numerals in either upper-or lowercase.

2. Under **Main Navigation Menu Options**, do the following:

   If you want the node to be visible in the navigation menu, set **Show in Navigation menu** to "Yes".

Main Navigation Menu Options

3. When complete, tap **Save**.

Field Descriptions

FIELD	DESCRIPTION
NODE PROPERTIES	
Title	The name of the the node.
URL Key	A unique web address for the node.
RENDER METADATA IN HTML HEAD	
This settings in this section apply only to top-level nodes and pages, and define the structure of the hierarchy.	
First	Identifies the first page in the hierarchy. Options: Yes / No
Next/Previous	Adds Next and Previous page links so readers can browse in sequence. Options: Yes / No
Enable Chapter/Section	Determines if the content can be organized as a book, with chapters and sections. Options: Yes / No
Chapter/Section	Options:

Field Descriptions (cont.)

FIELD	DESCRIPTION	
	No	Does not assign a book part to the current node.
	Chapter	Assigns the current node as a chapter.
	Section	Assigns the current node as a section.
	Both	Assigns the current node as both a chapter and section.
PAGINATION OPTIONS FOR NESTED PAGES		
Enable Pagination	Determines if a pagination control appears at the bottom of the each page. Options: Yes / No	
Frame	Determines the number of pagination links that appear in the pagination control.	
Frame Skip	Specifies the number of pages to skip ahead if there are additional pages beyond what is visible in the pagination control.	
PAGE NAVIGATION MENU OPTIONS		
Show in Navigation Menu	Determines if a navigational menu is generated for the page hierarchy. Options: Yes / No	
Menu Layout	Determines the default layout of navigation menu. Options:	
	Use Default	Uses the menu style that is specified in the configuration.
	Left Column	The menu appears to the left of the content.
	Right Column	The menu appears to the right of the content.
Menu Detalization	Determines the level of detail that is to be included in the menu. Options:	
	Only Children	Includes only subpages i(children) in the menu.
	Neighbors and Children	Includes both subpages and other pages at the same level in the hierarchy (neighbors) in the menu.
Maximal Depth	Determines the number of levels in the menu.	

Field Descriptions (cont.)

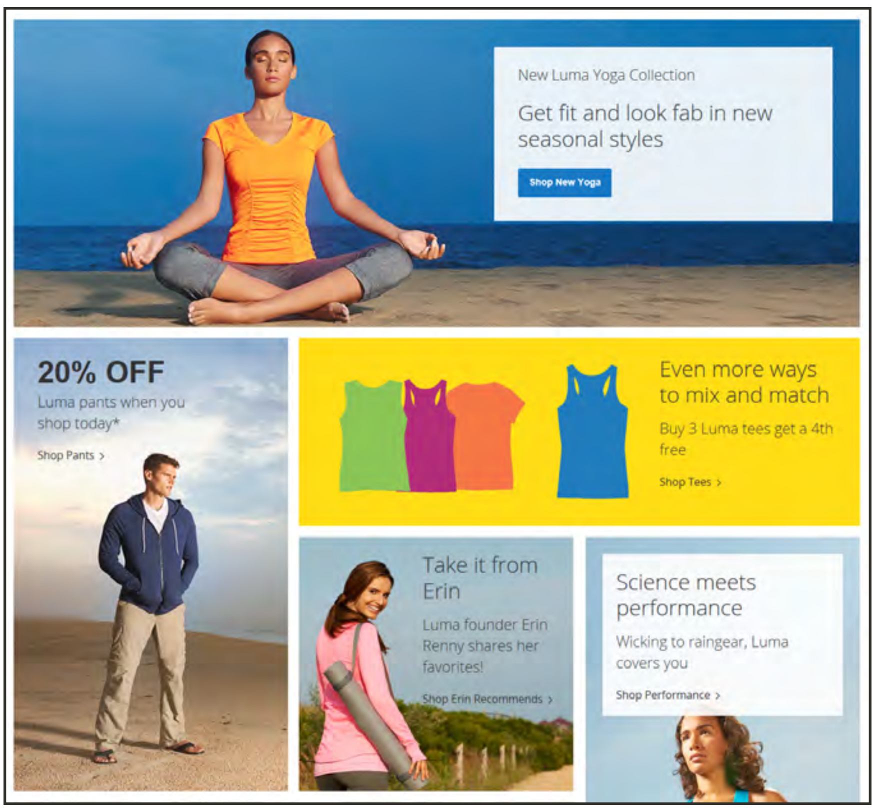
FIELD	DESCRIPTION	
List Type	Determines the style that is applied to the menu. Options:	
	Unordered	Creates a list of menu options that can be styled with or without bullets. List Style Options: Default Circle Disc Square
	Ordered	Creates a list of numbered menu options that can be numbered. List Style Options: Default Numbers (1, 2, 3,...) Lower Alpha (a, b, c. ...) Upper Alpha (A, B, C, ...) Lower Roman (i, ii, iii, ...) Upper Roman (I, II, III, ...)
MAIN NAVIGATION MENU OPTIONS		
Show in navigation menu	Determines if the selected node is visible in the navigation menu. Options: Yes / No	

CHAPTER 45:

Content Blocks

A block is a modular unit of content that can be positioned most anywhere on the page. Content blocks are sometimes referred to as static blocks, or CMS blocks, and can be used to display fixed information such as text, images, and embedded video, as well as dynamic information from a widget or that originates in a database or other source. Most elements on the home page are blocks that can be easily managed.

You can create custom blocks of content without writing any code, and assign them to appear in a specific place in the page layout. Blocks can also be defined and positioned by making a layout update in XML code.

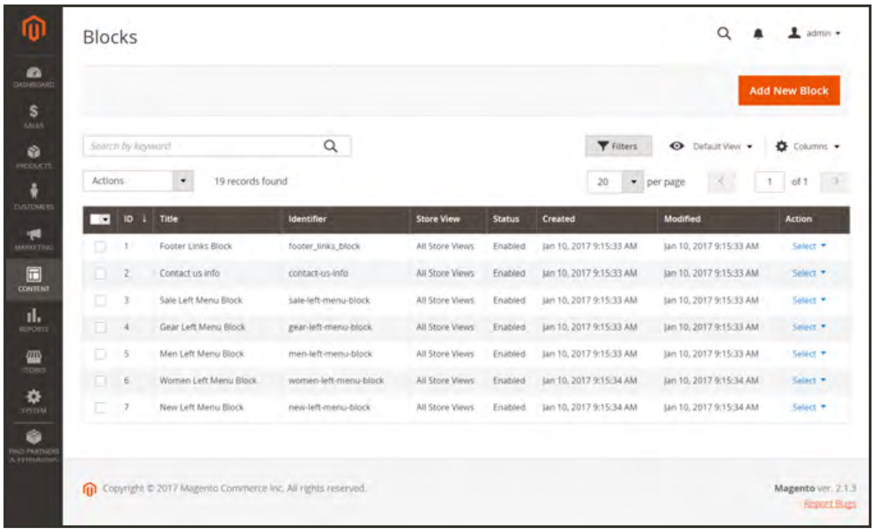


Blocks on Home Page

Adding New Blocks

Custom blocks of content can be added to any page, group of pages, or even to another block. You can place code for a carousel image slider in a block, and then position the block on the home page.

The Blocks workspace uses the same basic controls as the Pages workspace to help you find blocks and perform routine maintenance operations.

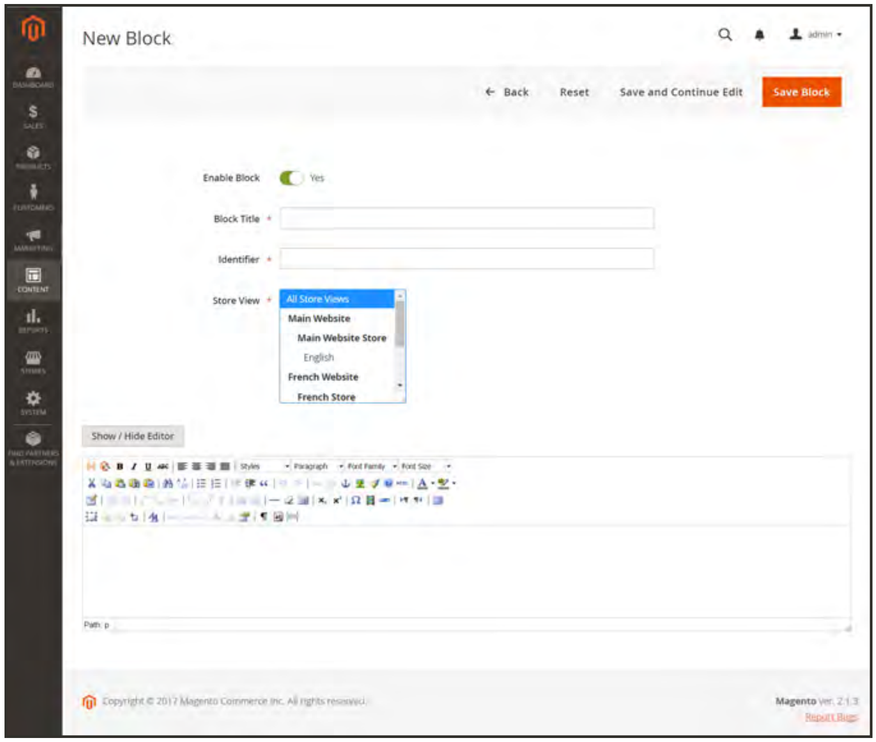


Blocks Workspace

To create a block:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.

2. In the upper-right corner, tap **Add New Block**. Then, do the following:



New Block

   a. By default the status of the new block is enabled. If you want to change the status, set **Enable Block** to "No."

   b. Assign a **Block Title** for internal reference.

   c. Assign a unique **Identifier** for the block. Use all lowercase characters, with underscores instead of spaces.

   d. Select each **Store View** where the block is to be available.

   e. Complete the block **Content** as needed.

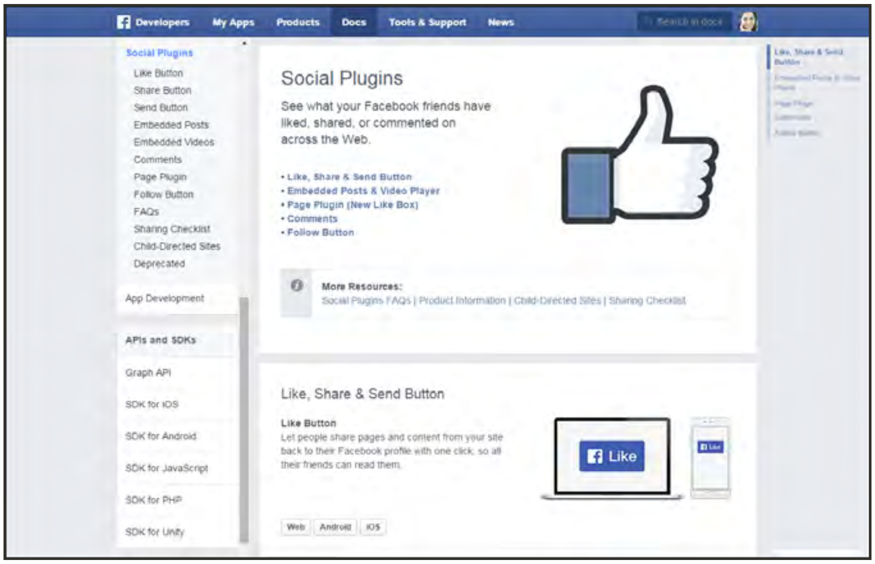
      - Use the editor to format text, create links and tables, images, video, and audio.
      - If you prefer to work with the HTML code, tap **Show / Hide Editor**.

3. When complete, tap **Save Block**.

   The new block appears at the bottom of the list in the Blocks grid.

Adding Social Plugins

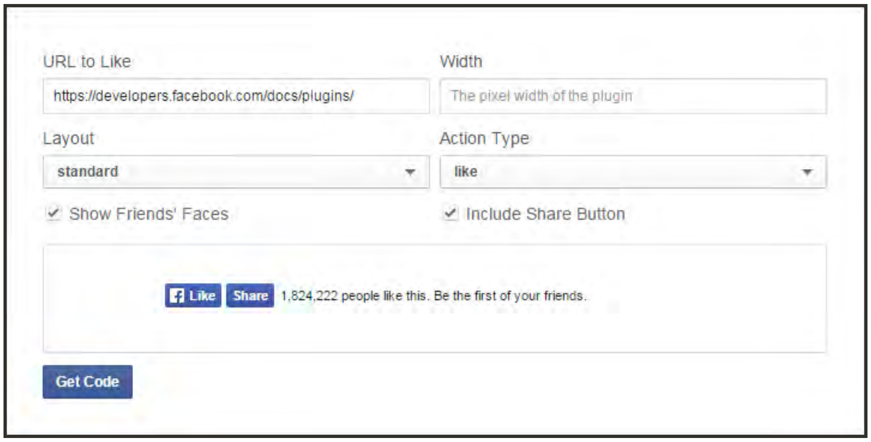
Social networking sites have a numerous plugins that can easily be added to your store. In addition, there are many extensions on Magento Connect that can be used to integrate your store with social media. The following example shows how to add a Facebook "Like" button to your store.



Facebook Plugins

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 store views, choose each **Store View** where the block is to be available.
   d. Paste the snippet of code that you copied from the Facebook site into the **Content** box.
   e. If the block is not ready to "go live," set **Enable Block** to "No."
3. When complete, tap **Save Block**.

Step 3: Place the Block

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then, do the following:
   a. In the Settings section, set **Type** to "CMS Static Block." Then, tap **Continue**.
   b. Verify that **Design Theme** is set to the current theme.
   c. Tap **Continue**.
3. In the Storefront Properties section, do the following:

a. In the **Widget Title** field, enter a title for internal reference.

b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.

c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.

4. In the Layout Updates section, tap **Add Layout Update**. Then, set **Display On** to the category, product, or page where you want the block to appear.

   For example, if you choose “All Pages,” and position the block in either the header or footer, the block will appear in the same place on every page of the store.

   To place the block on a specific page, do the following:

   a. Set **Display On** to “Specified Page.” Then, select the **Page** where you want the block to appear.

   b. Choose the **Block Reference** to identify the place on the page where the block is to be placed.

   c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."

   d. Tap **Save and Continue Edit**.

5. In the panel on the left, choose **Widget Options**.

6. Tap **Select Block…**. Then in the list, choose the block that you want to place.

7. When complete, tap **Save**.

8. When prompted, follow the instructions at the top of the workspace to update the index and page cache.

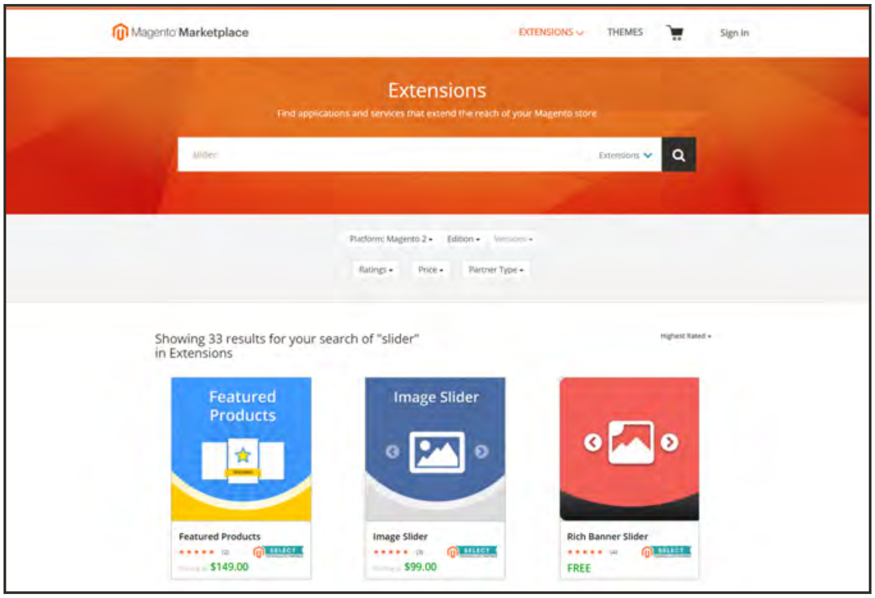
   The widget now appears in the Widgets grid.

Step 4: Verify the Location in Your Store

Return to your storefront to verify that the block is in the correct location. To move the block, you can reopen the widget try a different page or block reference.

Adding a Lightbox or Slider

There is a wide assortment of jQuery-based image lightboxes, sliders, and carousels available on Magento Marketplace, and some are free.



Slider Extensions

To add a lightbox or slider to your store, download the extension from Magento Markeplace, and follow the instructions to install the extension. For additional help, see the documentation provided by the developer.

Positioning Blocks

The code that controls the page layout and placement of blocks is written in XML Widgets make it easy to position a block at a specific place on the page, and even for a specific product or category without writing any code. You can choose each option from a list, rather than trying to remember all of the possible combinations.

The following list shows the locations by page type where blocks are typically placed. To learn more about how areas on the page are defined, see: Standard Page Layouts.

Category and CMS Pages

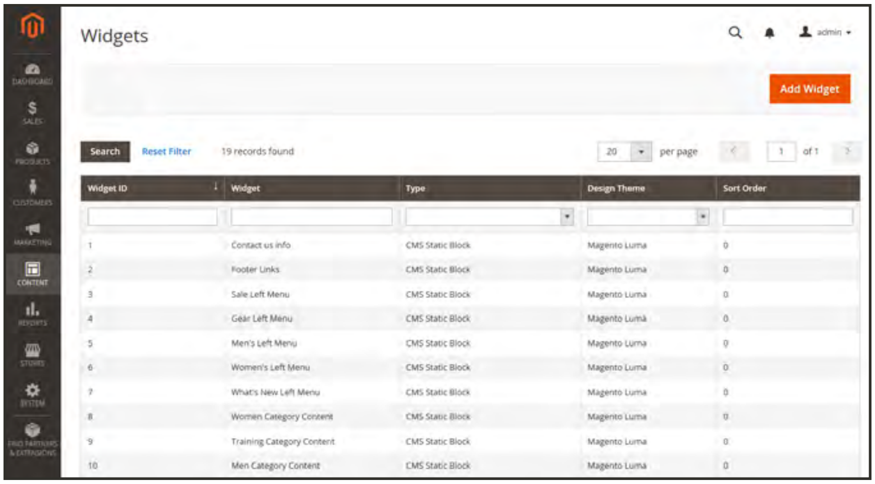
BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition) Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.

Using a Widget

The CMS Static Block widget gives you the ability to place an existing content block most anywhere in your store.



Process Overview:

Step 1: Choose the Type

Step 2: Complete the Layout Updates

Step 3: Place the Block

Step 1: Choose the Type

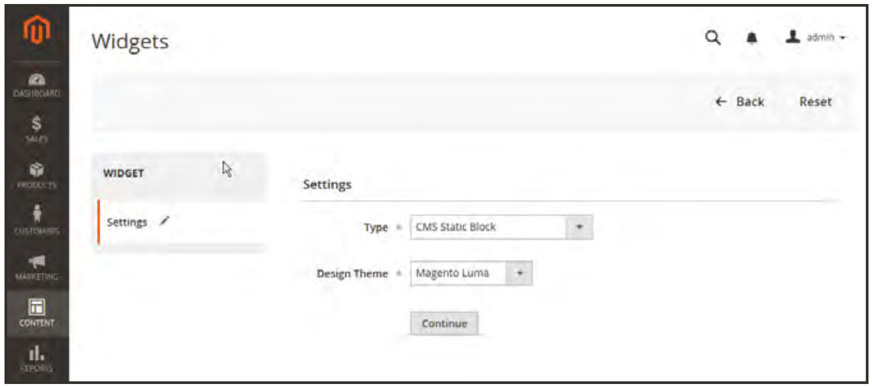
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.

2. In the upper-right corner, tap **Add Widget**. Then do the following:

   a. In the Settings section, set **Type** to "CMS Static Block." Then, tap **Continue**.

   b. Verify that **Design Theme** is set to the current theme.

   c. Tap **Continue**.



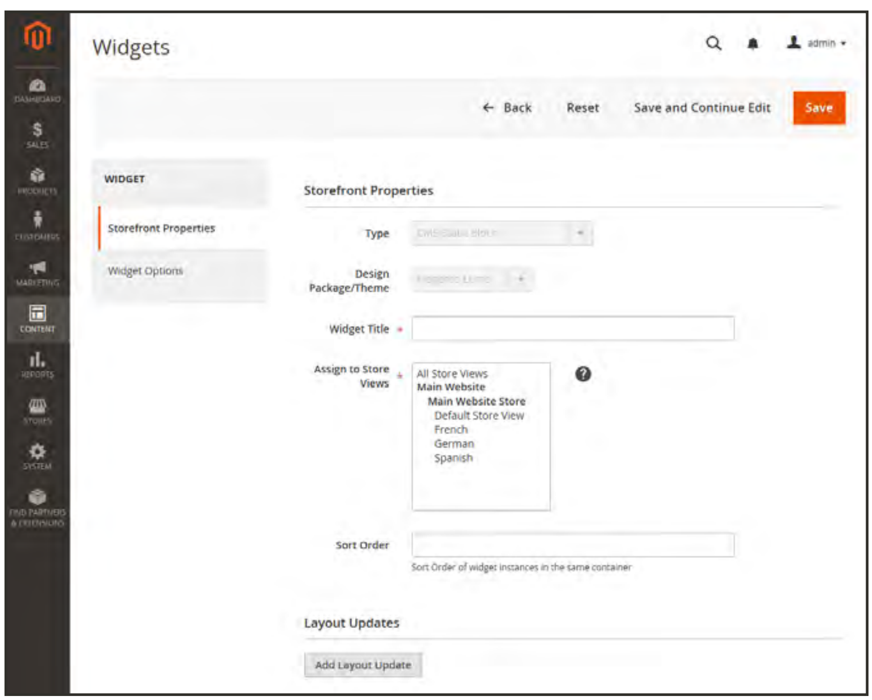
Settings

3. In the Storefront Properties section, do the following:

   a. In the **Widget Title** field, enter a descriptive title for internal reference.

   b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.

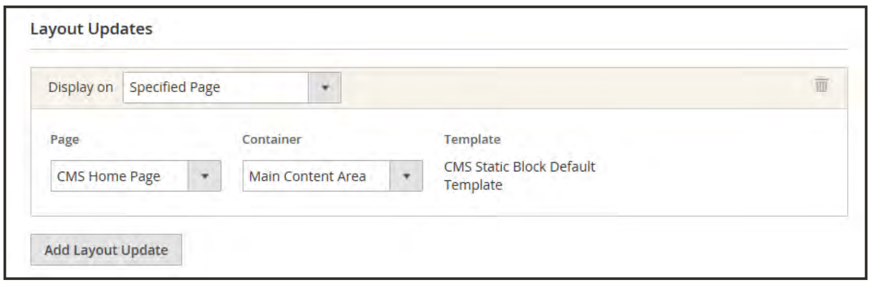
   c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.



Storefront Properties

Step 2: Complete the Layout Updates

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
2. Set **Display On** to the category, product, or page where you want the block to appear. To place the block on a specific page, do the following:
   a. Choose the **Page** where you want the block to appear.
   b. Choose the **Block Reference** that identifies the place on the page where the block is to be placed.
   c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."



Layout Updates

Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.
2. Tap **Select Block…**. Then in the list, choose the block that you want to place.
3. When complete, tap **Save**.

   The app now appears in the list.
4. When prompted, follow the instructions at the top of the workspace to update the index and page cache.
5. Return to your storefront to verify that the block appears in the correct location. To move the block, you can reopen the frontend app try a different page or block reference.

Using a Layout Update

Blocks can be placed in the left or right sidebar of a specific page by making a layout update to the XML code. With a few simple changes to the code, you can position the block in either sidebar, and control its position in relation to other blocks.

The term callout[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.

   Code for CMS Block in Sidebar

   ```
                                       <reference name="right">
   <block type="cms/block" name="right.permanent.callout">
   <action method="setBlockId"><block_id>your-block-id</block_id></action>
   </block>
   </reference>
   ```

   b. Change the **reference name** to identify either the “right” or “left” column, according to the layout of the page.

   c. Change the **block_id** to the identifier of the block that is being placed.
6. When complete, tap **Save Page**.

[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 46:

Banners

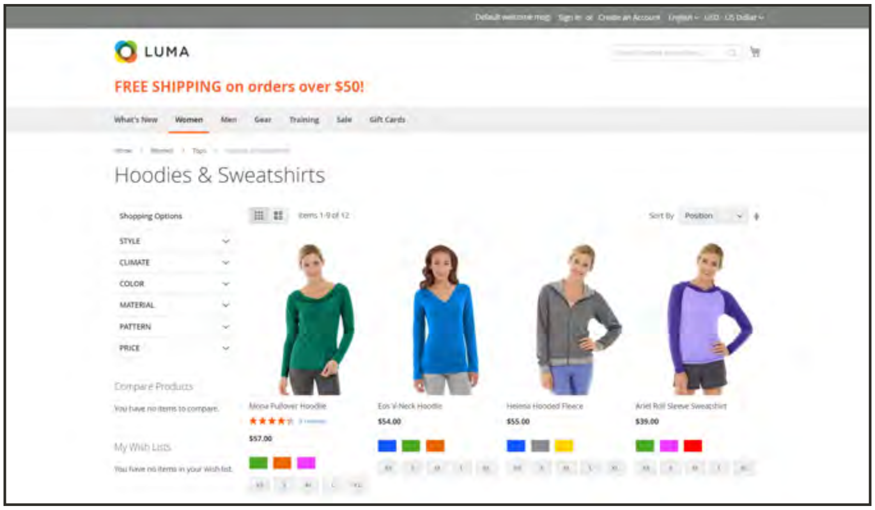
Banners can be used to display an image or block of content, and appear for a specific period of time for a promotion. You can create banners that are visible only to certain customer segments, or whenever price rule conditions and coupons apply.

When designing banners for your store, take into consideration both the page layout and the theme you are using. Banners are often designed to appear on a specific page, and in a specific part of the page layout. Although the header and footer are a fixed width, the width of the content area and sidebars, can vary according to theme and page layout. When designing a banner with graphic images, it is important to understand the page layout, so you can put the available space to best use.

Banner on Home Page

Creating a Banner

A banner can be as simple as a text message or image, or contain a combination of text, images, and code that is triggered by a promotion according to schedule. After the banner is created, use the Widget tool to place it in your store, or add it to a rotating sequence of banners.



Free Shipping Banner in Header

Process Overview:

Step 1: Complete the Banner Properties

Step 2: Complete the Banner Content

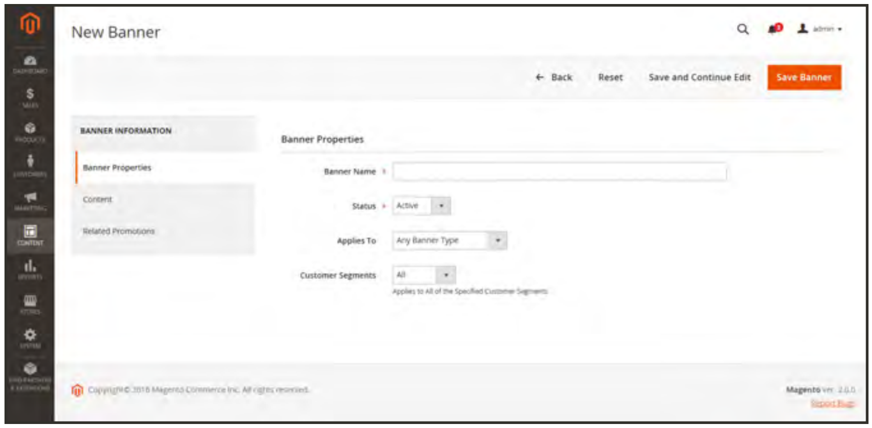
Step 3: Choose a Related Promotion (optional)

Step 4: Place the Banner

Step 1: Complete the Banner Properties

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Banners**.
2. In the upper-right corner, tap **Add Banner**. Then, do the following:
   a. Enter a **Banner Name** for internal reference.
   b. Set **Status** to "Active."
   c. In the **Applies To** list, select one of the following:
      - Any Banner Type
      - Specified Banner Types

      This setting determines the location on the page where the banner is placed. (To select more than one, hold the Ctrl key down and click each option.)



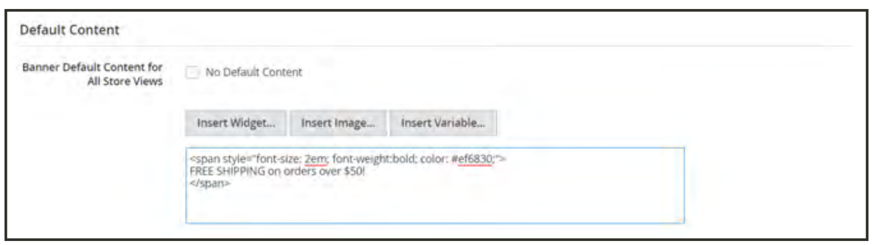
Banner Properties

d. If the banner is to be used for a specific customer segment, set **Customer Segments** to "Specified." Then, choose each customer segment that is associated with the banner.

Step 2: Complete the Banner Content

1. In the panel on the left, choose **Content**.

2. If the banner is to use the same content for each store view, clear the **No Default Content** checkbox.



Default Content

3. In the text box, enter the HTML code that is needed to format the banner. Then, do any of the following:

Insert Widget

1. Tap **Insert Widget**.
2. Choose the **Widget Type**.
3. Complete the **Widget Options**.
4. Tap **Insert Widget**.

Insert Image

1. Tap **Insert Image**.
2. In the text box, position the cursor where you want the image tag to be inserted.

3. Do either of the following:
   - Tap **Browse** to find the image on your local computer.
   - Locate the image in the media folders on the left.
4. Tap **Insert File**.

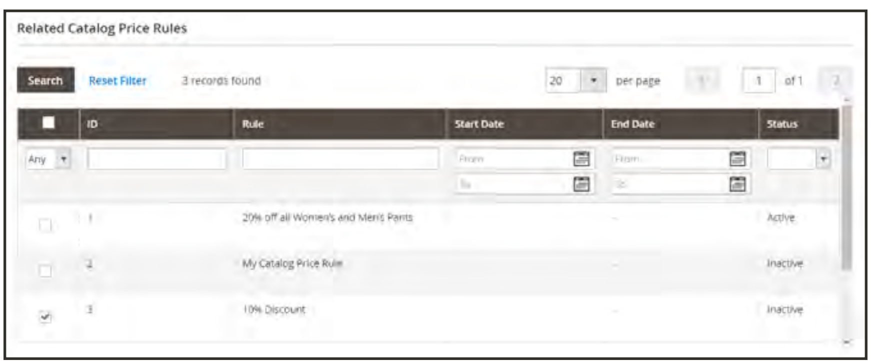
Insert Variable

1. To insert a variable, tap **Insert Variable**. Then, choose the variable that you want to insert.
2. Complete the HTML as needed. Depending on the content, the text box might contain a combination of HTML and markup tags.

4. To create content for a specific store view, do the following:
   a. In the Store View Specific Content box after the name of the store view, clear the **Use Default** checkbox.
   b. Follow the instructions in the previous step to enter the banner content for the store view.

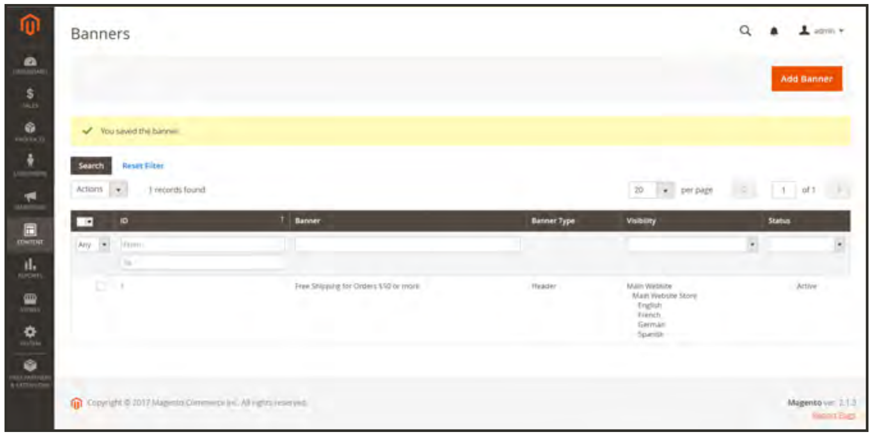
Step 3: Choose a Related Promotion (optional)

1. In the panel on the left, choose **Related Promotions**.
2. Scroll down through the list of available promotions for the type of price rule, and mark the checkbox of each promotion that can be used with the banner.



Related Promotions

3. When complete, tap **Save Banner**.



Banner Saved

Step 4: Place the Banner

Use the Widget tool to create a Banner Rotator that places the banner at a specific location in the store.

Banner Type by Location

LOCATION	DESCRIPTION
Content Area	The width of the main content area varies, depending on the 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 Widget

Step 3: Configure the Banner Rotator

Step 1: Create the Individual Banners

Create the individual banners that you want to include in the rotator.

Step 2: Add a Widget

Follow the basic steps to add a widget.

- Set **Type** to "Banner Rotator."
- Under **Layout Updates**, choose the page and location where the banner rotator is to appear.

Step 3: Configure the Banner Rotator

1. In the left panel, choose **Widget Options**. Then, do the following:

   a. Set **Banners to Display** to “Specified Banners.”

   b. (Optional) To limit the banner to a certain area of the page, set **Restrict by Banner Types** to the place on the page where you want the banner to appear.

   c. Set **Rotation Mode** to one of the following:

      - Do not rotate, display all at once
      - One at a time, Random
      - One at a time, Series
      - One at a time, Shuffle

2. To choose the banners to be included in the rotator, do the following:

a. In the Specify Banners section, use Search to find the banners you want to include. If necessary, tap **Reset Filter** to list all the available banners.

b. Mark the checkbox of each banner you want to include in the rotator.

c. To set the sequence of each banner in relation to the others, enter a number in the **Position** column. To place a banner in the first position, enter the number 1.

3. When complete, tap **Save**.

Banner Layout Update Options

OPTION	DESCRIPTION
Display On Categories	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: Breadcrumbs Left Column Main Content Area My Cart Extra Actions Navigation Bar Page Bottom Page Footer Before Page Footer Bottom Page Header Page Top Right Column Store Language
Template	Options include: Banner Block Template

Banner Layout Update Options (cont.)

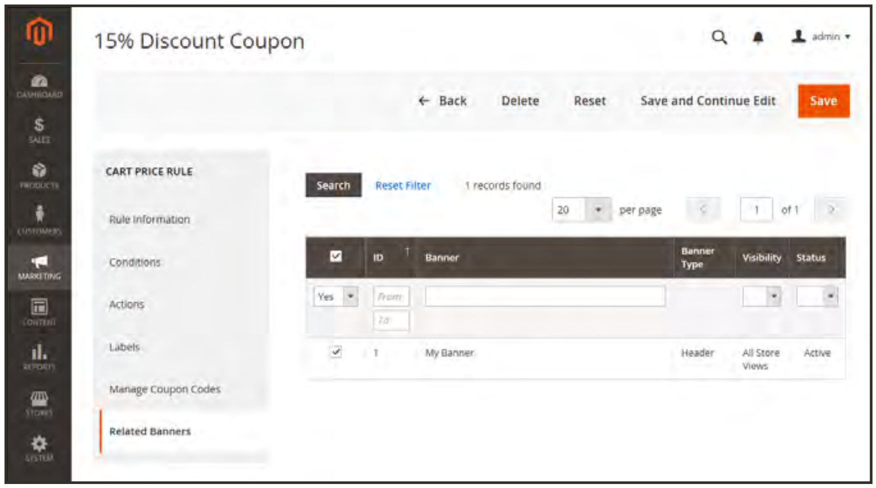
OPTION	DESCRIPTION
	Banner Inline Template

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. One at the time, Series — Displays the banners that you specify by the order of their position every time the page is refreshed. One at the time, Shuffle — Displays one banner at a time in a shuffled position order. This option is similar to the One at a time, Random option, except that the same banner does not repeat back-to-back (unless you have only one banner).
Specify Banners	Select the banners to include from the list of available banners.

Using Banners in Price Rules

Any banners you create can be associated with both catalog and cart price rules for a promotion. To associate a banner with a price rule, you must first create both the banner and the price rule. Related banners can be associated with a price rule from the Banner tool, or from either the Cart Price Rule or Catalog Price Rule tool.

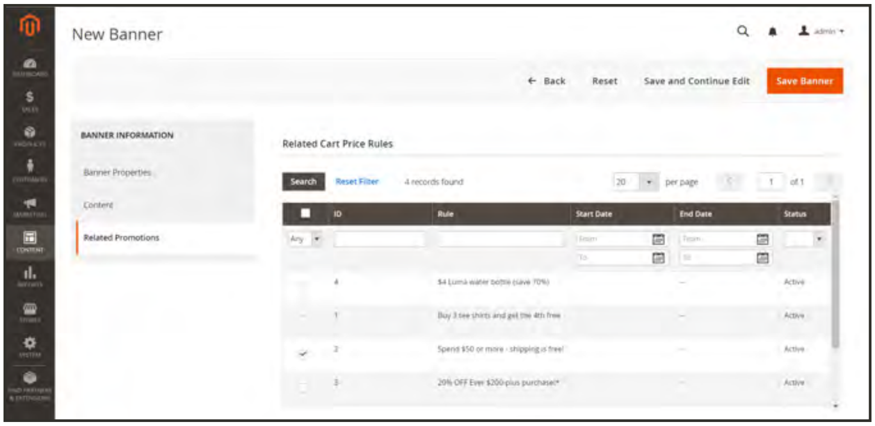


Related Banners

To associate a banner with a price rule:

1. On the Admin sidebar, tap **Marketing**. Then, under **Promotions**, choose one of the following:
   - Catalog Price Rules
   - Cart Price Rules
2. In the grid, open the rule that is to have the banner. Then, do the following:

a. Scroll down and expand the **Related Banners** section to display the lists of available Cart and Catalog Price Rules.



Related Promotions

b. If necessary, use the search filters to find the price rule(s) that you want. Then, mark the checkbox of each banner that you want to associate with the price rule.

> If your banners don’t appear in the grid, tap Reset Filter.

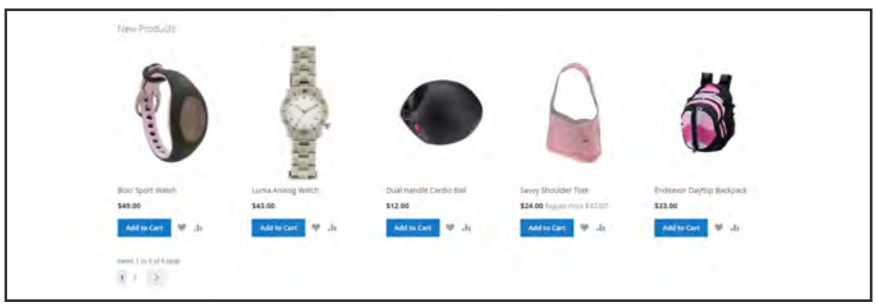
3. When complete, tap **Save Rule**.

CHAPTER 47:

Widgets

A widget is a snippet of code that makes it possible to display a wide range of content and place it at specific block references in your store. Many display real-time, dynamic data and create opportunities for your customers to interact with your store. The Widget tool makes it easy to place existing content such as blocks with images and text, and interactive elements most anywhere in your store.

You can use widgets to create landing pages for marketing campaigns, display promotional content at specific locations throughout the store. Widgets can also be used to add interactive elements and action blocks for external review systems, video chats, voting, and subscription forms, or to provide navigation elements for tag clouds and image sliders.



New Product List Widget

Widget Types

Widgets

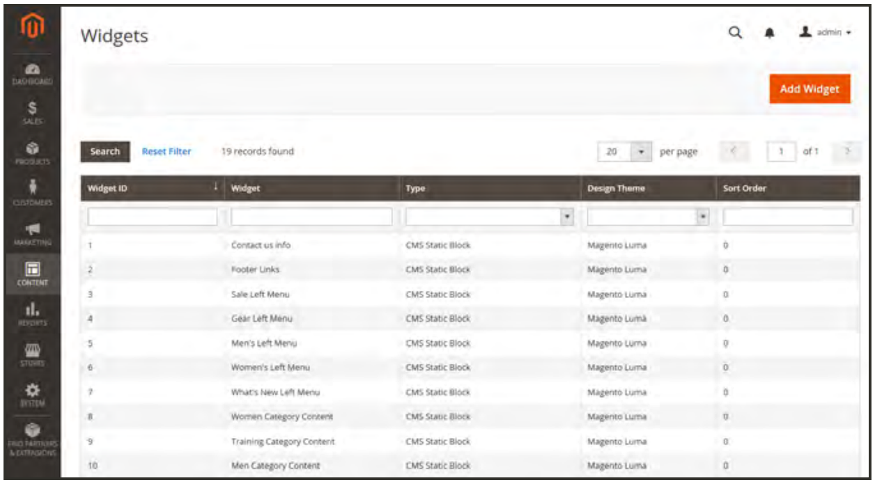
TYPE	DESCRIPTION
Banner Rotator	Can be used to display a single banner, or an assortment of banners in a series, random order, or shuffled. The banner can be triggered by price rules, and placed on a specific page and location, or configured to appear on all pages.
CMS Hierarchy Node Link	Displays a link to a specific node in the page hierarchy that can be incorporated into other content.
CMS Page Link	Displays a link to a specific CMS page. Allows you to specify custom text and title. When the link is complete, it can be used in content pages and blocks.
CMS Static Block	Displays a block of content at a specific location on a page.
Catalog Category Link	Displays either an inline or block-style link to a selected catalog category. When the link is complete, it can be used in content pages and blocks.
Catalog Events Carousel	Displays a list of upcoming catalog events.
Catalog New Products List	Displays a block of products which have been designated as new, for the duration of time specified in the product record.
Catalog Product Link	Displays either an inline or block-style link to a selected catalog product. When the link is complete, it can be used in content pages and blocks.
Catalog Products List	Displays a list of products from the catalog.
Gift Registry Search	Gives shoppers the ability to search for public gift registries by name or Registry ID.
Order by SKU	Order by SKU can be displayed in the store as a convenience for all shoppers, or made available only to those in specific customer groups. Shoppers can either enter the SKU and quantity information directly into the Order by SKU block, or upload a CSV file from their customer account.
Orders and Returns	Gives guests the ability to check the status of their orders and submit requests to return merchandise. The widget appears only for guests and customers who are not logged in to their accounts.
Recently Compared Products	Displays the block of recently compared products. You can specify the number of products included, and format them as a list or product grid.

Widgets (cont.)

TYPE	DESCRIPTION
Recently Viewed Products	Displays the block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.
Wish List Search	Gives customer the ability to search for publicly available wish lists by the name or email address of the wish list owner. Store customers can find wish lists that belong to other customers, view them and order products from them, or add the products to their own wish lists.

Creating a Widget

The process of creating a widget is nearly the same for each type. You can follow the first part of the instructions, and then complete the last part for the specific type of widget.



Widgets

Process Overview:

Step 1: Choose the Type

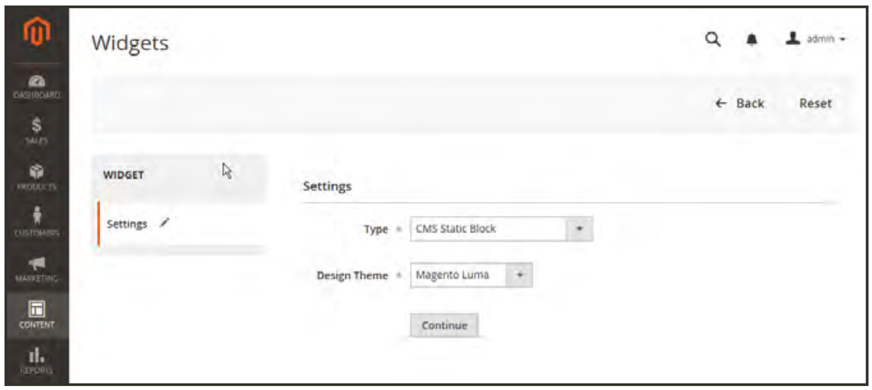
Step 2: Specify Where It Goes

Step 3: Complete the Options

Step 4: Check It Out!

Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. Tap **Add Widget**. Then, do the following;
   a. In the Settings section, set **Type** to the type of widget that you want to create. ”Then, tap **Continue**.
   b. Verify that **Design Theme** is set to the current theme.
3. Tap **Continue**.



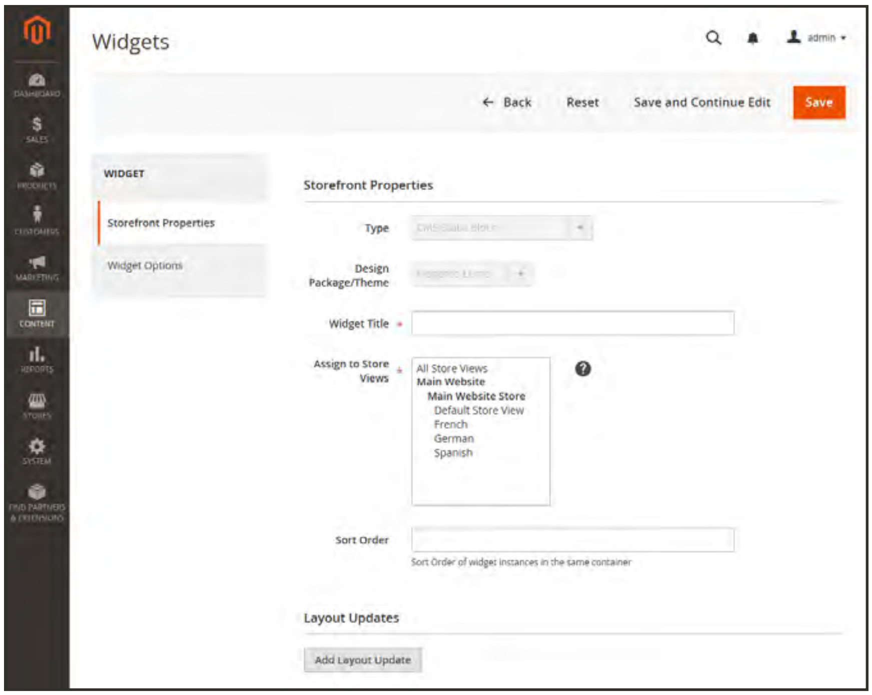
Widget Settings

4. Under **Storefront Properties**, do the following:

   a. In the **Widget Title** field, enter a descriptive title for internal reference only.

   b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.

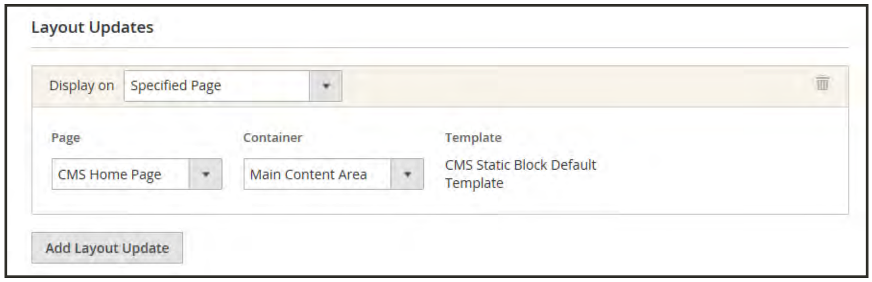
   c. Enter a number in the **Sort Order** field to determine the order of the block if it appears in the same location as other content elements. The top position is zero.



Storefront Properties

Step 2: Specify Where It Goes

1. In the Layout Updates section, tap **Add Layout Update**.
2. Set **Display On** to the type of page where it is to appear.
3. In the **Block Reference** list, choose the area of the page layout where it is to be placed.



Layout Updates

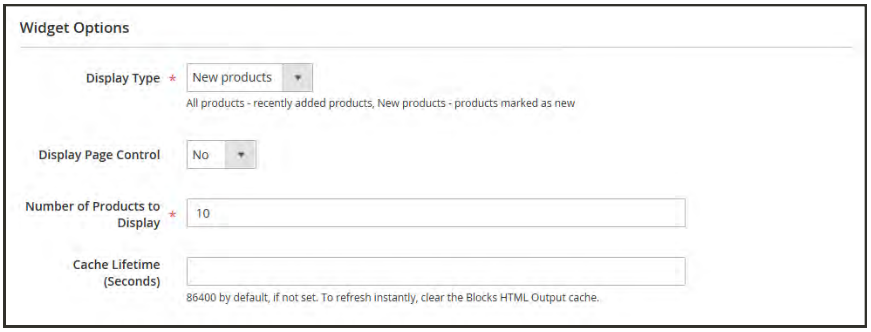
4. If the widget is a link, set **Template** to one of the following:

Block Template	Formats the content so it can be placed as standalone unit on the page.
Inline Template	Formats the content so it can be placed inside other content. For example, a link that goes inside a paragraph of text.

Step 3: Complete the Options

The options for each widget type vary slightly, but the process is essentially the same. The following example displays the product list for a specific category, with pagination controls.

1. In the panel on the left, choose **Widget Options**.
2. Tap **Select Block**.
3. Enter a **Title** to appear above the list. For example, "Featured Products."
4. For pagination controls, set **Display Page Control** to "Yes." Then, do the following:
   a. Enter the **Number of Products per Page**.
   b. Enter the total **Number of Products to Display**.
   c. Set **Condition** to the category of products to be featured. The process is the same as setting a condition for a price rule.



Widget Options

5. When complete, tap **Save**.

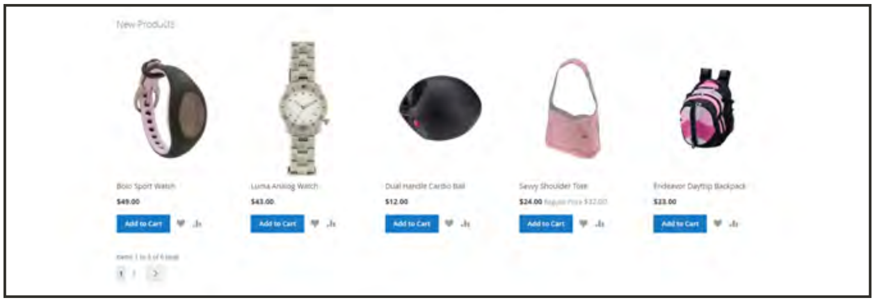
6. When prompted, follow the instructions at the top of the workspace to update the cache, as needed.

Step 4: Check It Out!

Return to your storefront to verify that the widget is working correctly. To move it to a different location, you can reopen the widget and try a different page or block reference.

New Products List

The list of new products is an example of dynamic content, and consists of live data that is pulled from your product catalog. By default, the “New Products” list includes the first eight of the most recently added products. However, it can also be configured to include only products within a specified date range.



New Products List on Home Page

Process Overview:

Step 1: Set the Date Range for Each Product

Step 2: Create the Widget

Step 3: Choose the Location

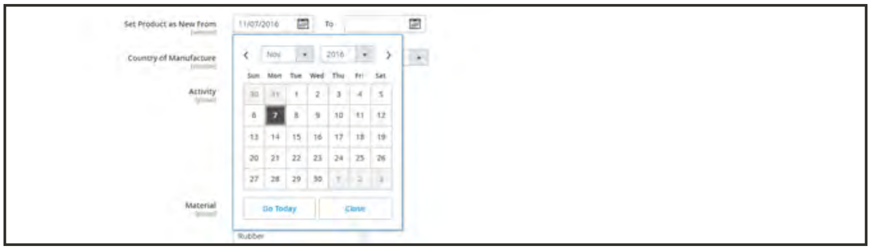
Step 4: Configure the List

Step 5: Preview Your Work

Step 1: Set the Date Range for Each Product

To make a product appear in the list by date range, the “New From” dates must be entered in the product. The product then appears in the New Products list during the date range specified.

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find each product that you want to feature, and open in edit mode. Then, do the following:
   a. In the **Set Product as New From** field, tap the calendar ( ). Then, choose the first date that you want the product to be featured.
   b. In the **To** field, tap the calendar ( ). Then, choose the last date that you want the product to be featured.



"Set Product As New " Date Range

3. When complete, tap **Save**.

4. When you are prompted to reindex and refresh the page cache, click the links at the top of the workspace, and follow the instructions.

   The list of products now appears on the Home Page for the specified date range.

Step 2: Create the Widget

The code that determines the content of the New Products list and its placement in your store is generated by the Widget tool.

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.

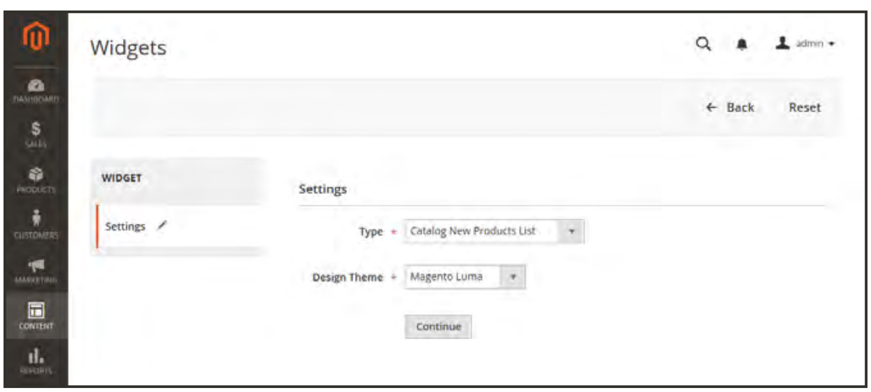
2. In the upper-right corner, tap **Add Widget**.

3. In the Settings section, do the following:

   a. Set **Type** to "Catalog New Products List."

   b. Choose the **Design Theme** that is used by the store.

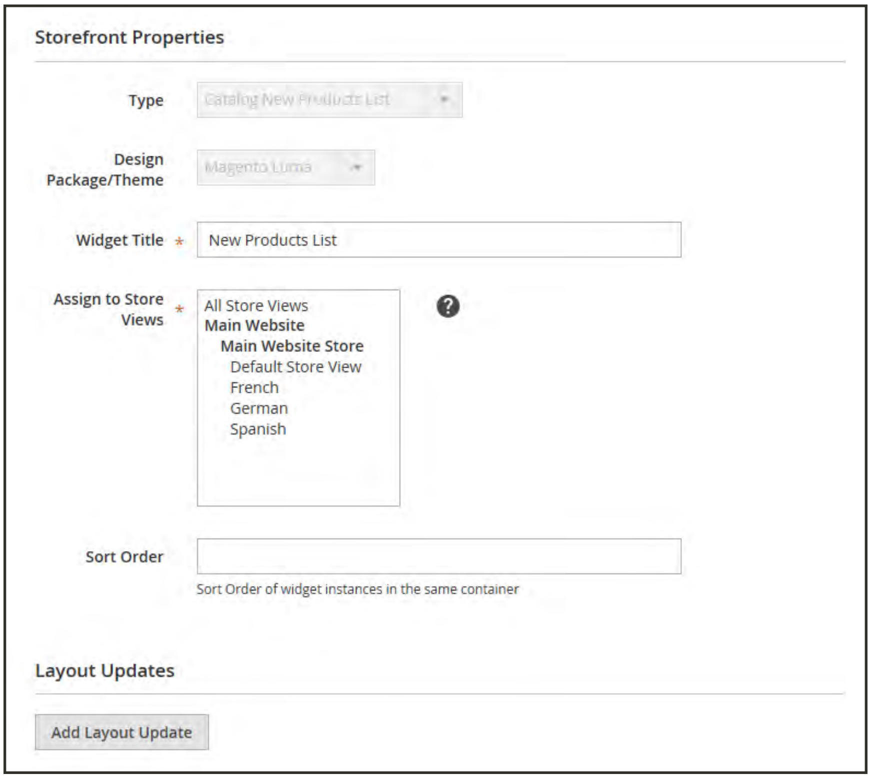
4. Tap **Continue**.



Widget Type

5. In the **Storefront Properties** section, complete the following fields:

Widget Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be visible. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the order this items appears with others in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)



Storefront Properties

Step 3: Choose the Location

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:

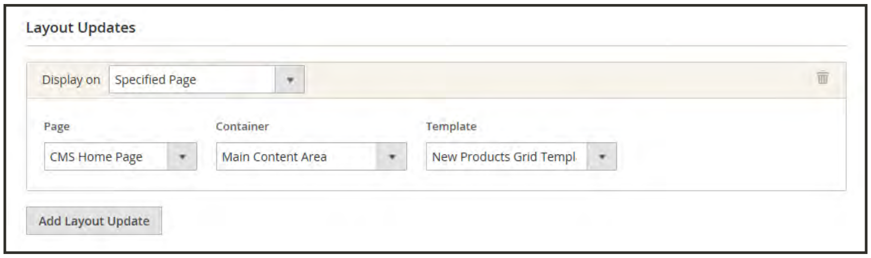
   a. Set **Display On** to “Specified Page.”

   b. Set **Page** to “CMS Home Page.”

   c. Set **Block Reference** to “Main Content Area.”

   d. Set **Template** to one of the following:

   - New Product List Template
   - New Products Grid Template



Layout Updates

2. Tap **Save and Continue Edit**.

   For now, you can ignore the message to refresh the cache.

Step 4: Configure the List

1. In the panel on the left, choose **Widget Options**. Then, do the following:

2. Set **Display Products** to one of the following:

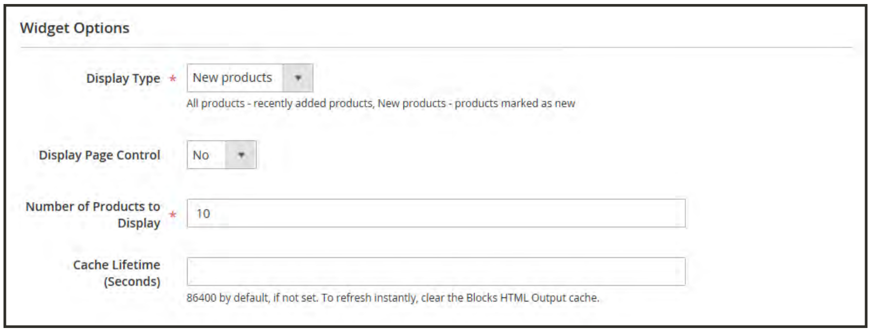
All Products	Lists products in sequence, starting with those most recently added.
New Products	Lists only the products which are identified as "New." A product is considered to be new during the date range that is specified in the "Set Product As New From/To" fields. The list will be empty if the date range expires without any new products defined.

3. Complete the remaining information as follows:

   a. To provide navigation control for lists with multiple pages, set **Display Page Control** to "Yes." Then, in the **Number of Products per Page** field, enter the number of products you want to appear on each page.

   b. Set **Number of Products to Display** to the number of new products that you want to include in the list. The default setting is 10.

   c. In the **Cache Lifetime (Seconds)** field, choose how often you want to refresh the list of new products. By default, the cache is set to 86400 seconds, or 24 hours.



Widget Options

4. When complete, tap **Save**.

5. When prompted to refresh the cache, click the link in the message at the top of the workspace, and follow the instructions.

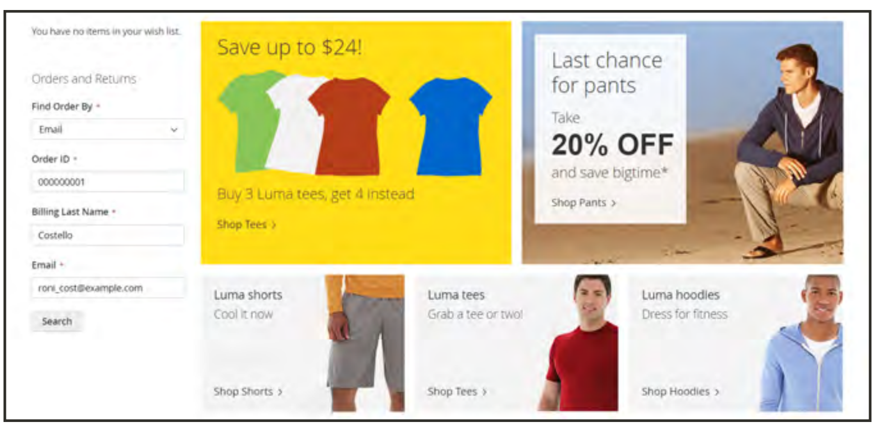
Step 5: Preview Your Work

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.

2. Find the page in the grid where the New Products list is to appear. Then, in the **Action** column, click the **Preview** link.

Orders and Returns Widget

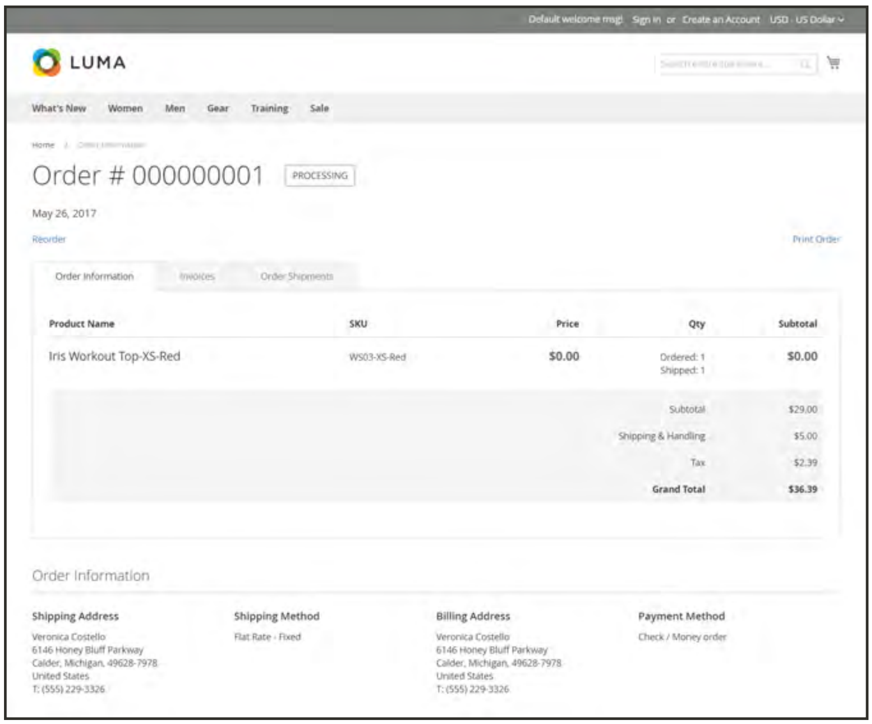
The Orders and Returns widget gives guests the ability to check the status of their orders, print invoices, and track shipments. When the widget is added to the storefront, it is visible only for guests and for customers who are not logged in to their accounts. Guests can find orders by providing the Order ID, Billing Last Name, and either the Email Address or ZIP Code.



Orders and Returns Widget in Sidebar

To use the Orders and Returns Widget:

1. Choose one of the following fields to be used to find the order:
   - Email Address
   - ZIP Code
2. Enter the **Order ID** and **Billing Last Name**. Then, enter either the billing **Email Address** or **ZIP Code** that is associated with the order.
3. Tap **Search** to retrieve the order.



Order Information

To set up the Orders and Returns widget:

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**.
3. In the Settings section, do the following:
   a. Set **Type** to “Orders and Returns”.
   b. Choose the **Design Theme** that is used by the store.
4. Tap **Continue**.
5. In the **Storefront Properties** section, complete the following fields:

Widget Title	Enter a descriptive title for your widget. This title is visible only from the Admin.
Assign to Store Views	Select the store views where the widget will be available. You can select a specific store view, or "All Store Views."
Sort Order	(Optional) Enter a number to determine the relative order of this item when it appears with other content in the same part of the page. (0 = first, 1 = second, 3= third, and so on.)

6. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
   a. Set **Display On** to the type of page where the widget is to appear.
   b. Complete the rest of the layout update information to determine where the widget is to appear on the page.
7. When complete, tap **Save**. Then when prompted, refresh each invalid cache.

Design & Theme

Contents

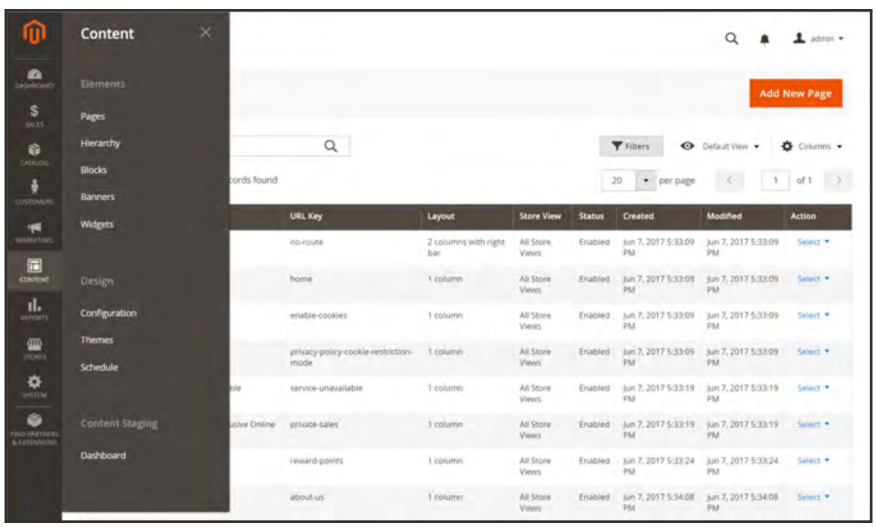
Your store's theme is like a window dressing that can be changed for a season or promotion. In this section, you will learn about page layouts, how to make simple HTML changes, and apply a new theme to your store.

CHAPTER 48:

Design Menu

Magento provides a variety of easy-to-use design options that you can use to make simple changes to your store. In addition, you will find many professionally designed themes available on Magento Connect. Like the window dressing of your store, you can change the theme for the season or for a promotion.

More advanced users appreciate the flexibility of working with an object-oriented environment that assembles pages from separate components. After you understand the basics, you'll appreciate working in such a flexible and fluid environment. To learn more, see the Frontend Developer Guide.

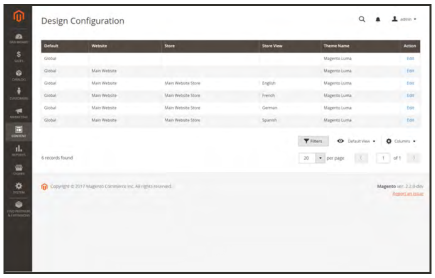


Design Menu

To display the Design menu:

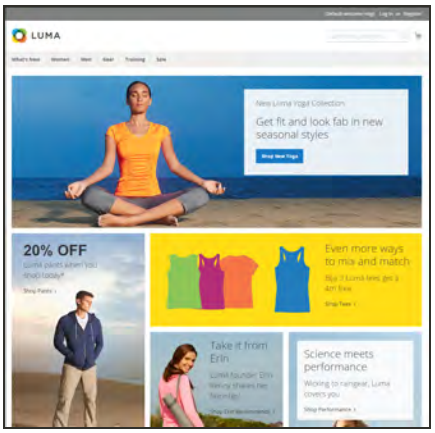
On the Admin sidebar, tap **Content**. The Design options are part of the Content menu.

Menu Options



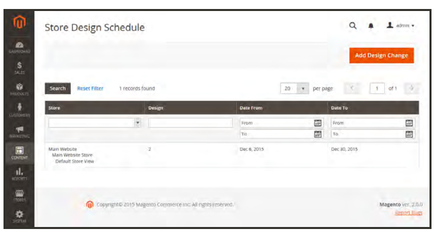
Configuration

The Design configuration lets you easily maintain different settings for each website, store, and view in your Magento installation.



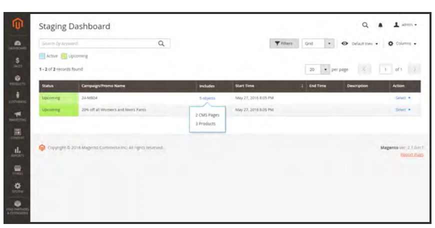
Themes

The theme determines the visual presentation of your store, and consists of a collection of layout files, template files, translation files, and skins.



Schedule

Themes can be activated for a period of time, according to a schedule. Use the schedule to plan theme changes in advance for a season or promotion.

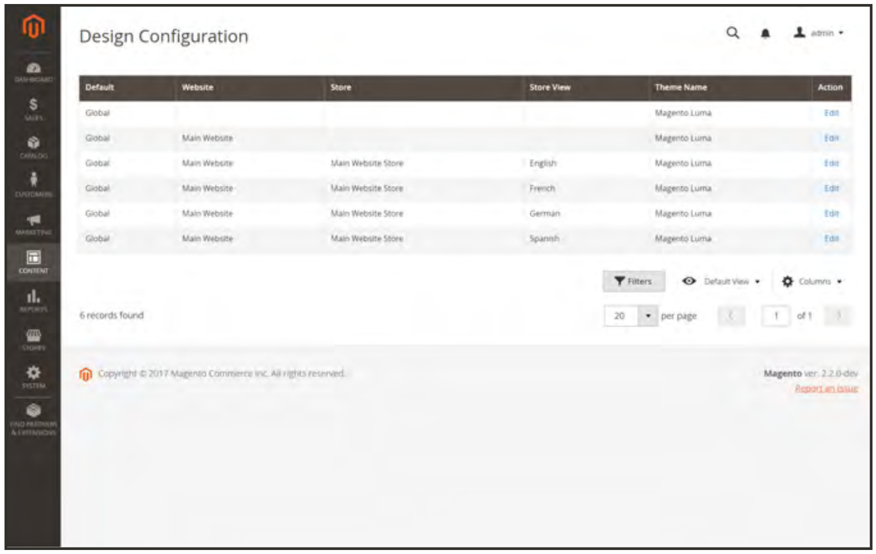


Staging

Content Staging gives your business team the ability to easily create, preview, and schedule a wide range of content updates directly from the Admin of your store.

Design Configuration

The Design Configuration makes it easy to edit design-related rules and configuration settings by displaying the settings on a single page.



Design Configuration

To edit the design configuration:

1. On the Admin menu, tap **Content**. Then under **Design**, choose **Configuration**.

2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.

   The page displays the current design settings for the store view.

3. To change the Default Theme, set **Applied Theme** to the theme that you want to apply to the view.

   If no theme is specified, the system default theme is used. Some third-party extensions modify the system default theme.

4. If the theme is to be used for only a specific device, do the following:

   a. Under **Design Rule** section under **User Agent Rules**, tap **Add New User Agent Rule**.

   b. In the **Search String** column, enter the browser ID for the specific device.

   c. A search string can be either a normal expression or Perl Compatible Regular Expression (PCRE). To learn more, see: User Agent. The following search string identifies Firefox:

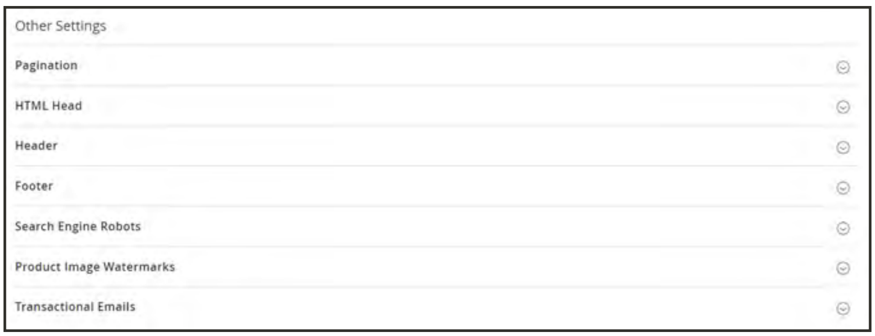
   ```
   /^mozilla/i
   ```

   d. In the **Theme Name** column, choose the theme that is to be used for the specified device.

User-Agent Rules

e. Repeat the process to enter additional devices. Search strings are matched in the order they are entered.

5. Under **Other Settings**, expand each section. Then, follow the instructions in the linked topics to edit the settings as needed.



Edit Design Configuration

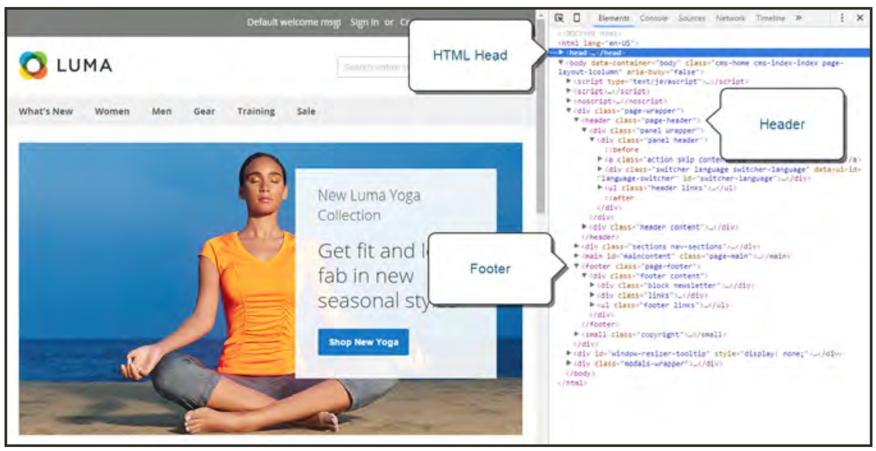
- Pagination
- HTML Head
- Header
- Footer
- Search Engine Robots
- Product Image Watermarks
- Transactional Emails

6. When complete, tap **Save Configuration**.

CHAPTER 49:

Page Setup

The main sections of the page are controlled, in part, by a set of standard HTML tags. Some of these tags can be used determine the selection of fonts, color, size, background colors, and images that are used in each section of the page. Other settings control page elements such as the logo in the header, and the copyright notice in the footer. The Page Setup sections correspond to the underlying structure of the HTML page, and many of the basic properties can be set from the Admin.



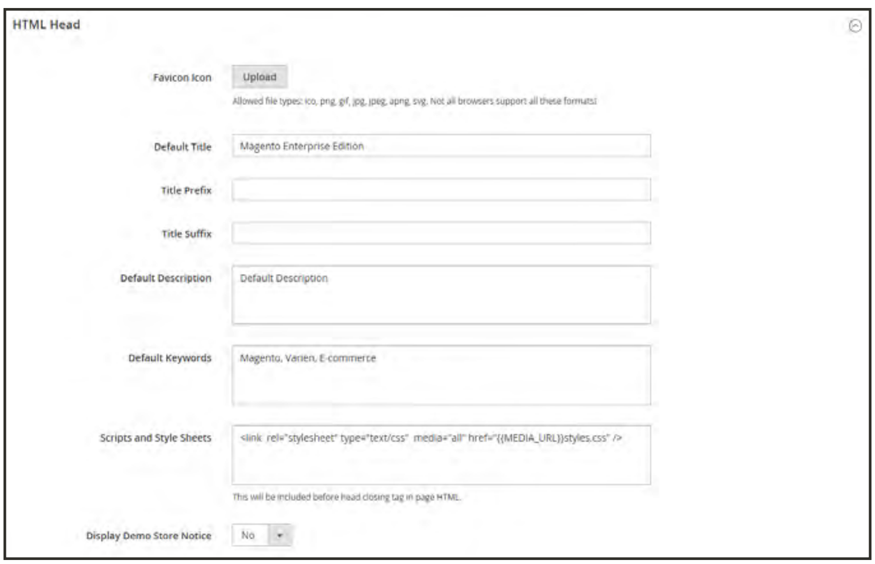
HTML Page Sections

HTML Head

The settings in the HTML Head section correspond to the `<head>` tag of an HTML page, and can be configured for each store view. In addition to meta data for the page title, description, and keywords, the section includes a link to the favicon, and miscellaneous scripts. Instructions for search engine robots and the display of the store demo notice are also configured in this section.

To configure the HTML Head:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand the **HTML Head** section.
4. Update the fields as needed. (See the following Field Descriptions for more information about each item.)
5. When complete, tap **Save Config**.



HTML Head

Field Descriptions

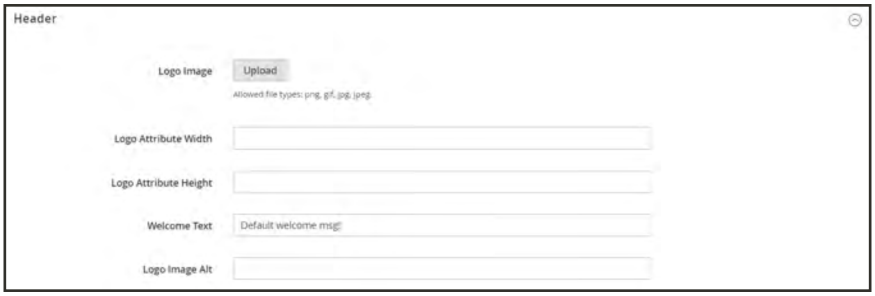
FIELD	SCOPE	DESCRIPTION
Favicon Icon	Store View	Uploads the small graphic image that appears in the address bar and tab of the browser. Allowed file types: ICO, PNG, APNG, GIF, and JPG (JPEG). Not all browsers support these formats.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Default Page Title	Store View	The title that appears at the title bar of each page when viewed in a browser. The default title is used for all pages, unless another title is specified for individual pages.
Page Title Prefix	Store View	A prefix can be added before the title to create a two- or three-part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Page Title Suffix	Store View	A suffix can be added after the title to create a two-or three part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Default Meta Description	Store View	The description provides a summary of your site for search engine listings and should not be more than 160 characters in length.
Default Meta Keywords	Store View	A series of keywords that describe your store, each separated by a comma.
Scripts and Style Sheets	Store View	Contains scripts that must be included in the HTML before the closing `<head>` tag. For example, any third-party JavaScript that must be placed before the <body> tag can be entered here.
Display Demo Store Notice	Store View	Controls the display of the demo store notice at the top of the page. Options include: Yes / No

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 **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand the **Header** section.
4. Make any changes necessary to the logo and welcome message settings.
5. When complete, tap **Save Config**.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Logo Image	Store View	Identifies the path to the logo that appears in the header. Supported file types: PNG, GIF, JPG (JPEG)
Logo Attribute Width	Store View	The width of your logo image in pixels.
Logo Attribute Height	Store View	The height of your logo image in pixels.
Welcome Text	Store View	The welcome message appears in the header of the page and includes the name of customers who are logged in.
Logo Image Alt	Store View	The Alt text that is associated with the logo.

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 **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.
3. Under **Other Settings**, expand the **Footer** section.
4. Make any changes necessary to the **Copyright** and **Miscellaneous HTML** settings.
5. When complete, tap **Save Config**.

Field Descriptions

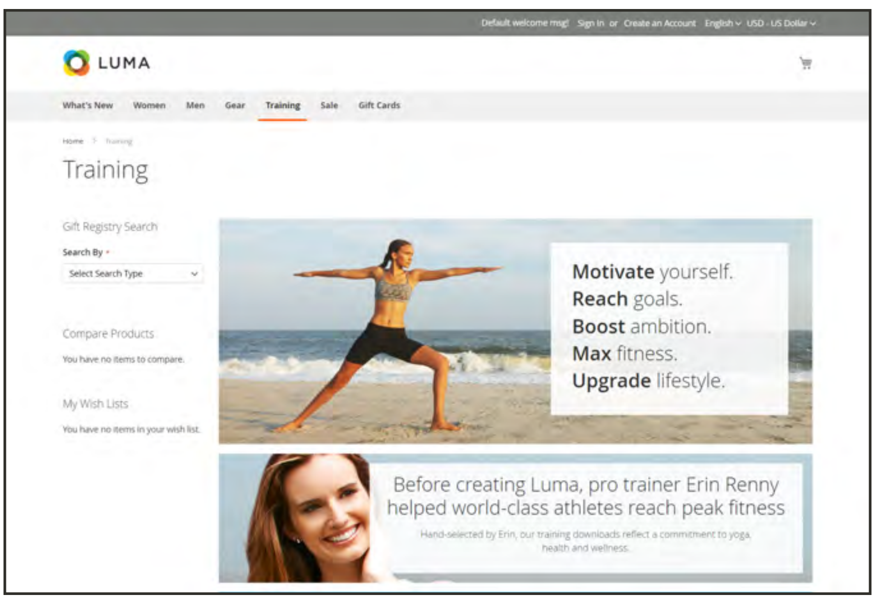
FIELD	SCOPE	DESCRIPTION
Copyright	Store View	The copyright statement that appears at the bottom of each page. To include the copyright symbol, use the HTML character entitym `©` as follows: `©` 2014 Magento Demo Store. All Rights Reserved. Make sure to replace the sample copyright notice with your own.
Miscellaneous HTML	Store View	An input box where you can upload miscellaneous scripts to the server that must be placed just before the closing `<body>` tag.

CHAPTER 50:

Page Layout

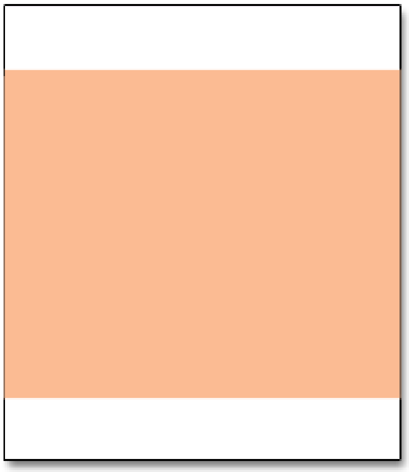
The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the “floor plan” of the page.

Content blocks float to fill the available space, according to the section of the page layout where they are assigned to appear. You will discover that if you change the layout from a three-column to a two-column layout, the content of the main area expands to fill the available space, and any blocks that are associated with the unused side bar seem to disappear. However, if you restore the three-column layout, the blocks reappear. This fluid approach, or liquid layout, makes it possible to change the page layout without having to rework the content. If you are used to working with individual HTML pages, you will discover that this modular, “building block” approach requires a different way of thinking.



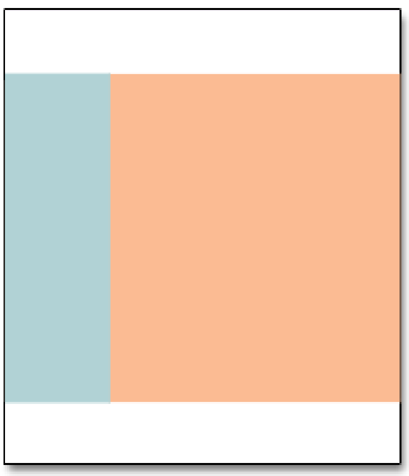
Two Column Page Layout

Standard Page Layouts



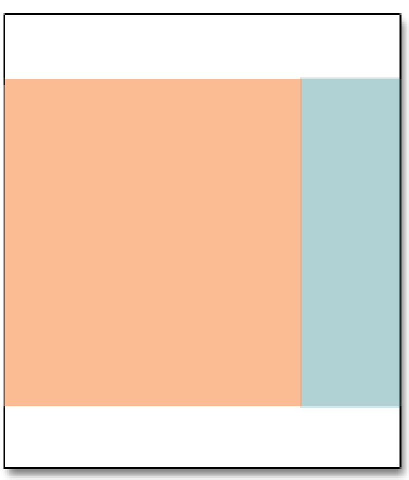
1 Column

The “1 Column” layout can be used to create a dramatic home page with a large image or focal point. It’s also a good choice for a landing page, or any other page that has a combination of text, images, and video.



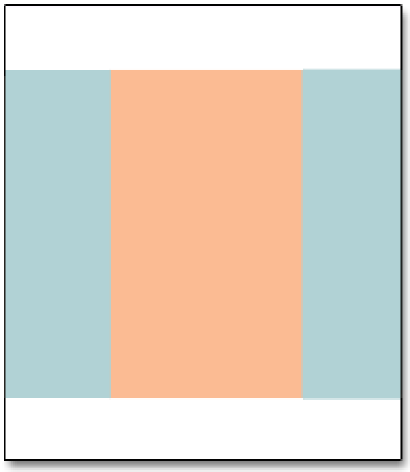
2 Columns with Left Bar

The “2 Columns with Left Bar” layout is often used for pages with navigation on the left, such as a catalog or search results pages with layered navigation. It is also an excellent choice for home pages that need additional navigation or blocks of supporting content on the left.



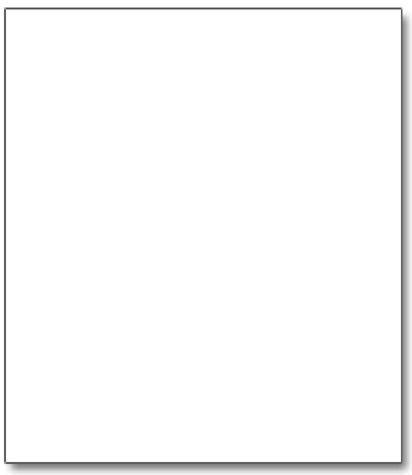
2 Columns with Right Bar

With a “2 Columns with Right Bar” layout, the main content area is large enough for an eye-catching image or banner. This layout is also often used for Product pages with blocks of supporting content on the right.



3 Columns

The “3 Column” layout has a center column that is wide enough for the main text of the page, with room on each side for additional navigation and blocks of supporting content.



Empty

The “Empty” layout can be used to define custom page layouts. To learn more, see the Magento Designer’s Guide.

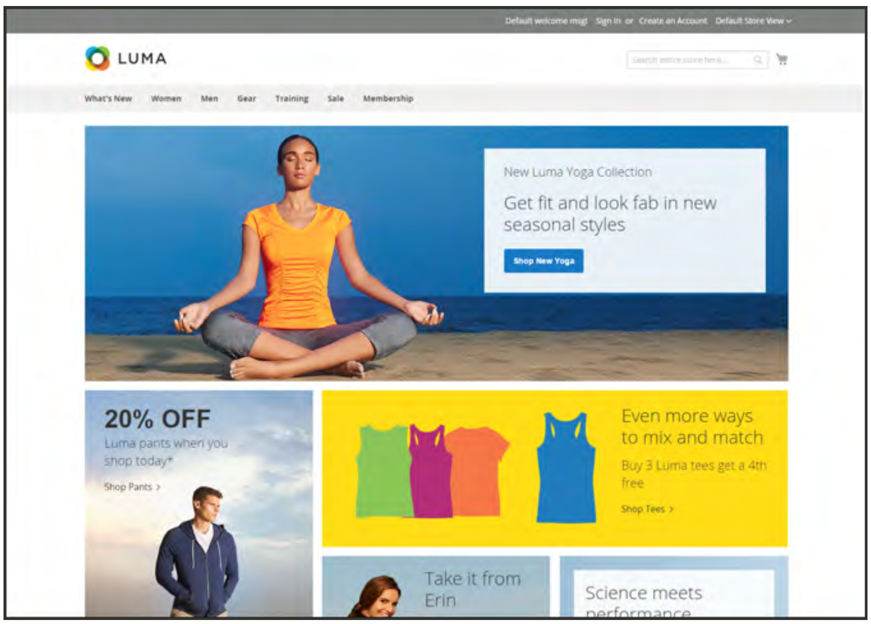
Storefront Examples

The column dimensions are determined by style sheet of the theme. Some themes apply a fixed pixel width to the page layout, while others use percentages to make the page respond to the width of the window or device.

Most desktop themes have a fixed width for the main column, and all activity takes place within this enclosed area. Depending on your screen resolution, there is empty space on each side of the main column.

1 Column Layout

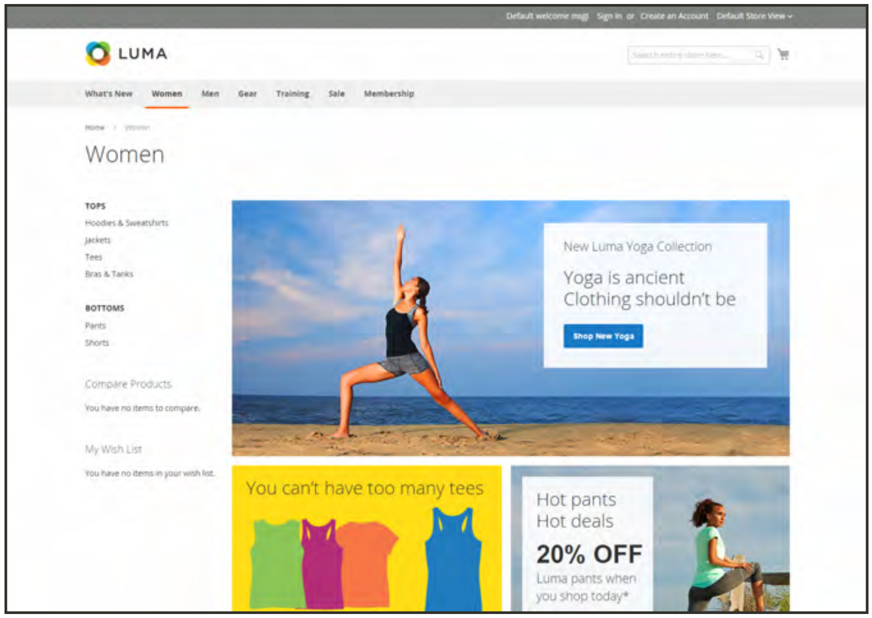
The content area of a “1 Column” layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.



1 Column Layout

2 Columns with Left Bar

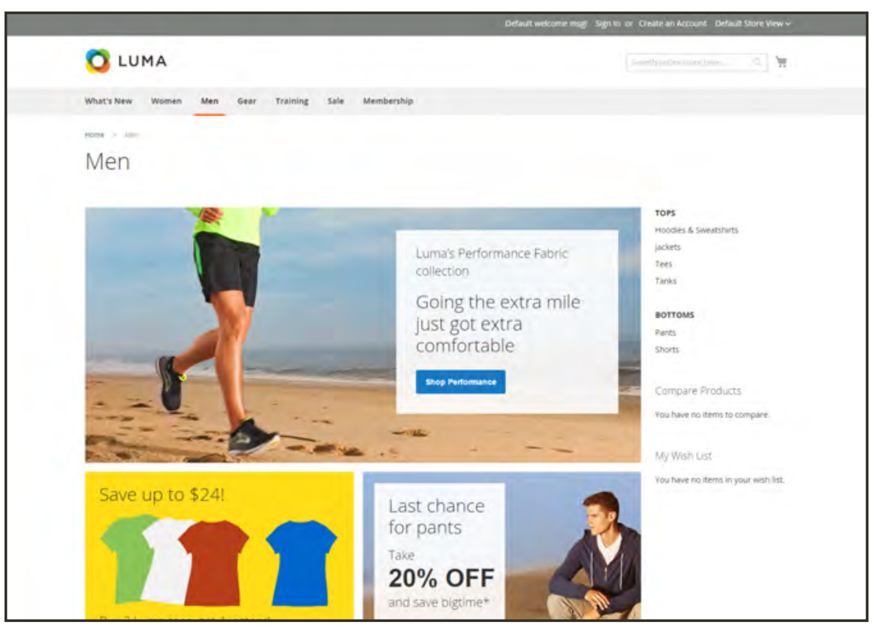
The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.



2 Columns Left Bar

2 Columns with Right Bar

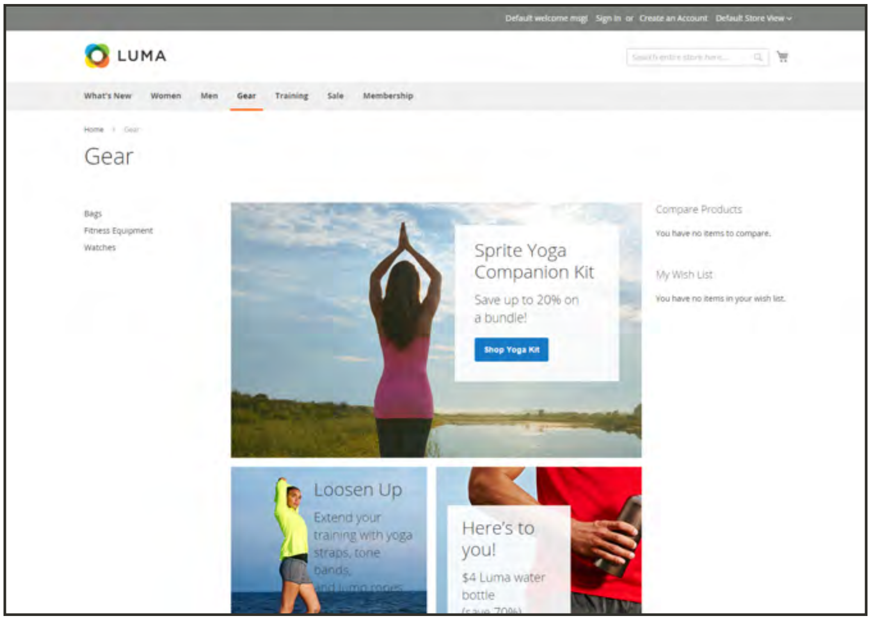
This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.



2 Columns Right Bar

3 Columns

A 3-column layout has a main content area with two side columns. The left side bar and main content column are wrapped together, and float as a unit to the left. The other side bar floats to the right.



3 Columns

Layout Updates

Before you begin working with custom layout updates, it is important to understand how the pages of your store are constructed, and the difference between the terms layout and layout update. The term layout[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 Commerce store is a hierarchical structure of blocks. Some elements appear on every page, and others appear only on specific pages. You can see how these structural blocks are referenced by examining the layout update code for your home page. To do so, simply open your home page in edit mode, and choose the Design tab to view the Page Layout section. Depending on the theme, it might contain instructions to remove blocks, unset blocks, and add blocks by referencing specific areas of the page layout.

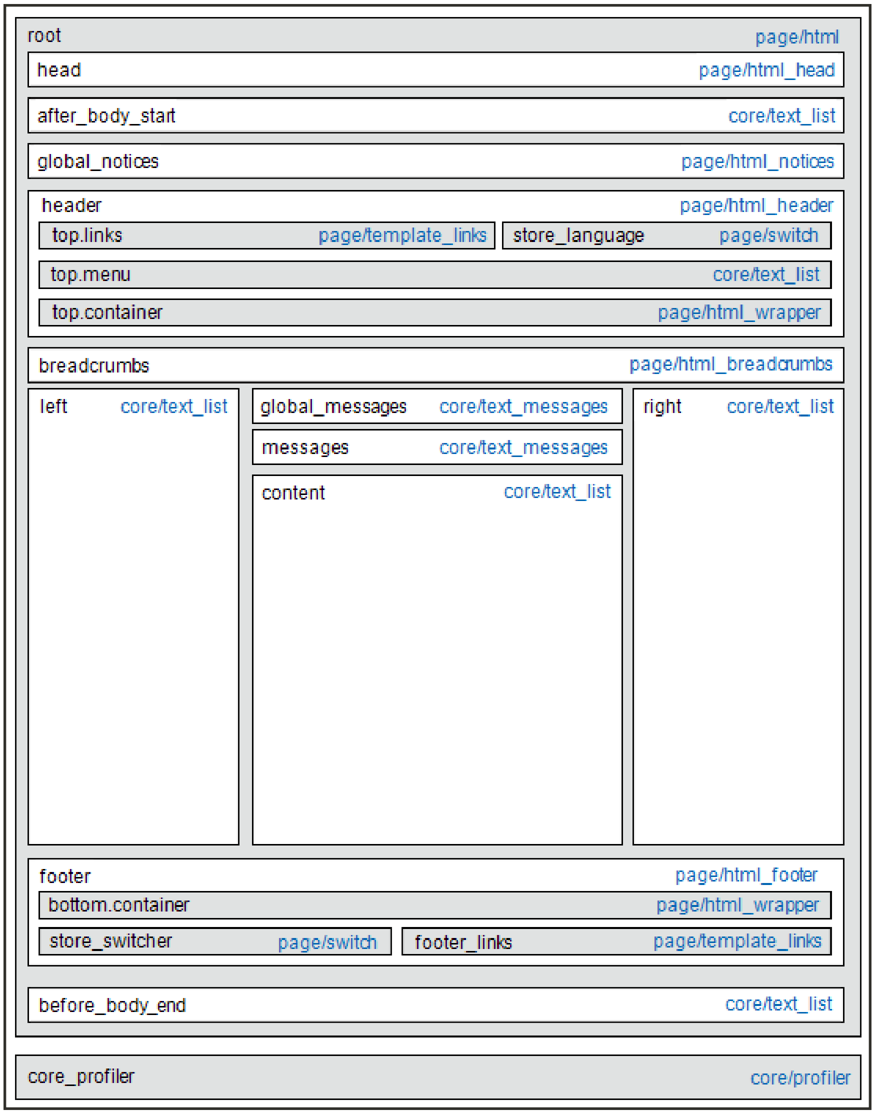
In many cases, the same result can be achieved with the Widget tool. To place a block of content as a widget, you must identify the page, and the location on the page where you want the block to appear. You can use the Widget tool to place a block on most any page in your store, including the home page and all content pages. However, to place a block in the sidebar of a specific page, you must make the change by entering code as a layout update.

[1] The visual and structural composition of a page.

[2] A specific set of XML instructions that determines how the page is constructed.

Standard Block Layout

In the following diagram, the block names that can be used to refer to a block in the layout are black, and the block types, or block class paths, are blue.



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.
`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.

Block Descriptions (cont.)

BLOCK TYPE	DESCRIPTION
`core/text_list`	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
`core/profiler`	There is only one instance of this type of block per page. It is used for the internal Magento profiler, and should not be used for any other purpose.

Layout Update Examples

The following blocks types can be manipulated with custom layout instructions. Each action must be specified using the full syntax of the instruction. In the following examples, a simplified notation is used to refer to each action, which corresponds to the full syntax of the instruction.

Full Syntax

```
?

<!-- Action can be specified inside either a <block>

or <reference> instruction. -->

           <action method="someActionName">

                <arg1>Value 1</arg1>

                <arg2>Value 2</arg2>

                <!--   -->

                 <argN>Value N</argN>

        </action>

<!--   -->
```

Simplified Syntax

```
?

someActionName($arg1, $arg2, ..., $argN)
```

page/template_links

Syntax

ACTION	DESCRIPTION
`addLink($label, $url, $title, $prepare`	
	Adds another link to the end of the list of existing links. Just specify the `$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

Syntax (cont.)

NAME	VALUE
	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.

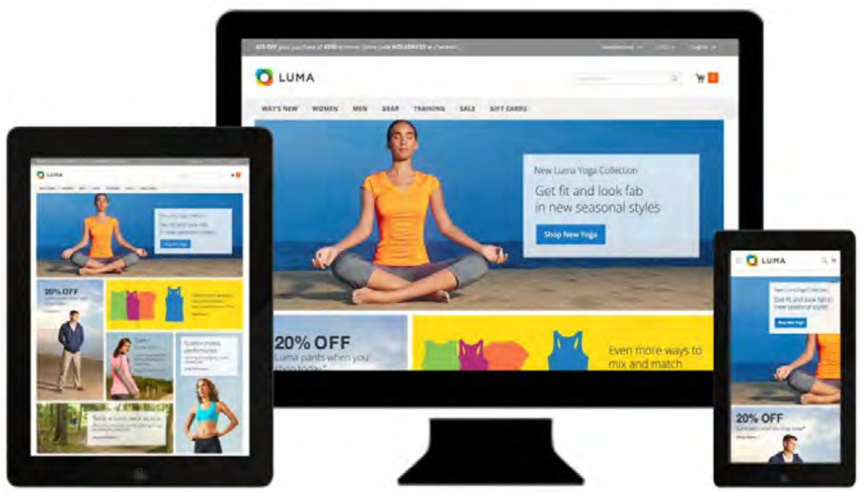
CHAPTER 51:

Themes

A theme is a collection of files that determines the visual presentation of your store. When you first install Magento Commerce, the design elements of the store are based on the “Default” Theme. In addition to the initial default theme that comes with your Magento installation, there is a wide variety of themes that are available “off the shelf” on Magento Connect.

A responsive theme adjusts the page layout to fit the view port of the device. Magento’s sample “Luma” theme has a flexible, responsive layout that can be viewed from the desktop, tablet, or mobile device.

Magento themes include layout files, template files, translation files, and skins. A skin is a collection of supporting CSS, images, and JavaScript files that together, create the visual presentation and interactions that your customers experience when they visit your store. Themes and skins can be modified and customized by a developer or designer who has knowledge of Magento theme design and access to your server. To learn more, see the Frontend Developer Guide.



Luma Theme

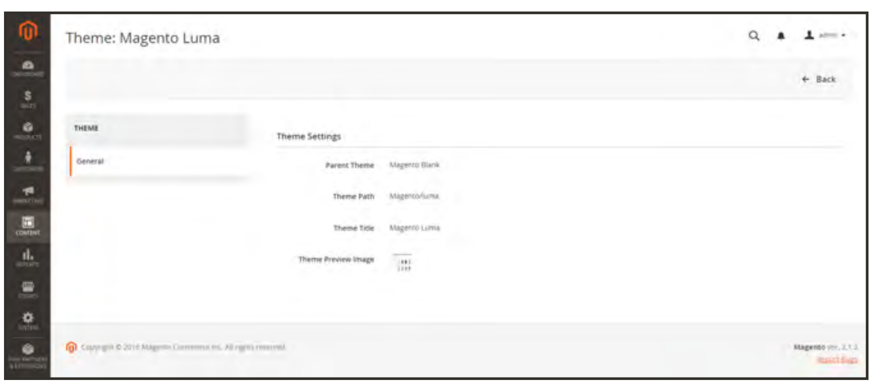
Using the Default Theme

Magento’s default responsive theme renders the display of your storefront for different devices, and incorporates best practices for desktop, table, and mobile devices. Some themes are designed to be used only with specific devices. When Magento detects a specific browser ID, or user agent, it uses the theme that is configured to be used for the specific browser. The search string can also include Perl-Compatible Regular Expressions (PCRE). To learn more, see: User Agent.

Themes

To view the current theme settings:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Themes**.
2. In the list of installed themes, find the theme that you want to examine, and click the row to display the settings.
3. To view a sample page, tap the **Theme Preview Image**.

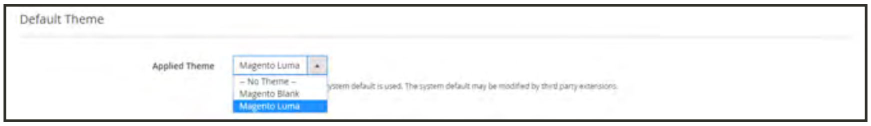


Preview Theme

To apply a theme:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Configuration**.
2. Find the store view that you want to configure. Then in the **Action** column, click **Edit**.

3. Under **Default Theme**, set **Applied Theme** to the one that you want to use for the current view.



Applied Theme

To add a user agent rule:

1. Under **Design Rule**, tap **Add New User Agent Rule**. Then, do the following:

Design Rule

   a. In the **Search String** field, enter the browser ID for the specific device. For example:

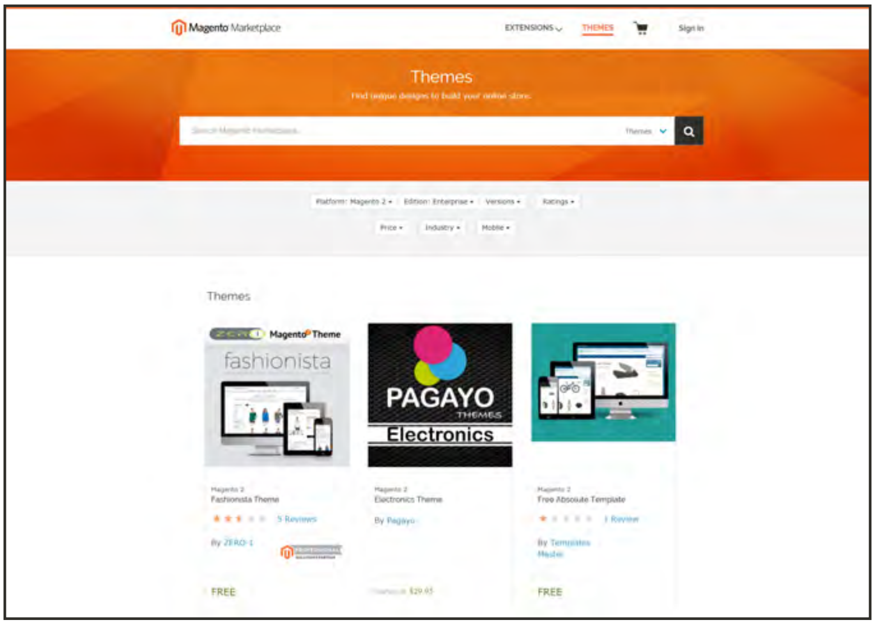
      Search strings are matched in the order they are entered. For example, for Firefox enter: `/^mozilla/i`

   b. Repeat the process to enter additional devices.

2. When complete, tap **Save Config**.

Installing a New Theme

When you first install Magento, the design elements of the store are based on the “Default” theme. The Luma theme is also available if you installed the sample data. You can modify a theme, add themes created by others, or create new ones. Magento Marketplace contains a growing selection of themes that you can install to change the appearance of your store. To learn how to create or modify a theme, see the Frontend Developer Guide.



Magento Marketplace

To install a new theme:

1. Before you begin, make sure that you have a valid set of Magento 2 Access Keys.

2. Follow the steps outlined in the Marketplace Quick Tour, to:

   - Find a Theme
   - Evaluate the Product
   - Make a Purchase
   - Download the Software
   - Install the Theme

3. To apply the theme to your store, see: Using the Default Theme,

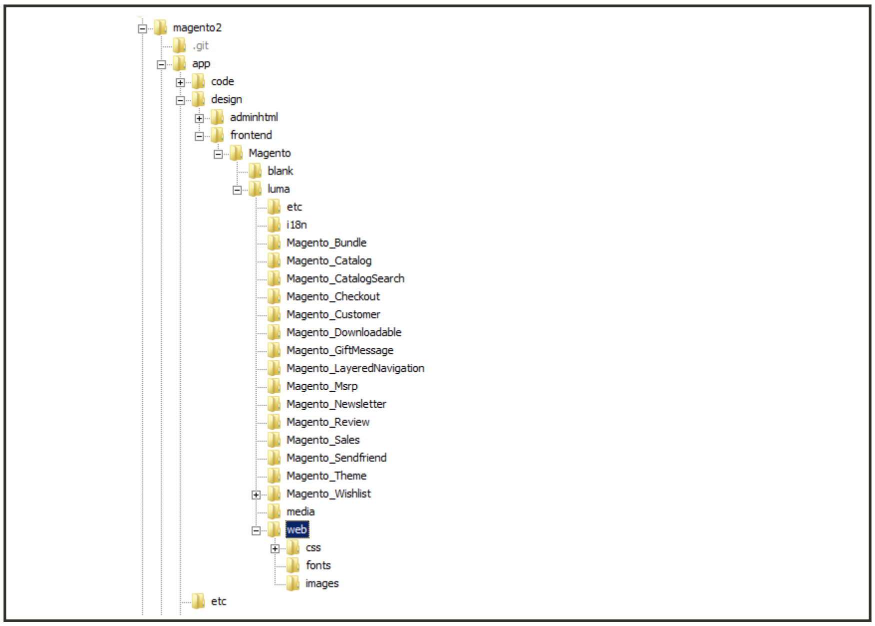
Theme Assets

The term static files[1] refers to the collection of assets, such as CSS, fonts, images, and JavaScript, that is used by a theme. The location of static files is specified in the Base URL configuration.

A digital signature can be added to the URL of each static file to make it possible for browsers to detect when a newer version is available. The newer version of the file is used if the signature differs from what is stored in the browser's cache.

For a standard installation, the assets associated with a theme are organized in the web folder at the following location below the Magento root.

```
[magento_root]/app/design/frontend/Magento/[theme_name]/web
```



Theme Assets

[1]The collection of assets, such as CSS, fonts, images, and JavaScript that is used by a theme.

To sign static files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Static Files Settings** section.

Static Files Settings

4. Set **Sign Static Files** to "Yes."
5. When complete, tap **Save Config**.

FILE TYPE	DESCRIPTION
CSS	Directory that contains the CSS files that control the visual styling that is associated with the skin. Example location on server: `[magento]/app/design/frontend/Magento/[theme]/web/css`
Fonts	Directory that contains the fonts that are available to be used by the theme. Location on server: `[magento]/app/design/frontend/Magento/[theme]/web/fonts`
Images	Directory that contains all images used by the theme, including buttons, background textures, and so on. Example location on server: `[magento]/app/design/frontend/Magento/[theme]/web/images`
JS	Directory that contains theme-specific JavaScript routines and callable functions. Example location on server: `[magento]/app/design/frontend/Magento/[theme]/web/js`

Merging CSS Files

As part of an effort to optimize your site and reduce page load time, you can reduce the number of separate CSS files by merging them into a single condensed file. If you open a merged CSS file, you'll find one continuous stream of text, with line breaks removed. Because you can't edit the merged file, it's best to wait until you are out of the development mode, and no longer making frequent changes to the CSS.

CSS files can be merged only when working in Developer Mode.

To merge CSS files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **CSS Settings** section.

CSS Settings

4. Set **Merge CSS Files** to "Yes."
5. When complete, tap **Save Config**.

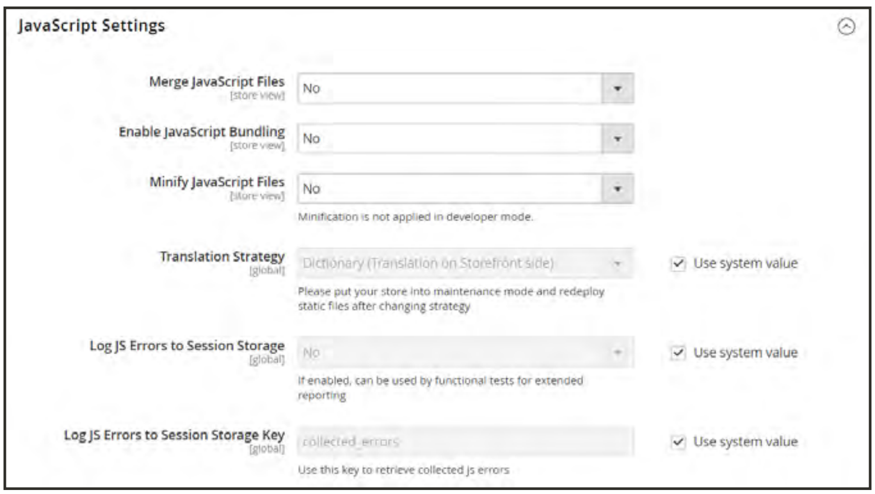
Merging JavaScript Files

Multiple JavaScript files can be merged into a single, condensed file to reduce page load time. If you open a merged JavaScript file, you'll find one continuous stream of text, with line breaks removed. If you are finished with the development process, and the code contains no errors, you might consider merging the files.

> JavaScript files can be merged only when working in Developer Mode.

To merge JavaScript files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **JavaScript Settings** section.

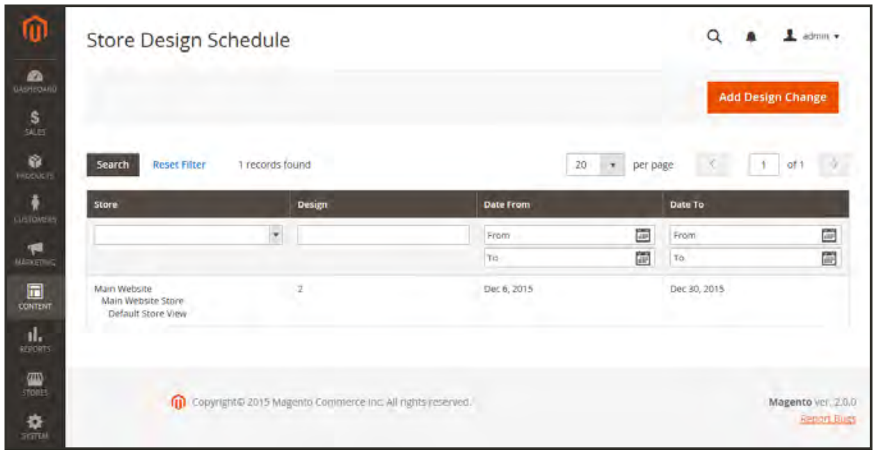


JavaScript Settings

4. Set **Merge JavaScript Files** to "Yes."
5. When complete, tap **Save Config**.

Scheduling Design Changes

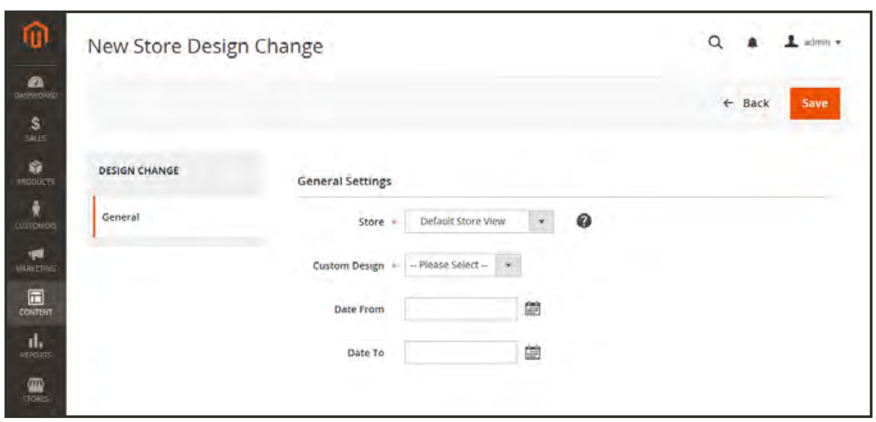
Design changes can be scheduled in advance, so they go into effect on schedule. You can use scheduled design changes for seasonal changes, promotions, or just to add variation.



Store Design Schedule

To schedule a design change:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Schedule**.
2. Tap **Add Design Change**. Then under General Settings, do the following:



New Design Change

   a. Set **Store** to the view where the change applies.

   b. Set **Custom Design** to the theme, or variation of a theme, that is to be used.

   c. To define the period when the change is in effect, use the calendar ( ) to choose the values for the **Date From** and **Date To** fields.

3. When complete, tap **Save**.

CHAPTER 52:

Content Staging

Content Staging gives your business team the ability to easily create, preview, and schedule a wide range of content updates directly from the Admin of your store. For example, rather than thinking in terms of a static page, consider a page to be a collection of different elements that can be turned "on" or "off" according to schedule. You can use Content Staging to create a page that changes automatically throughout the year on schedule.

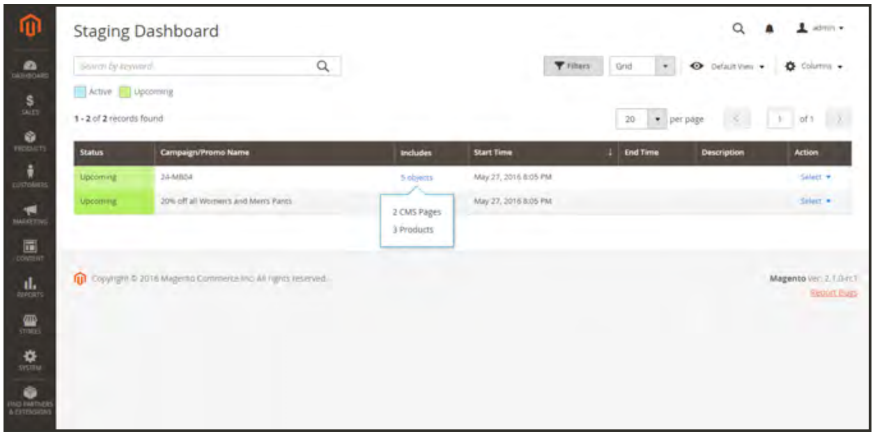
The term “campaign” refers to the record of a scheduled change—or collection of changes—that might be viewed on a calendar or timeline, and managed from the Staging Dashboard. The term “scheduled change” and “scheduled update” are interchangeable, and refer to a single change.

When you schedule a content change for a specific period of time, the content reverts to the previous version when the scheduled change expires. You can create multiple versions of the same baseline content to be used for future updates. You can also step back through the timeline to view previous versions of the content. To save a draft version, simply assign a date on the timeline that is so far into the future that it will never go into production.

When any of the following content assets are created, an corresponding campaign is set up as a placeholder, and the Scheduled Changes box appears across the top of the page. The placeholder campaign has a start date, but not an end date. You can schedule updates to the content as part of a campaign, and then preview and share the changes by date, time, or store view.

- Products
- Categories
- Catalog Price Rules
- Cart Price Rules
- CMS Pages
- CMS Blocks
- Widgets

The Staging Dashboard provides visibility into all planned site changes and updates. Any day, range of dates, or time period of a campaign can be previewed, and shared with others.



Content Staging Dashboard

Content Staging Workflow

1. **Create the baseline content.** The baseline is the content of an asset without a campaign, and includes everything below the Scheduled Changes section at the top of the page. The baseline content is always used, unless there is an active campaign with changes scheduled for that place on the timeline.

2. **Create the first campaign.** Create your first campaign with the start and end dates as needed. To make the campaign open-ended, leave the End Date blank. When the first campaign ends, the original baseline content is restored.

3. **Add a second campaign.** Create the second campaign, with the start and end dates as needed. The second campaign can be assigned to an entirely different time period. When creating multiple campaigns for the same asset, the campaigns cannot overlap. You can create as many campaigns as needed.

4. **Restore the baseline content.** If all campaigns have end dates, the baseline content is restored whenever all active campaigns end.

Scheduling an Update

The following example shows how to schedule a temporary price change for a product. You will learn how to schedule and preview changes, and also how to view scheduled updates on the calendar. Although this example includes only a single change, a campaign might include multiple changes to products, price rules, CMS pages, and other entities that are scheduled to take place at the same time.

To schedule an update to a product:

1. From the **Catalog** grid, open a product in edit mode.
2. In the **Scheduled Changes** box at the top of the page, tap **Schedule New Update**.

3. With the **Save as a New Update** option selected, do the following:
   a. In the **Update Name** field, enter a name for the new content staging campaign.
   b. Enter a brief **Description** of the update and how it is to be used.
   c. Use the Calendar ( ) to choose the **Start Date** and **End Date** for the campaign.

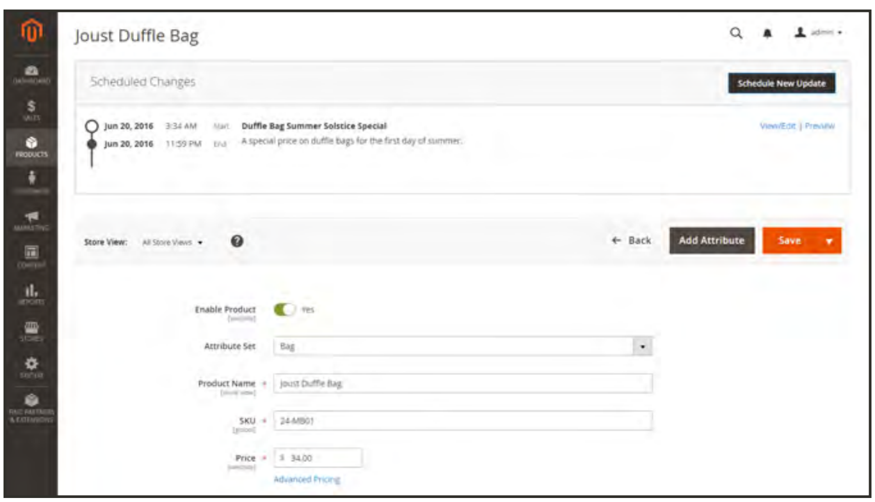
   To create an open-ended campaign, leave the End Date blank. For this example, the campaign is scheduled to begin the minute the sun reaches the northernmost point of the equator. This year, the summer solstice takes place on June 20th, at 3:34 AM PST.

   An end date cannot later be added to a price rule campaign that was originally created without an end date. In such a case it is necessary to create a duplicate campaign that includes the end date that is needed

Scheduling a Product Update

4. Scroll down to the **Price** field, and click **Advanced Pricing**.
5. Enter a **Special Price** for the product during the scheduled campaign. Then, tap **Done**.
6. When complete, tap **Save**.

   The scheduled change appears at the top of the product page, with the start and end dates of the campaign.



Scheduled Change

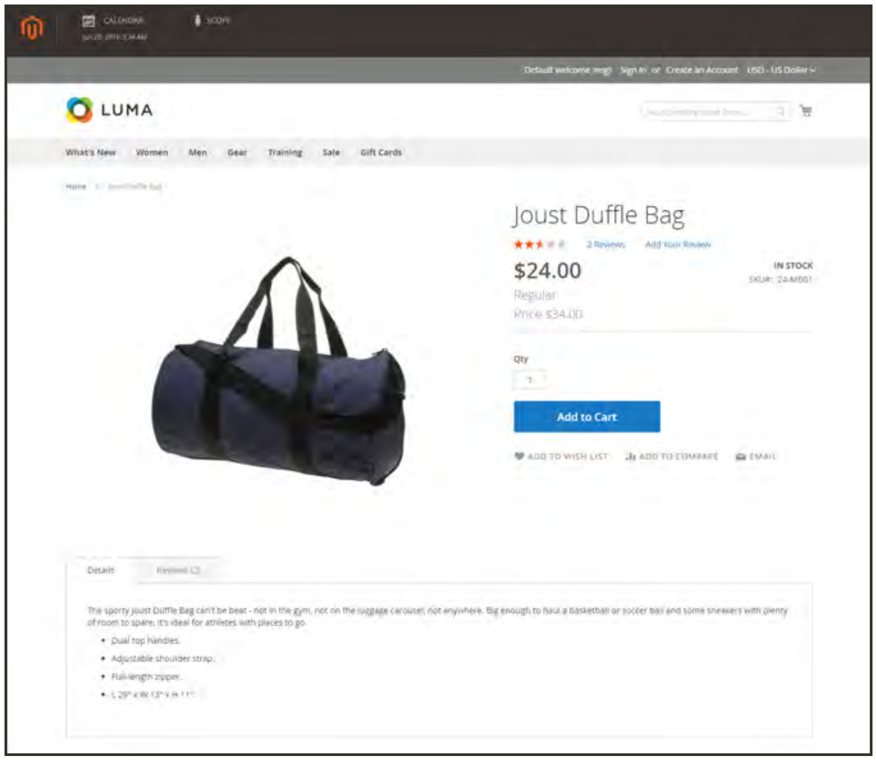
To edit the scheduled change:

1. In the **Scheduled Changes** box at the top of the page, click **View/Edit**.
2. Make any changes necessary to the scheduled update.
3. Tap **Save**.

To preview the campaign:

1. In the **Scheduled Changes** box at the top of the page, click **Preview**.

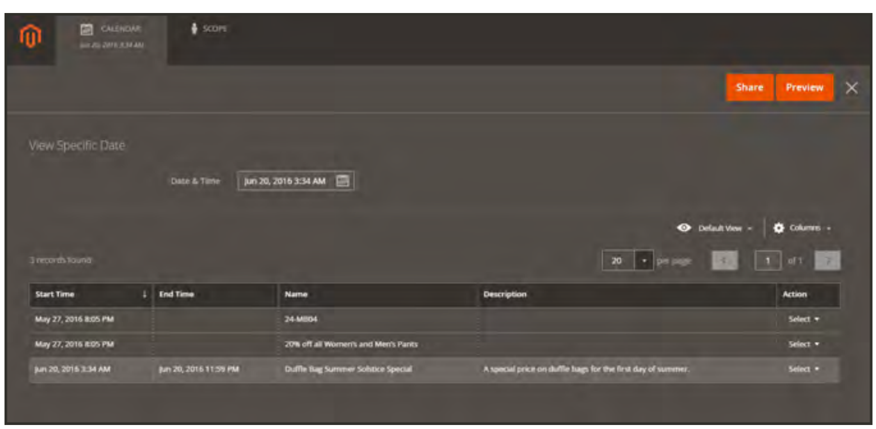
   The Preview opens a new browser tab, and shows how the product will appear during the scheduled campaign.



Preview Scheduled Change

2. In the upper-left corner of the Preview window, tap **Calendar**.

   The calendar detail shows other campaigns that are scheduled for the same day. Each record in the list is a separate campaign.



List of Campaigns Scheduled for a Specific Date

3. To preview a different day or time, tap the **Date & Time** calendar. Then do the following:

   a. Choose a different date and/or time.

   b. Tap **Preview**.

   In this example, the regular price is restored because the special price is no longer in effect.

4. To return to the campaign calendar, tap **Calendar** in the header of the Preview page. From here, you can do the following:

Share a Link to the Preview

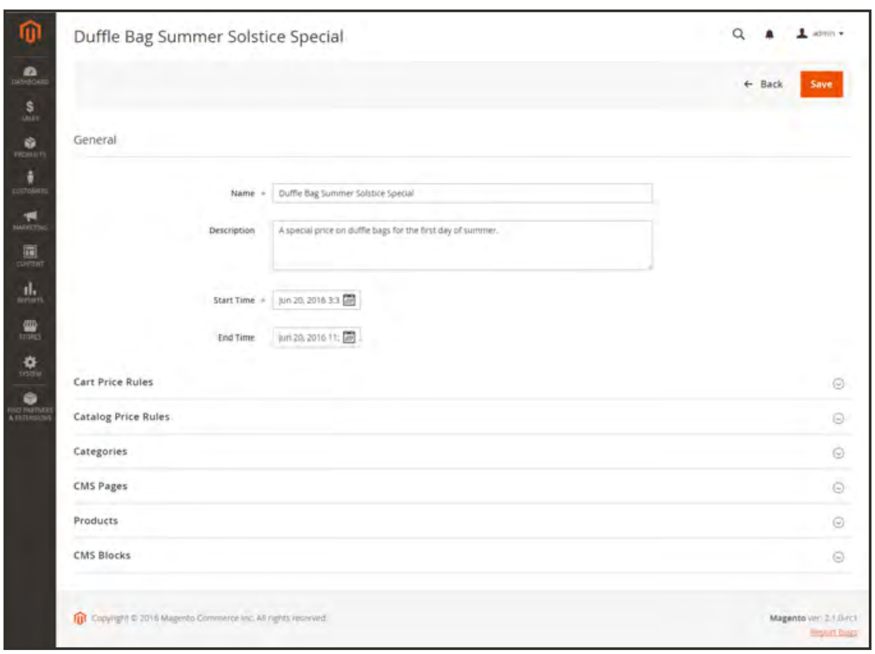
To share a link to the store preview with your colleagues, tap **Share**. Press **Ctrl + C** to copy the link to the clipboard. Then, paste the link into the body of an email message.

Change the Scope of the Preview

To see scheduled changes for different store views, tap **Scope** in the header of the Preview page. Then, choose the Website, Store or Store View that you want to preview.

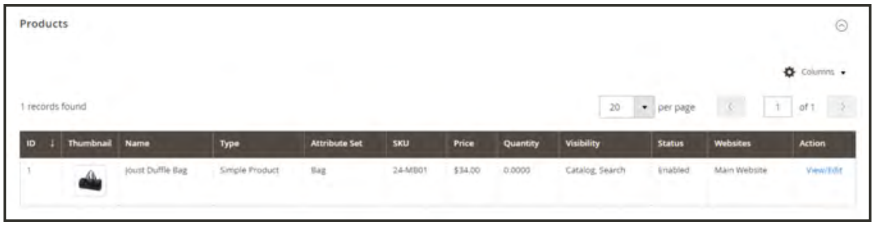
5. If necessary, return to the campaign calendar. To view your scheduled change as part of a campaign, select **View/Edit** in the **Action** column of the list.

   The page includes the general description of the campaign, with a section for each type of entity that might be included.



Edit Campaign

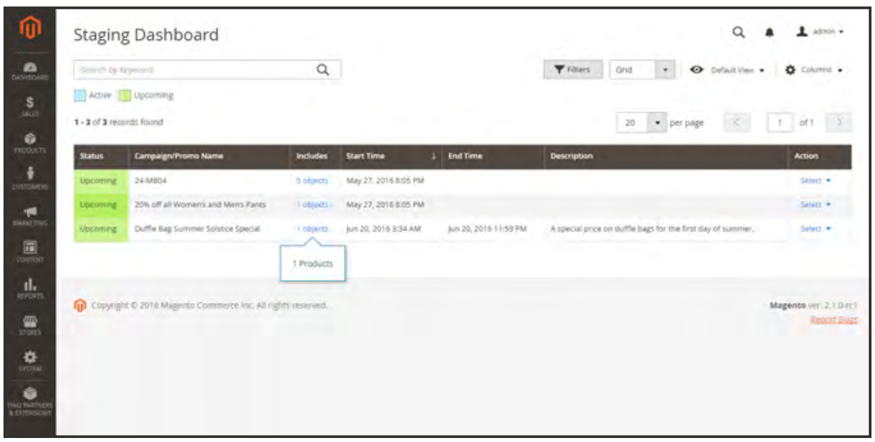
6. Expand the **Products** section to see your scheduled update.



Scheduled Product Update

7. From here, you can do either of the following:
   - In the **Action** column, click **View/Edit** to open the scheduled update.
   - To go to the Staging Dashboard, tap **Back** at the top of the page.

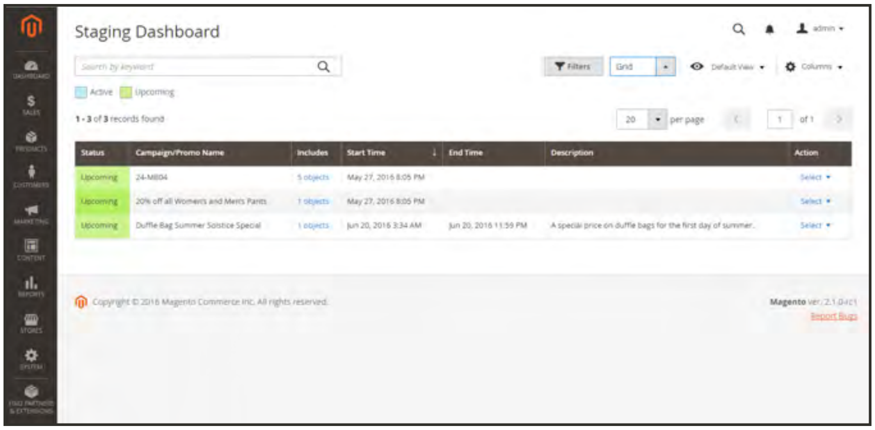
   The Staging Dashboard provides an overview of all active and upcoming campaigns. Although in this example we arrived at the Staging Dashboard after previewing a scheduled change, it can also be directly accessed from the Content menu. The campaign that we created includes one object—or entity—which is the product that was updated. To learn more, see Staging Dashboard.



Staging Dashboard

Staging Dashboard

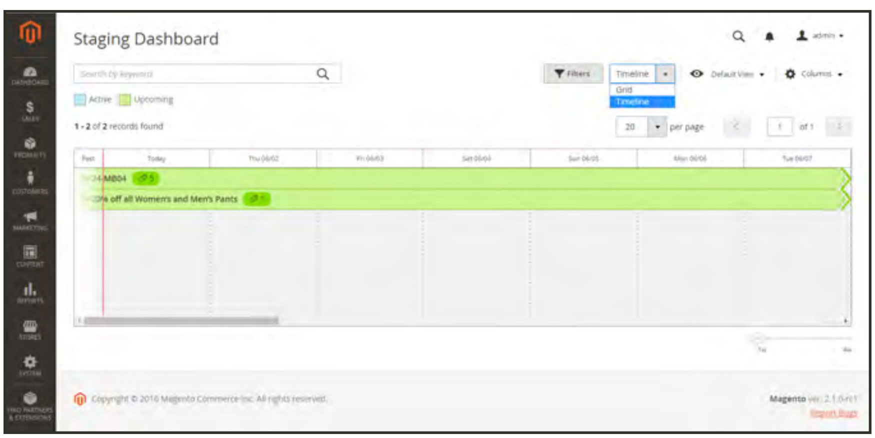
The Staging Dashboard provides an overview of all active and upcoming campaigns. The format of the dashboard can be changed from a grid to a timeline. You can also use filters to find campaigns, customize the column layout, and save different views of the grid. To learn more about the workspace controls, see: Admin Workspace.



Grid View

To open the Staging Dashboard:

1. On the Admin sidebar, tap **Content**.
2. On the menu under **Staging**, choose **Dashboard**.
3. To change the format of the dashboard, set the **View As** control to "Timeline."



Timeline View

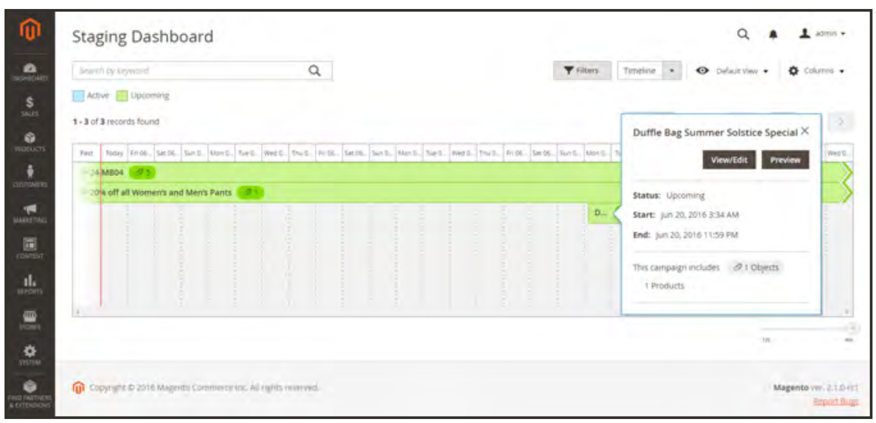
The slider in the lower-right corner can be used to adjust the view from one to four weeks. Each column represents one day.

4. Drag the slider to the “4w” position on the far right. The campaign that is scheduled for June 20 is now visible in the timeline.

4-Week View

5. Click any item in the timeline to display general information about the campaign.

- To open the campaign, tap **View/Edit**.
- To see how the campaign will look to customers in the store on that day, tap **Preview**.



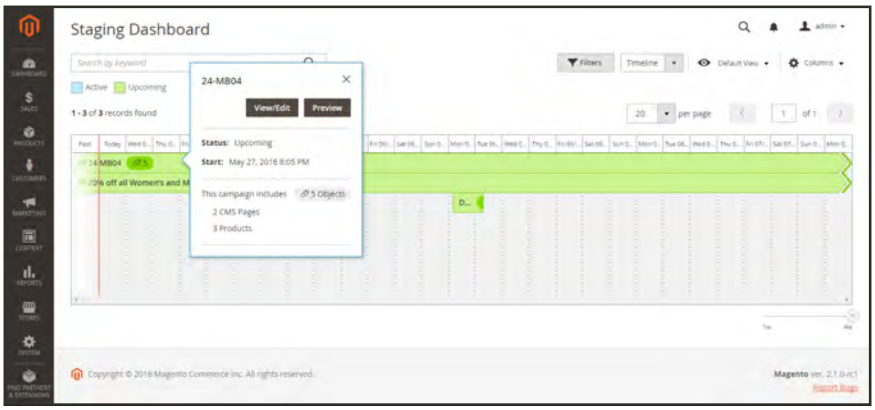
Campaign Information

Editing a Campaign

Existing campaign objects can be edited from the Dashboard, with the exception of price rule campaigns that do not have end dates.

> If a campaign that includes a price rule is initially created without an end date, the campaign cannot later be edited to include an end date. In such a case, it is necessary to create a duplicate campaign and enter the end date that is needed.

Follow the steps below to edit any of the objects in this campaign.

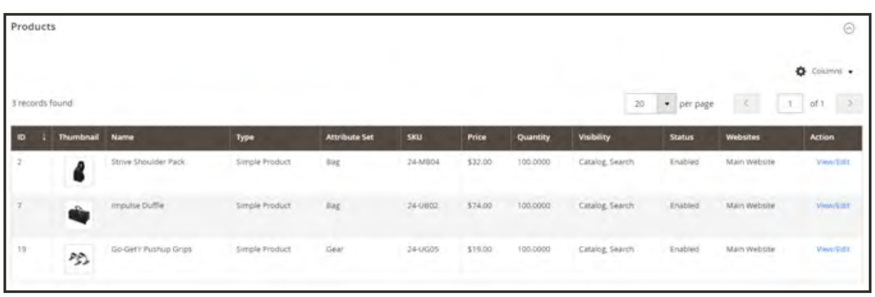


Campaign Detail

To edit a campaign:

1. On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.
2. On the timeline, choose the campaign to be updated. Then, tap **View/Edit**.

   The campaign in this example includes two CMS pages and three products.
3. Update the fields in the **General** information section as needed.
4. Expand the section that contains the item to be edited. Then, do the following:



View/Edit Campaign Item

a. Make any changes necessary to the campaign item.

b. Tap **Save**.

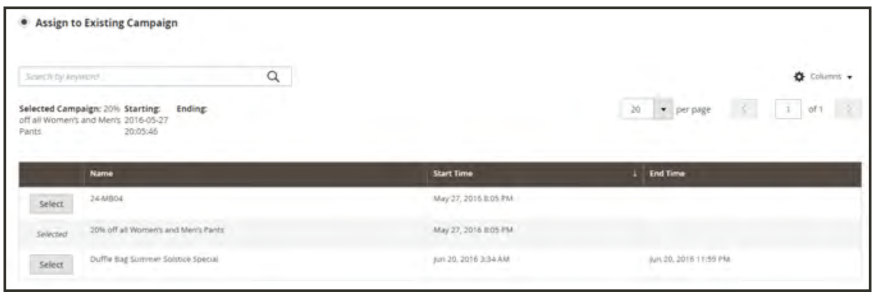
Adding an Item

In this example, we will add an image to the category page for the duration of the campaign.

To add a new item to a campaign:

1. Open the category to be edited.
2. Tap **Schedule New Update**.
3. Select **Assign to Existing Campaign**. Then, do the following:

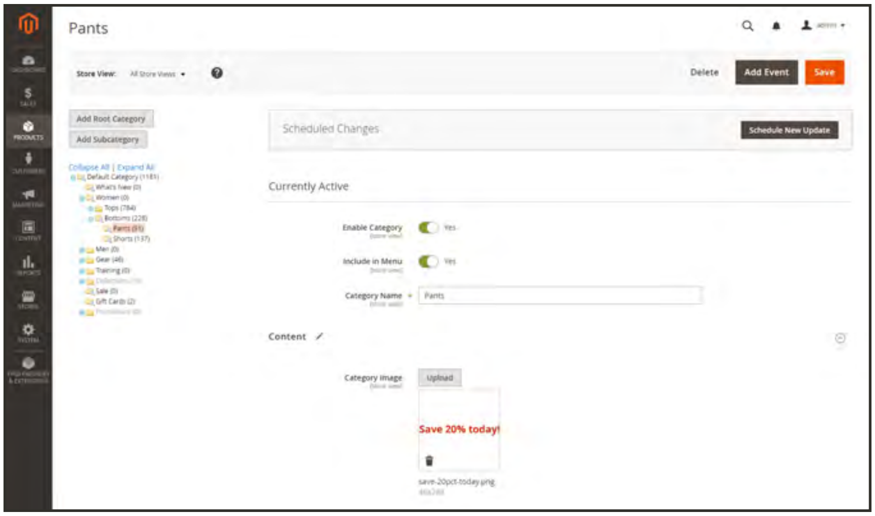
   a. In the list, select the campaign to be modified.



Assign to Existing Campaign

   b. Under **General Information**, expand the **Content** section.

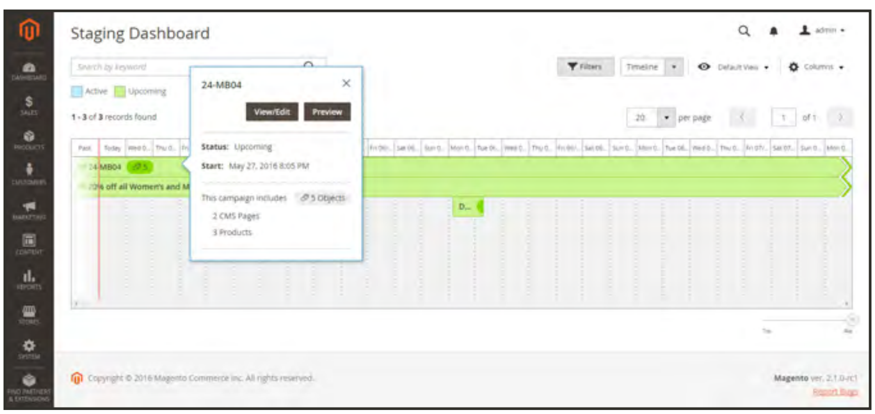
   c. At the **Category Image** field, tap **Upload**. Then, navigate to the image that is to appear on the category page during the campaign.



Add Category Image

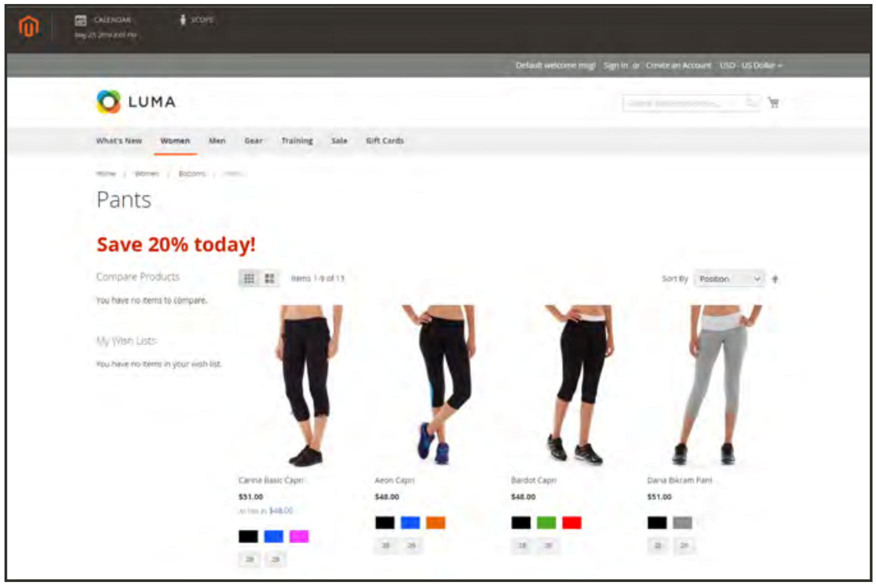
4. When complete, tap **Save**.

5. On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.



Campaign Detail

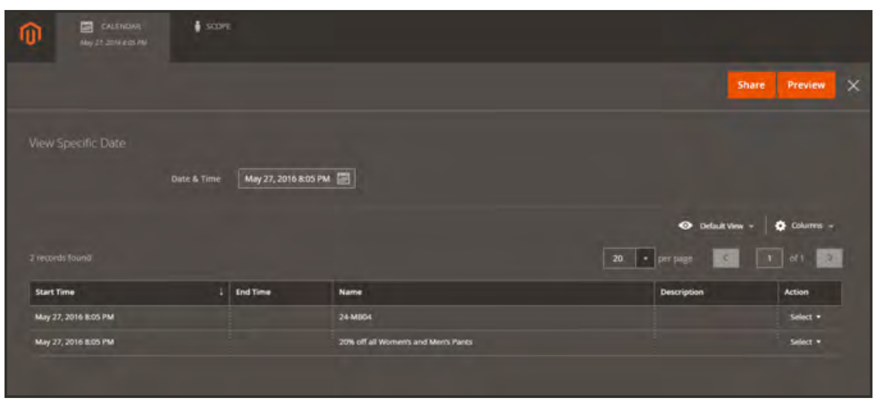
6. Find the campaign in the list. Click once to view the detail, and tap **View/Edit**.



Preview of Category Image During Campaign

Previewing a Campaign

Any day or period of time during a campaign can be previewed and shared with others.



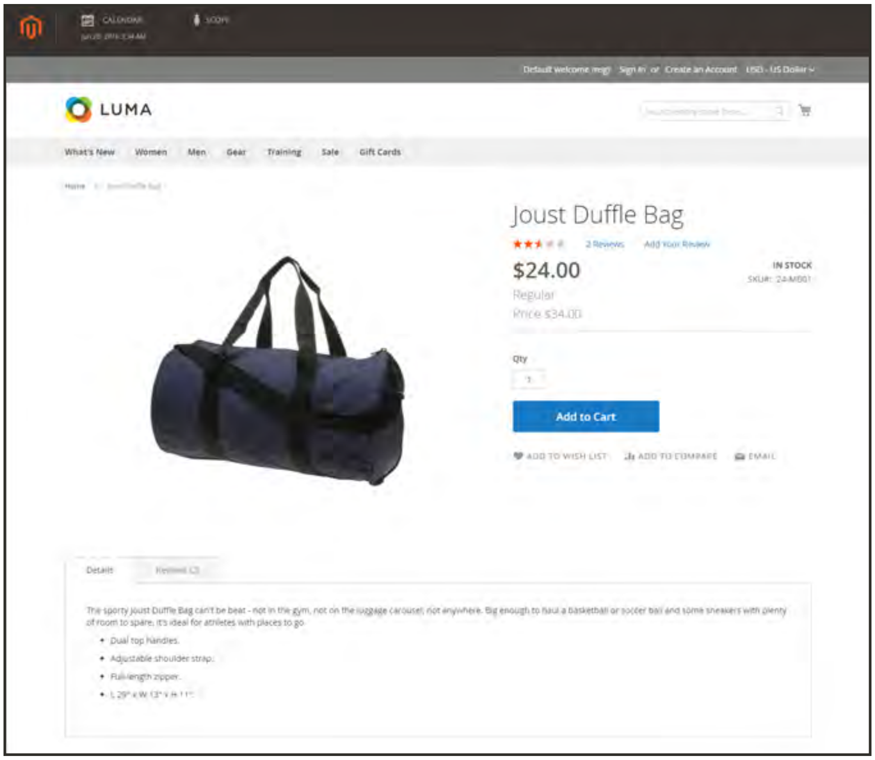
Preview

To preview a campaign:

1. Do one of the following:

   - On the Admin menu, tap **Content**. Then under **Staging**, choose **Dashboard**.
   - On a page with a **Scheduled Changes** box at the top of the page, click **Preview**.

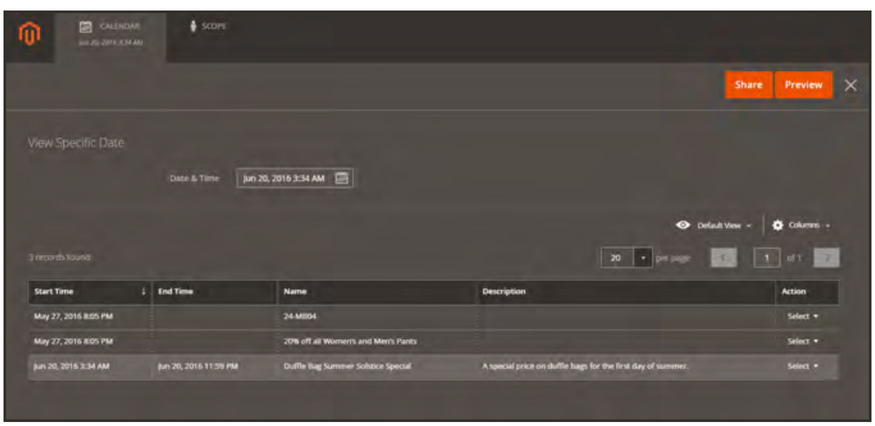
The Preview opens a new browser tab, and shows how the product will appear during the scheduled campaign.



Preview Scheduled Change

2. In the upper-left corner of the Preview window, tap **Calendar**.

   The calendar detail shows other campaigns that are scheduled for the same day. Each record in the list is a separate campaign.



List of Campaigns Scheduled for a Specific Date

3. To preview a different day or time, tap the **Date & Time** calendar ( ). Then do the following:

   a. Choose a different date and/or time.

   b. Tap **Preview**.

   In this example, the regular price is restored because the special price is no longer in effect.

4. To change the scope of the preview for a different store view, do the following:

   a. In the header of the Preview page, tap **Scope**.

   b. Choose the Website, Store or Store View that you want to preview.

5. To share a link to the preview, do the following:

   a. Tap **Share**. Then, press **Ctrl + C** to copy the link to the clipboard.

   b. Paste the link into the body of an email message.

6. To return to the campaign calendar, tap **Calendar** in the header of the Preview page.

CUSTOMERS

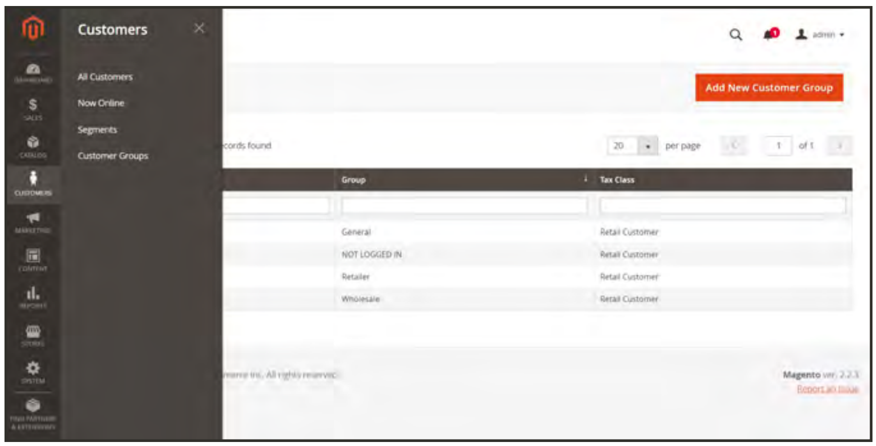
Contents

In this section of the guide, you will become familiar with the customer account dashboard, and learn to configure customer accounts according to your preference. You will also learn how to create customer groups that can be referenced in promotions and tax classes.

CHAPTER 53:

Customers Menu

The Customers menu provides access to customer account management tools, and gives you the ability to see who is currently online in your store.

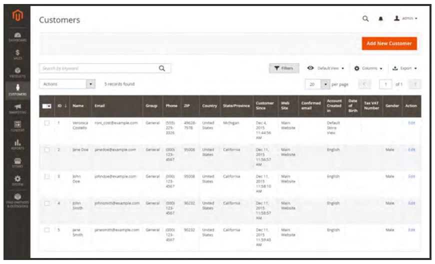


Customers Menu

To display the Customers menu:

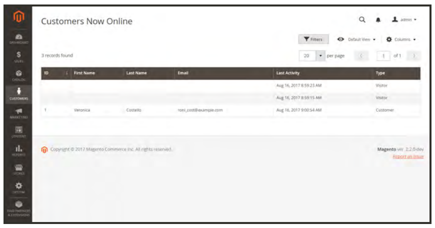
On the Admin sidebar, tap **Customers**.

Menu Options



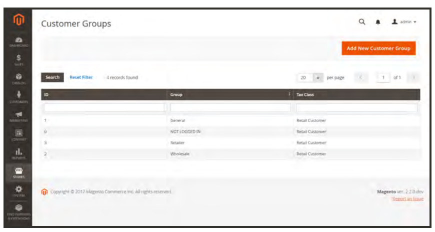
All Customers

Lists all customers who have registered for an account with your store, or were added by the administrator.



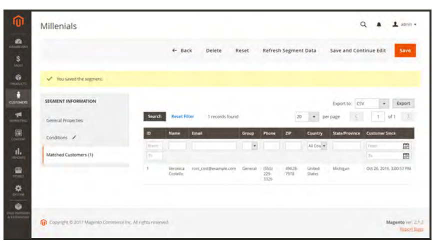
Now Online

Lists all customers and visitors who are currently online in your store.



Customer Groups

The customer group determines which discounts are available to shoppers, and the tax class applies to the purchase.

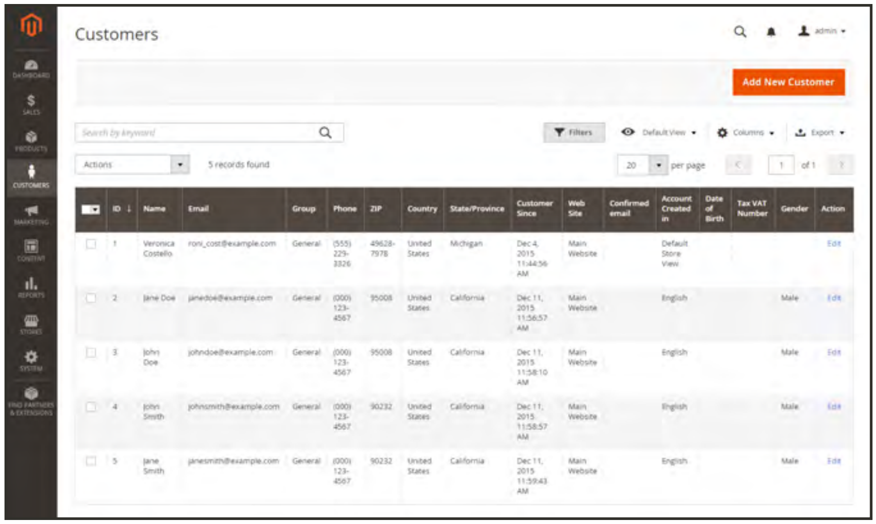


Segments

Dynamically display content and promotions to specific customers, based on properties such as customer address, order history, shopping cart contents, and more.

All Customers

The Customers grid lists all customers who have registered for an account with your store, or were added by the administrator. Use the standard grid controls to filter the list, and adjust the column layout. To learn more, see: Managing Customer Accounts.



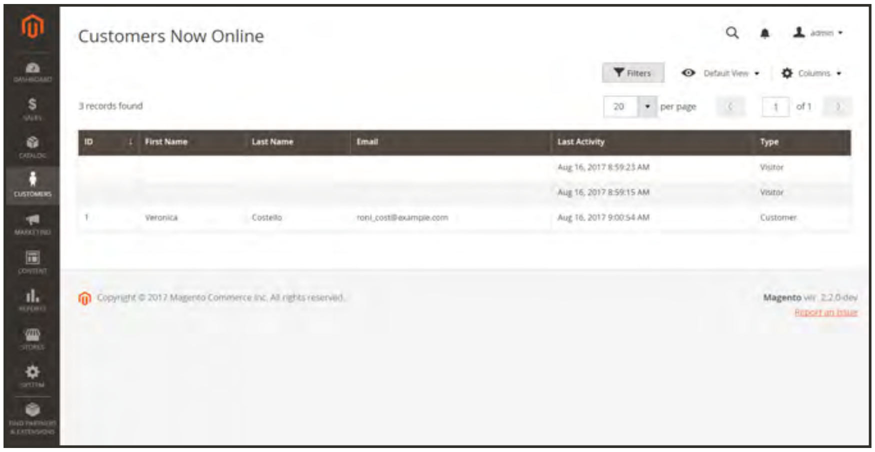
All Customers

To view customer information:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer record. Then in the Action column, click **Edit**.
3. In the panel on the left, choose the information you need to edit. Then, make the necessary changes. To learn more, see: Updating Customer Accounts.
4. When complete, tap **Save Customer**.

Now Online

The Now Online option on the Customers menu lists all customers and visitors who are currently online in your store. The interval of time that customers are shown as currently online is set in the configuration, and determines how long the customer's activity is visible from the Admin. By default, the interval is fifteen minutes.



Online Customers

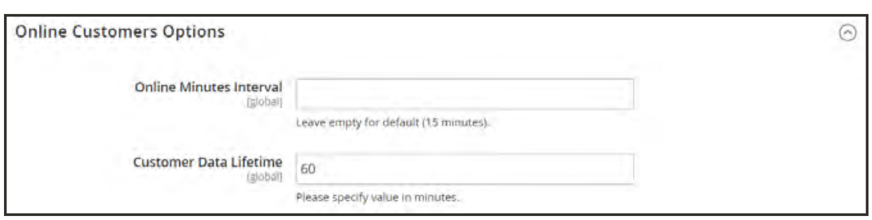
To see all customers who are online now:

1. On the Admin sidebar, tap **Customers**.
2. Choose **Online Now**.

   To help an online customer complete a purchase, see: Shopping Assistance.

To configure the time interval:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand the **Online Customers Options** section. Then, do the following:



Online Customers Options

   a. In the **Online Minutes Interval** field, enter the number of minutes for the customer session to be visible from the Admin. Leave the field empty to accept the default interval of fifteen minutes.

   b. In the **Customer Data Lifetime** field, enter the number of minutes before any unsaved data entered by the customer expires.

4. When complete, tap **Save Config**.

Column Descriptions

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.
IP Address	The IP address of the computer that customers and guests are using to access your store.
Session Start Time	The date and time that marks the beginning of the current customer session.
Last Activity	The date and time of the customer's last activity in your store.
Type	Options include: Customer / Visitor
Last URL	The last URL the customer visited.

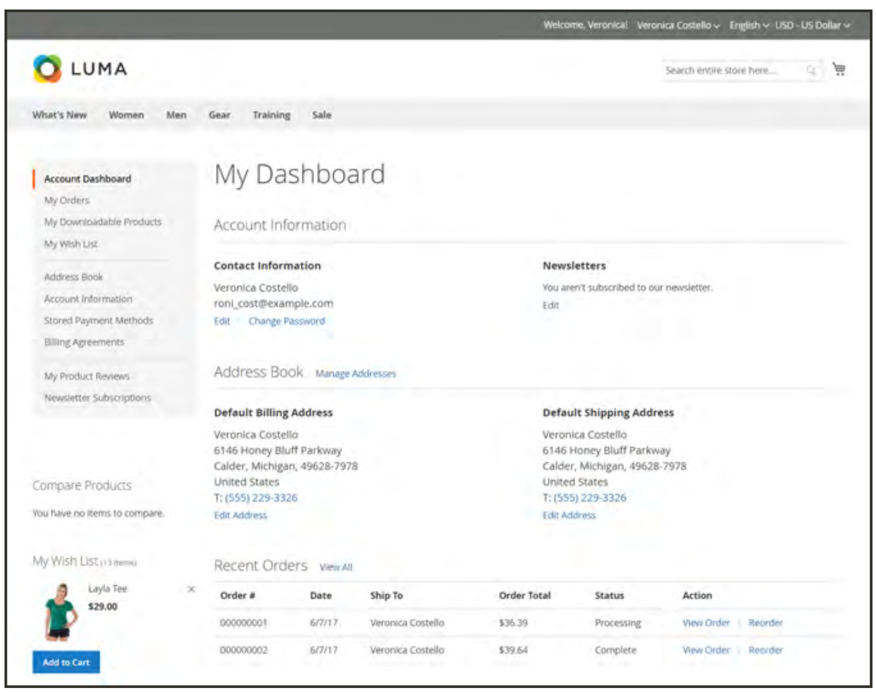
CHAPTER 54:

Customer Accounts

The header of every page in your store extends an invitation for shoppers to “Log in or register” for an account with your store. Customers who open an account enjoy a range of benefits, including:

- **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

Configuring Account Options

The customer account settings determine the information that is collected during customer registration, and the experience that customers have during the process. Customer configuration settings include:

- Account Scope
- Login Landing Page
- New Account Options
- Name and Address Options
- Password Options
- Customer Session Lifetime

Login Landing Page

You can configure your store to redirect customers to their account dashboard after they log in, or let them continue shopping.

To set the login landing page:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left, under **Customers**, choose **Customer Configuration**.

3. Expand the **Login Options** section.

Login Options

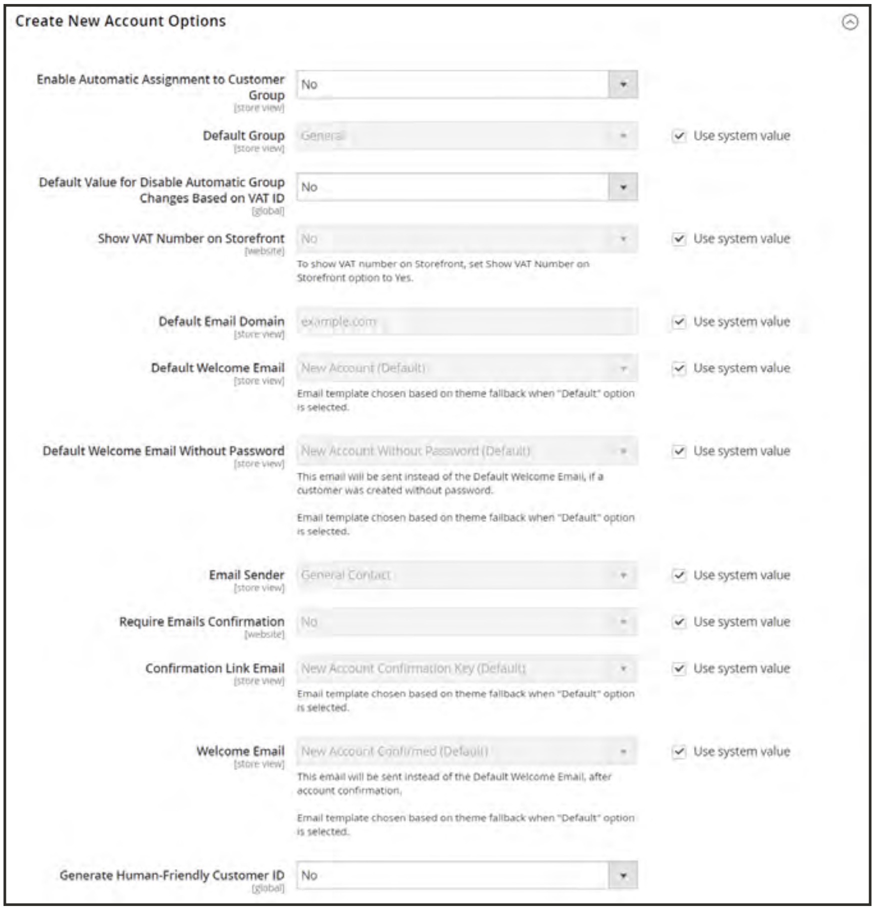
4. Set **Redirect Customer to Account Dashboard after Logging in** to one of the following:

Yes	The account dashboard appears when customers log in to their accounts.
No	Customers can continue shopping after logging in to their accounts.

5. When complete, tap **Save Config**.

New Account Options

In the Create New Account Options section of the configuration, the basic account options are combined with more advanced options that relate to VAT ID Validation and custom integrations. The following instructions cover only the most frequently used options. To learn about automatic customer group assignments, see: VAT ID Validation.



Create New Account Options

To set up the basic customer account options:

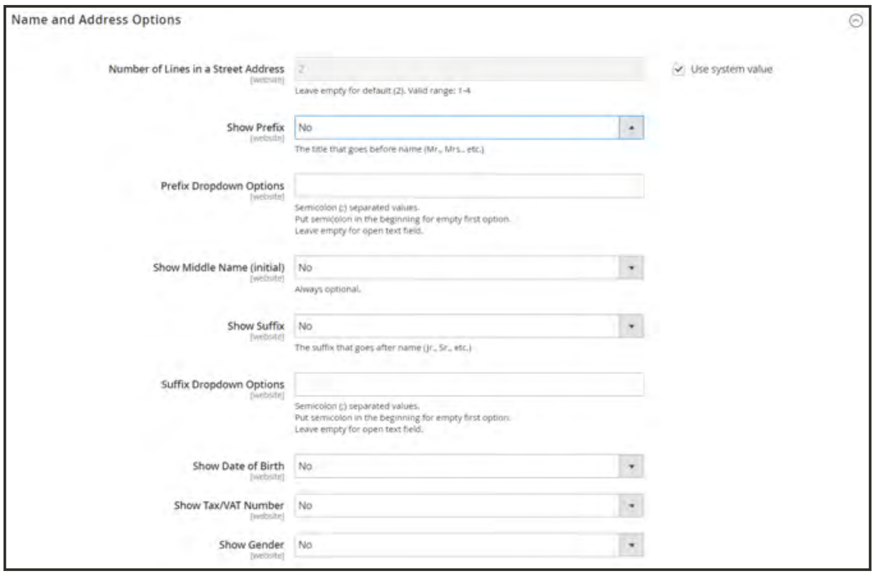
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand the **Create New Account Options** section. Then, do the following:
   a. Set **Default Group** to the customer group 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

1. Enter the **Number of Lines in a Street Address**. If left blank, the street address defaults to 2.
2. To include a prefix before the name, do the following:
   a. Set **Show Prefix** to one of the following:
      - Optional
      - Required

   b. In the **Prefix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
3. To include a suffix after the name, do the following:
   a. Set **Show Suffix** to one of the following:
      - Optional
      - Required

   b. In the **Suffix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
4. To include additional fields, do the following:
   a. Set **Show Date of Birth** to "Yes."

   b. Set **Show Tax/VAT Number** to "Yes."

   c. Set **Show Gender** to "Yes."
5. When complete, tap **Save Config**.

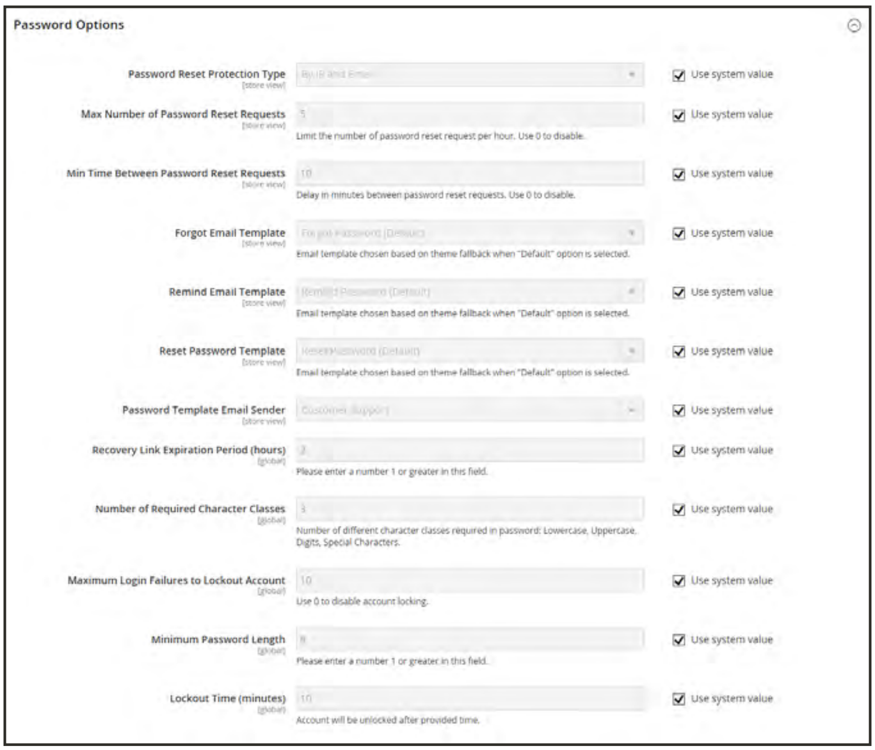
Password Options

The customer password options control the level of security that is used for password reset requests, and determines the email templates that are used for customer notification, and the lifetime of the password recovery link. You can allow customers to change their own passwords, or require that only store administrators can do so

To configure customer password options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Customers**, choose **Customer Configuration**. Then, expand the **Password Options** section.



Password Options

3. Set **Password Reset Protection Type** to the method you want to use for managing password reset requests:

By IP and Email	The password can be reset online after a response is received from a reset notification sent to the email address associated with the Admin account.
By IP	The password can be reset online without additional confirmation.

By Email	The password can be reset only by responding to an email notification that is sent to the email address associated with the Admin account.
None	The password can be reset only by the store administrator.

4. To limit the number of password reset requests sent per hour, do the following:
   a. In the **Max Number of Password Reset Requests** field, enter the maximum number of password reset requests that can be sent per hour.
   b. In the **Min Time Between Password Reset Requests** field, enter the minimum number of minutes that must elapse between requests.
5. To configure the password reset email notification, do the following:
   a. Set **Forgot Email Template** to the template that is used for the email sent to customers who have forgotten their passwords.
   b. Set **Remind Email Template** to the template that is used when a password hint is sent to customers.
   c. Set **Reset Password Template** to the template that is used when customers change their passwords.
   d. Set **Password Template Email Sender** to the store contact that appears as the sender of password-related notifications.
6. Complete the following password reset security options:
   a. In the **Recovery Link Expiration Period (hours)** field, enter the number of hours before the password recovery link expires.
   b. In the **Number of Required Character Classes** field, enter the number of different character types that must be included in a password, based on the following character classes:
      - Lowercase
      - Uppercase
      - Numeric
      - Special Characters
   c. In the **Maximum Login Failures to Lockout Account** field, enter the number of failed login attempts until the Admin account is locked. For unlimited attempts, enter zero (0).
   d. In the **Minimum Password Length** field, enter the minimum number of characters that can be used in a password. The number must be greater than zero.
   e. In the **Lockout Time (minutes)** field, enter the number of minutes an Admin account is locked after too many failed attempts to log in.
7. When complete, tap **Save Config**.

Customer Session Lifetime

The lifetime of a customer shopping session is determined by several factors, including the length of the server session, the use of a persistent cart, and the lifetime of information that is stored in the browser. Although these are related to the same customer experience, they are actually separate processes with different expiration events and lifetimes.

Session	Information that is stored on the server, such as the contents of the shopping cart. If the server session expires before the cookie expires, customers might lose the cart contents and reduce security risk.
Session Cookie	Information that is stored in the browser as a number or string of characters. If the session cookie expires before the server session, the customer is logged out. The session cookie is deleted when the customer closes the browser window. By default, the cookie lifetime is set to 3600 seconds, or one hour. If there is no keyboard activity during that time, the current session ends, and customers must log back into their accounts to continue shopping.

If Persistent Cart is enabled, the cart contents are saved for the next time customers sign into their accounts. When using a persistent cart, it is recommended that you set the lifetime of the server session and the session cookie to a long period of time.

On the server, the length of the session is controlled by `php.ini`, and several variables. At this time, Magento does not have an Admin configuration setting that controls the length of the server session.

To configure the cookie lifetime:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. If you have multiple stores, set the **Store View** chooser in the upper-right corner to the store where the configuration applies.
3. In the panel on the left under **General**, choose **Web**.
4. Expand the **Default Cookie Settings** section.

Default Cookie Settings

5. To change the default, clear the **Use system value** checkbox. Then, enter the new value in seconds.
6. Tap **Save Config**.

Creating a Customer Account

Visitors to your store can open an account to manage their purchases and activities. Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which is useful for helping customers over the phone.

The following instructions represent the default customer account configuration. To change the selection and behavior of some of the fields in the form, see: Configuring Account Options.

Create an Account

Method 1: Create Account from Storefront

1. From the storefront, click the **Create an Account** link in the upper-right corner of the header.
2. Under **Personal Information**, enter your **First Name** and **Last Name**.

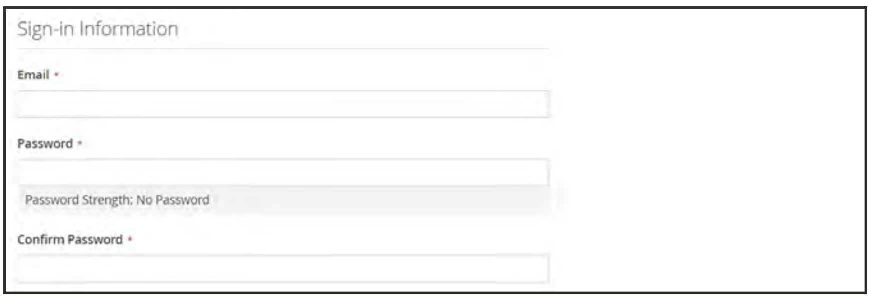
Personal Information

3. If you want to add your name and email address to the list of newsletter subscribers, mark the **Sign Up for Newsletter** checkbox.

   This option appears even if the store doesn't publish a newsletter.

4. Under **Sign-in Information**, enter your **Email** address.

   This email address will become part of your sign-in credentials, and cannot be associated with any other customer account.



Sign-in Information

5. Enter a **Password** that includes three of the following types of information:

   - Lowercase characters
   - Uppercase characters
   - Numbers
   - Special Characters

   After you press **Enter**, the strength of the password is evaluated, and appears below the field. If the password is considered to be "Weak," try another until it evaluated as "Strong".

   Then, enter it again to **Confirm Password**.

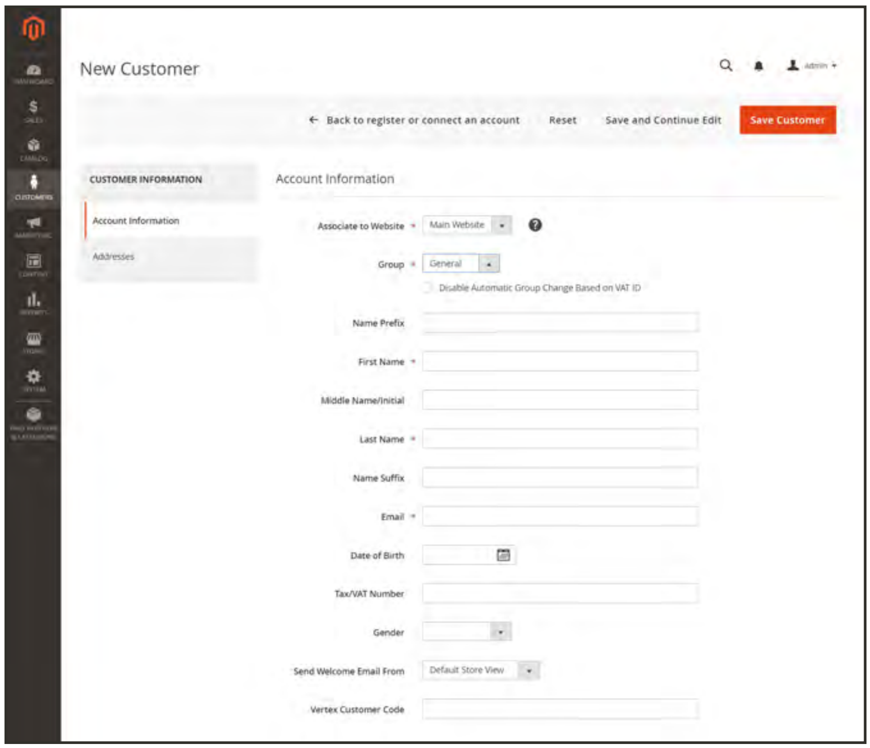
6. When complete, tap **Create an Account**.

You can now use your email address and password to sign in to your account to complete the address information.

Method 2: Create Account from Admin

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Tap **Add New Customer**.

Step 1: Complete the Account Information



Customer Information

1. In the **Account Information** section, do the following:
   a. For a multisite installation, set **Associate to Website** to the website where the customer account applies.
   b. If applicable, assign the customer to a different **Customer Group**.
   c. If using VAT ID Validation, and want to **Disable Automatic Group Change Based on VAT ID**, mark the checkbox.
2. Complete the required fields:
   - First Name
   - Last Name
   - Email

3. Complete the optional fields as needed:
   - Name Prefix
   - Middle Name/Initial
   - Name Suffix
   - Date of Birth
   - Tax/VAT Number
   - Gender

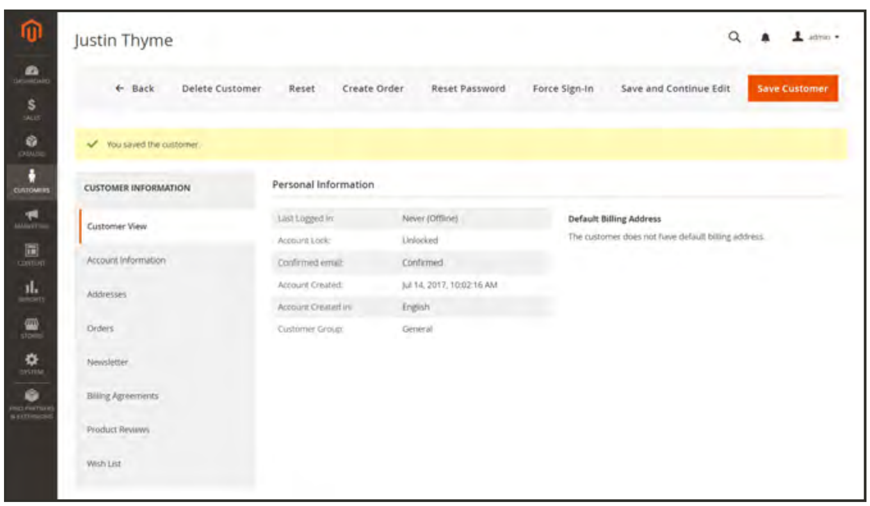
4. Set **Send Welcome Email From** to the store view from which the Welcome email is to be sent.

   If the store has views for different languages, this setting determines the language of the Welcome email.

5. If Vertex Cloud is enabled, enter the **Vertex Customer Code** that you want to use for this customer.

6. Tap **Save and Continue Edit**.

   After the customer account is saved, the full set of options appears in the panel on the left and in the menu at the top of the page. The Customer View tab displays a summary of the account.



Customer View

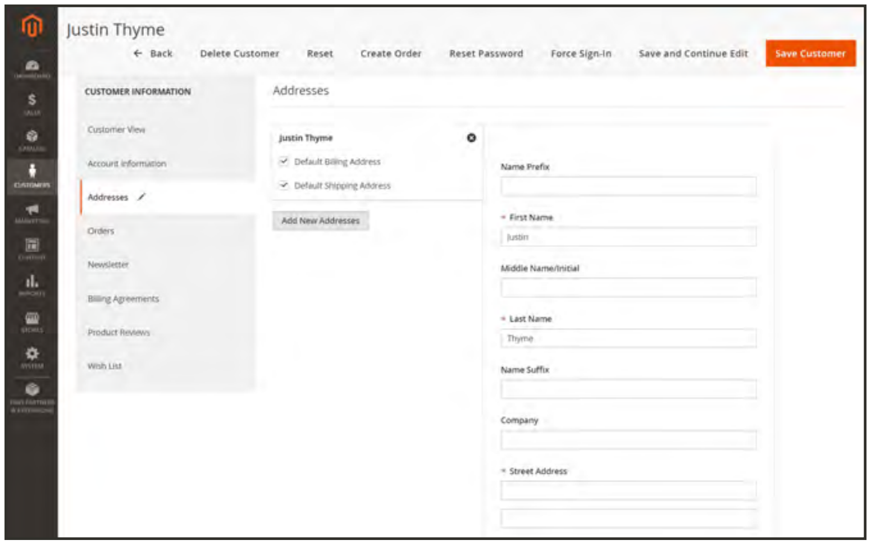
Step 2: Complete the Address Information

1. In the panel on the left, choose **Addresses**. Then, tap **Add New Addresses**.

   The Addresses page has two columns. The first has checkboxes to identify the type of address, and the second contains the fields that are associated with the address.

2. In the first column, mark each checkbox that describes the type of address. Mark both checkboxes if the same address is used for both billing and shipping.

   - Default Billing Address
   - Default Shipping Address



Addresses

3. Scroll down and complete the required address fields in the second column.

   - Street Address
   - City
   - Country
   - State/Province
   - ZIP/Postal Code

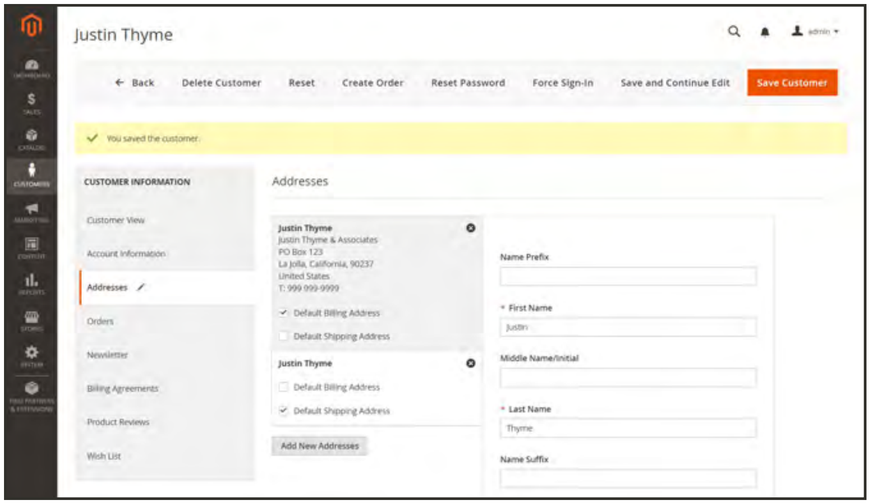
4. Enter the **Phone Number** for this address.

5. If this is the only address that is needed for the account, tap **Save**. Otherwise, tap **Save and Continue Edit**.

6. To add another address, do the following:

   a. Tap **Add New Address**. A new address type box appears below the first.

   b. Mark the checkbox that identifies the type of address that is to be entered.



Specify Address Type

c. In the second column, complete the address fields associated with the address.

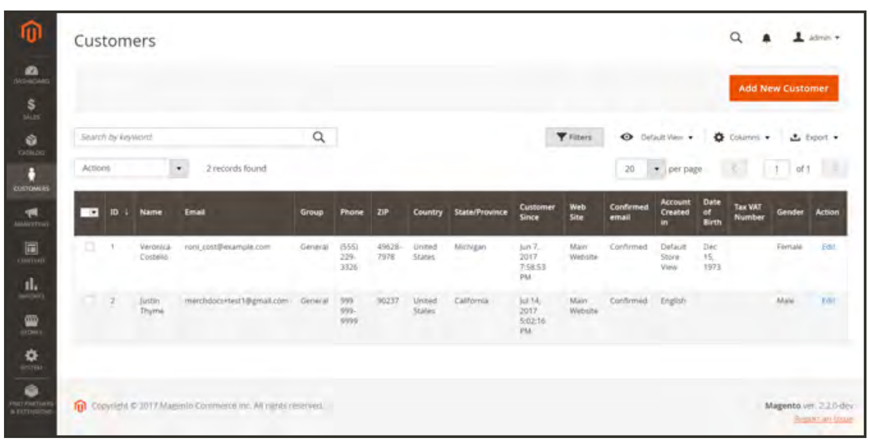
If the name of different person is associated with the address, complete the name information as needed. If the name fields are left blank, the customer name is used for the address.

d. Enter the **Phone Number** for this address.

e. Enter the **VAT Number** that applies to this address, if applicable. To learn more, see: Value Added Tax (VAT).

3. When complete, tap **Save Customer**.

The new customer account now appears in the Customers grid.



New Account in Customers Grid

Step 3: Reset the Password

Customer accounts created from the Admin do not initially have passwords assigned.

1. Find the new customer account in the grid.

2. In the **Action** column, click **Edit**.

3. In the set of options across the top of the page, click **Reset Password**.

   Notification is sent to the account owner, with instructions for setting the password.

Button Bar

BUTTON	DESCRIPTION
Additional buttons become available when the profile is saved for the first time. To learn more, see: Updating a Customer Profile.	
Back	Returns to the Customers page without saving changes.
Reset	Resets any unsaved changes in the customer form to their previous values.
Save and Continue Edit	Saves changes, and keeps the customer profile open.
Save Customer	Saves changes, and closes the customer profile.

Field Descriptions

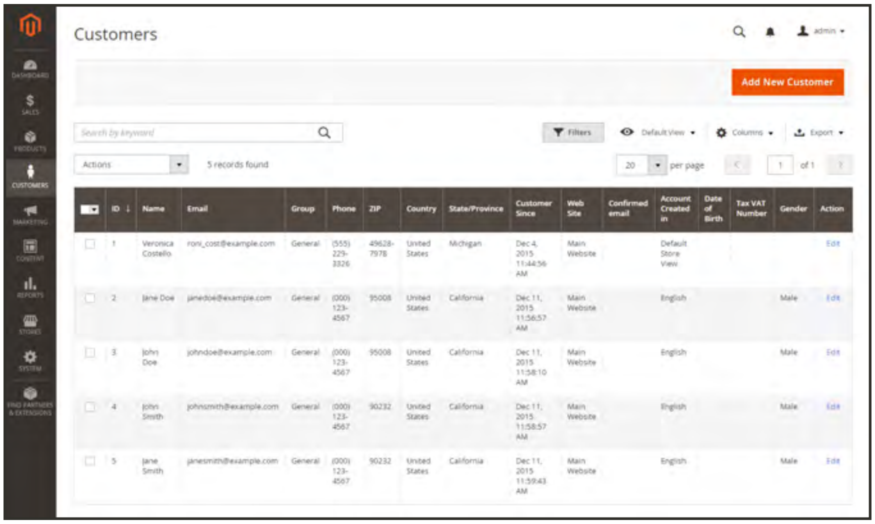
FIELD	DESCRIPTION
ACCOUNT INFORMATION	
Associate to Website	Identifies the website associated with the customer account.
Group	Identifies the customer group to which the customer belongs. If applicable, mark the checkbox to disable automatic group change based on VAT.
Name Prefix	If used, the prefix that is associated with the customer’s name. For example: Mr., Ms, or Dr. The prefix values are determined by the configuration. Depending on the configuration, the input control might be a text field or a drop-down list of options.
First Name	The customer’s first name.
Middle Name / Initial	The middle name or initial of the customer. This field is included only if specified in the configuration.
Last Name	The customer’s last name.
Name Suffix	If used, the suffix that is associated with the customer's name. For example: Jr.,Sr., or III. The suffix values are determined by the configuration. Depending on the configuration, the input control might be a text field or a drop-down list of options.
Email	The customer’s email address.
Date of Birth	The customer’s date of birth. The date of birth is included if specified in the configuration.
Tax / VAT Number	The customer's Tax or Value Added Tax number, if applicable.
Gender	Identifies the customer's gender. The gender is included if specified in the configuration. Options: Male Female Not Specified
Send Welcome Email From	If you have multiple store views, identifies the store view from which the Welcome message is sent. If store views are used for different languages, this determines the language of the Welcome email.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Vertex Customer Code	(Requires Vertex Cloud) A unique code that is referenced for customer exceptions. The code can be an abbreviation of the customer name, number, or alphanumeric string.
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. A second line of the street address is available if specified in the configuration.
City	The city where the customer address is located.
Country	The country where the customer address is located.
State/Province	The state or province where the customer address is located.
Zip/Postal Code	The ZIP or postal code where the customer address is located.
Phone Number	The customer’s phone number that is associated with address.
VAT Number	If applicable, the value added tax number that applies to the customer at this address.

Managing Customer Accounts

The Customers grid lists all current customer accounts, Use the standard workplace controls to filter the list, change the column layout, save views, and export data. The Actions control above the grid can be used to apply an operation to multiple customer records.



All Customers

To apply an action:

The following actions can be applied to either single or multiple records.

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.

2. In the first column of the grid, mark the checkbox of each record that you want to update. Then, follow the instructions for the action that you want to apply:

Delete Customer Accounts

Deleted customer accounts cannot be restored. Information about customer activity and transactions is retained in the system.

1. Set the **Actions** control to "Delete".
2. When prompted to confirm, tap **OK**.

Subscribe to Newsletter

1. Set the **Actions** control to "Subscribe to newsletter".
2. When prompted to confirm, tap **OK**.

Unsubscribe from Newsletter

1. Set the **Actions** control to "Unsubscribe to newsletter".
2. When prompted to confirm, tap **OK**.

Assign a Customer Group

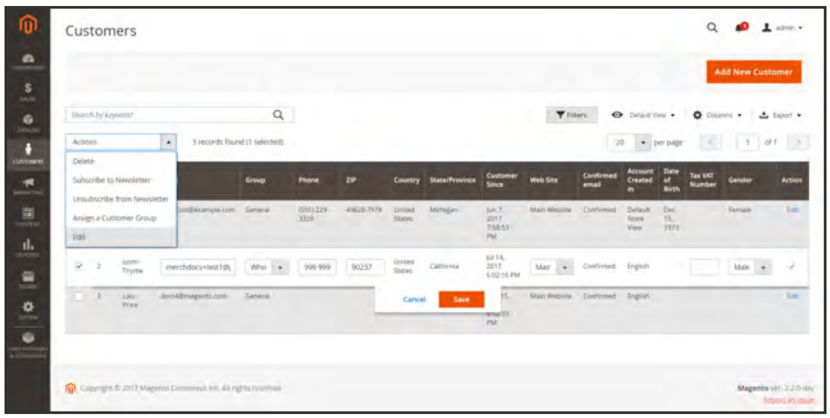
1. Set the **Actions** control to “Assign a customer group”.
2. Choose the customer group to which all selected customer records are to be assigned.
3. When prompted to confirm, tap **OK**.

Edit a Customer Account

Method 1: Quick Edit

1. In the first column, mark the checkbox of the customer account to be edited.
2. Set the **Actions** column to “Edit.”

   The value of each value that can be updated appears in a text box. Only some values of the selected customer record can be edited from the grid.



Quick Edit

3. Update any of the following values, as needed:
   - Email
   - Group
   - Phone
   - ZIP
   - Web Site
   - Tax/VAT Number
   - Gender
4. Tap **Save**.

Method 2: Full Edit

1. In the grid, find the customer record to be edited.
2. In the **Actions** column on far right, click **Edit**.
3. Make the necessary changes to the company information.

   To learn more, see: Updating a Customer Profile.

3. When complete, tap **Save**.

Actions Control

OPTION	DESCRIPTION
Delete	Deletes selected customer accounts.
Subscribe to Newsletter	Subscribes selected customers to newsletter.
Unsubscribe from Newsletter	Unsubscribes selected customers from newsletter.
Assign a Customer Group	Assigns selected customers to a customer group.
Edit	Allows some values of a single selected customer record to be edited from the grid. By default, the following values are available for a quick edit: Email, Group, Phone, ZIP, Web Site, Tax VAT Number, and Gender.

Column Descriptions

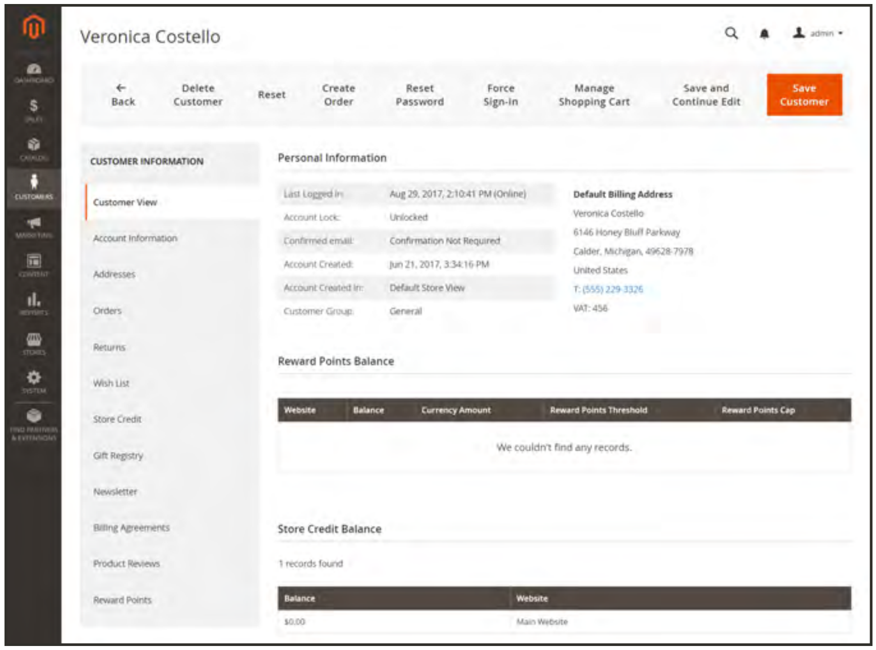
FIELD	DESCRIPTION
Select	Mark the checkbox to select customer records that are to be subjects of an action. Or, use the selection control in the column header to select/deselect all.
ID	A unique numeric identifier that is assigned when the customer account is created.
Name	The first and last name of the customer.
Email	The email address of the customer.
Group	The customer group to which the customer is assigned.
Phone	The phone number of the customer.
ZIP	The ZIP or postal code of the customer.
Country	The country where the customer is located.
State/Province	The state or province where the customer is located.
Customer Since	The date and time the customer account was created.
Web Site	The web site in the store hierarchy to which the customer account is associated.
Confirmed Email	Indicates if a confirmation email is required to be sent.
Account Created In	Indicates the store view from which the customer account was created.
Date of Birth	The date of birth of the customer.
Tax / VAT Number	If applicable, the tax number or value-added tax number that is assigned to the customer. This field is not the same as the VAT Number
Gender	The gender of the customer.
Action	Edit: Opens the company account in edit mode.
ADDITIONAL COLUMNS	
The following columns are available by changing the column layout of the grid.	

Column Descriptions (cont.)

FIELD	DESCRIPTION
Company	The company name of the customer.
Street Address	The street address of the customer.
City	The city where the customer is located.
Fax	The fax number of the customer, if applicable.
Billing Firstname	The first name in the billing address of the customer.
Billing Lastname	The last name in the billing address of the customer.
Billing Address	The address where billing information is to be sent.
Shipping Address	The address where orders are to be shipped.
VAT Number	The value-added tax number that is associated with the customer address. For digital goods sold in the EU, the VAT is based on the billing address of the customer. This field is not the same as the Tax/VAT Number.
Account Lock	Indicates the status of the account. As a security measure, customer accounts can be locked after too many login attempts. Values: Locked / Unlocked

Updating a Customer Profile

The panel on the left of the Customer Information page includes information about customer activity, such as when the customer last signed in or out of their account, addresses, order statistics, recent orders, shopping cart contents, product reviews, newsletter subscriptions, and so on.



Customer Profile

To update a customer profile:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the panel on the left, choose the type of information you need to edit. Then, make any necessary changes to the field values, using the field descriptions for reference.
4. When complete, tap **Save Customer**.

Button Bar

BUTTON	DESCRIPTION
Back	Returns to the Customers page without saving changes.
Delete Customer	Deletes the customer account.
Reset	Resets any unsaved changes in the customer form to their previous values.
Create Order	Creates a new order that is associated with the customer account.
Reset Password	Resets the password of the customer.
Force Sign-In	Clears the tokens associated with the customer's password, and provides the administrator access to the account,
Manage Shopping Cart	Provides access to the shopping cart of a customer.
Save and Continue Edit	Saves changes, and keeps the customer account open.
Save Customer	Saves changes, and closes the customer account.

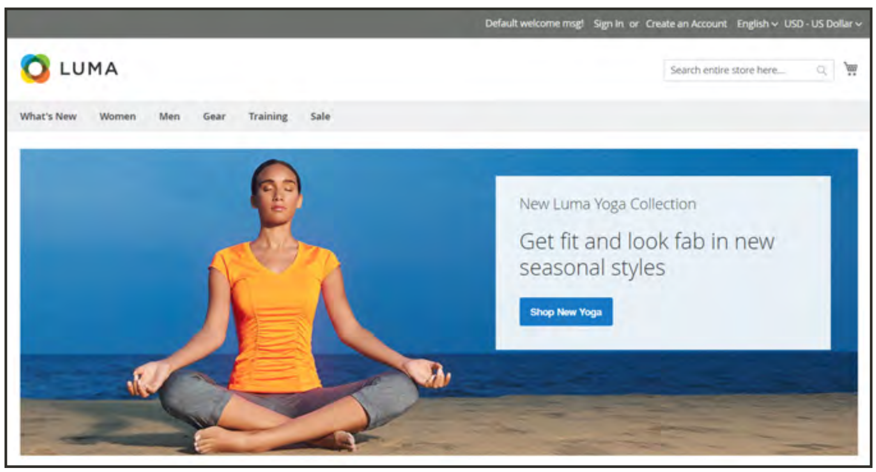
Customer Sign In

Customer have easy access to their accounts from every page in your store. Depending on the configuration, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts.

If Amazon Pay is enabled for your store, customers who sign in with the credentials from their Amazon account can use the shipping addresses and payment methods that are available in their Amazon account during checkout. Login with Amazon requires customers to grant permission to share data from their Amazon accounts with your store.

If a CAPTCHA enabled in the configuration, the person must correctly complete a test that verifies them to be human, before gaining access to their accounts.

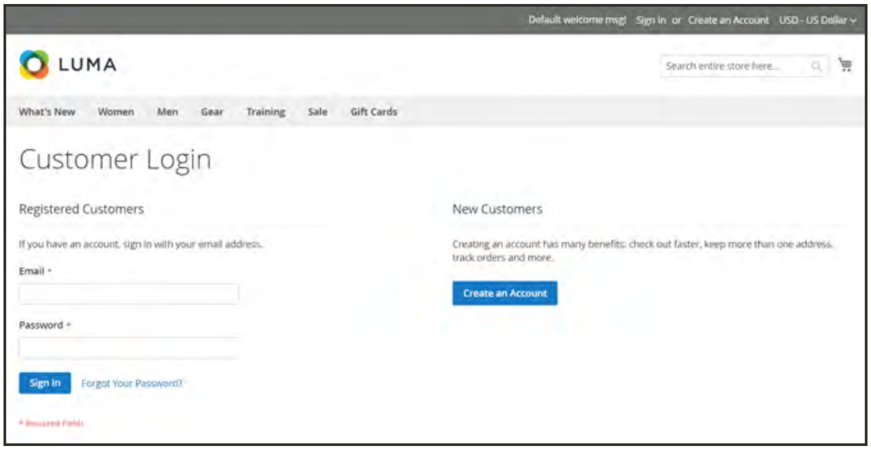
When customers forget their passwords, a reset link is sent to the email address that is associated with the account. The number of times a customer can try to enter a password, the number of minutes between attempts, the number of total attempts before the account is locked, and the length of the lockout is set in the Password Options configuration.



Sign In

To sign in to your customer account:

1. In the header of the store, click **Sign in**.



Customer Login

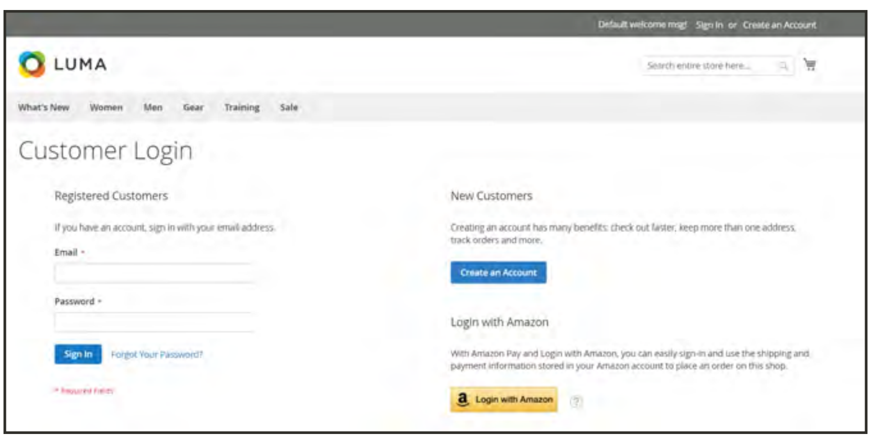
2. Enter your **Email** address and **Password**. Then, tap **Sign in**.

   If you can't remember your password, click **Forgot Your Password?** Then, follow the instructions to reset your password.

To sign in with Amazon:

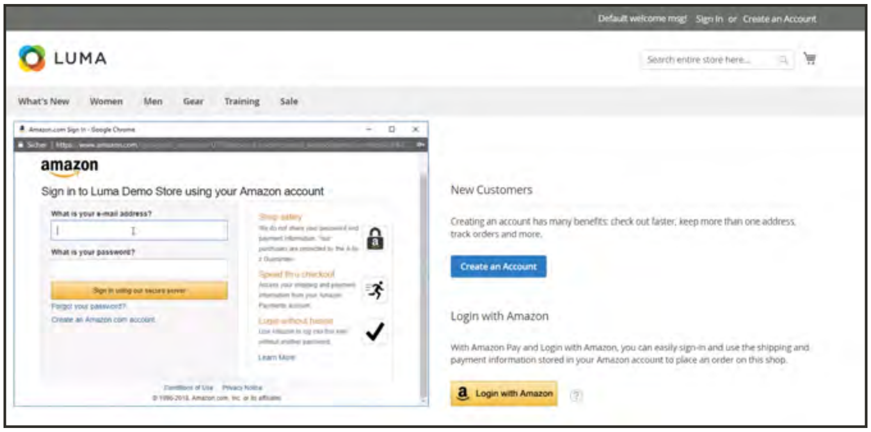
1. In the header of the store, click **Sign in**.

2. Tap **Login with Amazon**.



Login with Amazon

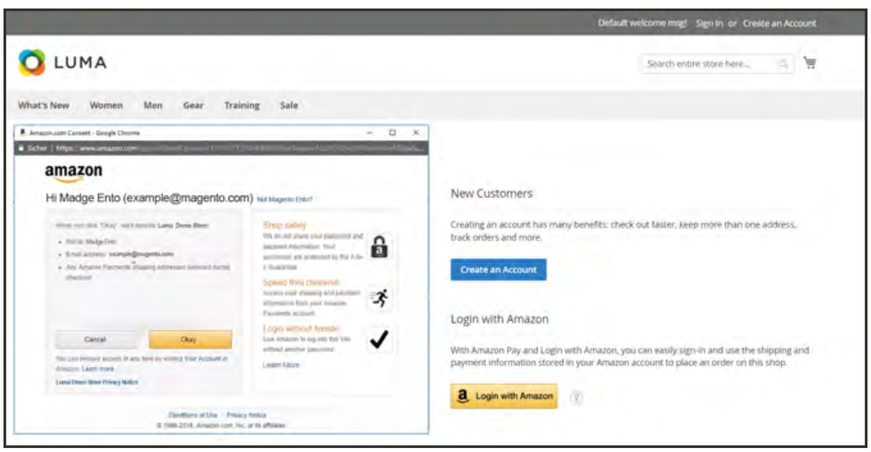
3. When prompted to sign in, enter the **email address** and **password** for your Amazon buyer account.



Enter Your Amazon Credentials

4. To grant Amazon permission to share the following information from your account with the store when processing your purchases, tap **Okay**.

- Your Name
- Your Email Address
- Shipping Addresses



Grant Permission to Share Data

Resetting Passwords

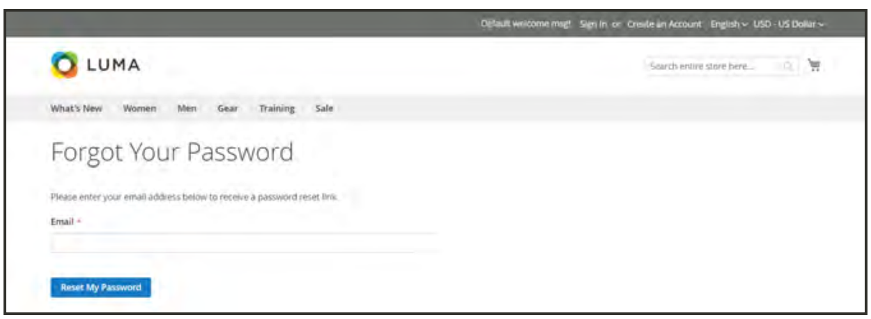
Customers usually reset their passwords from the storefront by clicking the “Forgot Your Password?” link.

However, the store administrator can initiate either a password reset or a forced sign in from the Admin.

Reset Password	A password reset email is sent directly to the customer’s email account. At no time does the store administrator gain access to the customer’s password.
Force Sign In	Revokes the OAuth access tokens that are associated with the customer account. This can be used only with customer accounts that have been assigned OAuth tokens.as part of a Web API integration. To learn more, see: OAuth-based authenication. Standard customer accounts created from the storefront or from the Admin do not have OAuth tokens.

To reset a password from the storefront:

1. On the Login page, tap **Forgot Your Password?**.
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Reset My Password**.



Forgot Your Password

If the email address you entered matches the one that is associated with the account, you will receive a "Password Reset Confirmation" email with a link to reset your password.

3. When the email arrives, click the reset password link, and when prompted, enter your **New Password**. Enter it again to confirm, and tap **Reset Password**.

> Your new password must be six or more characters in length, without spaces.

When you receive confirmation that the password is updated, you can use the new password to sign in to your account.

To reset a password from the Admin:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer account in the grid. Then in the **Action** column, click **Edit**.
3. In the set of options across the top of the page, tap **Reset Password**.

   The number of password reset requests that are allowed within an hour is set in the configuration.

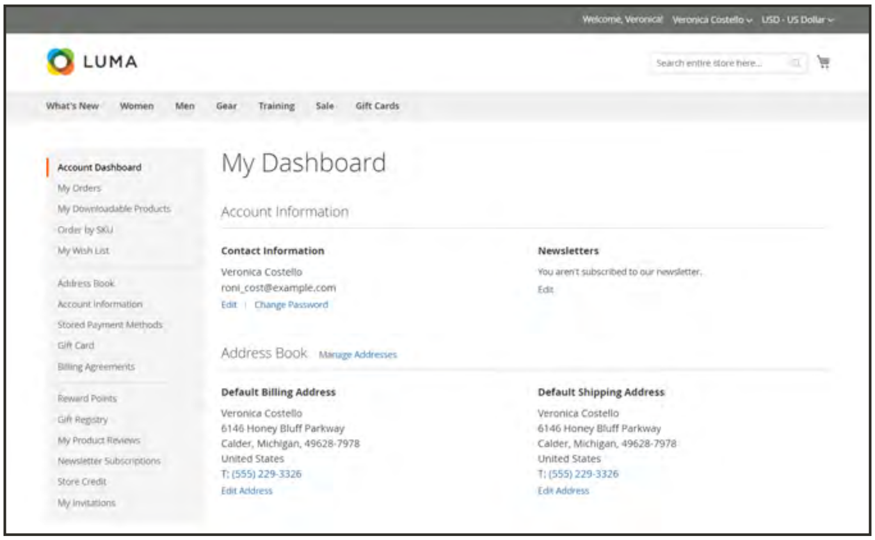
To revoke a customer's OAuth tokens:

> Do not proceed unless you are a developer familiar with API Authentication.

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer account in the grid. Then in the **Action** column, click **Edit**.
3. In the set of options across the top of the page, tap **Force Sign In**.
4. When prompted to confirm, tap **OK**.

Account Dashboard

The customer's account dashboard gives them the ability to reorder, track orders, manage shipping addresses and store activities. The full range of B2B options are available only for customers who are associated with a company. Otherwise, the dashboard options for individual accounts are the same as those available to Magento Commerce customers.



Account Dashboard

Account Dashboard

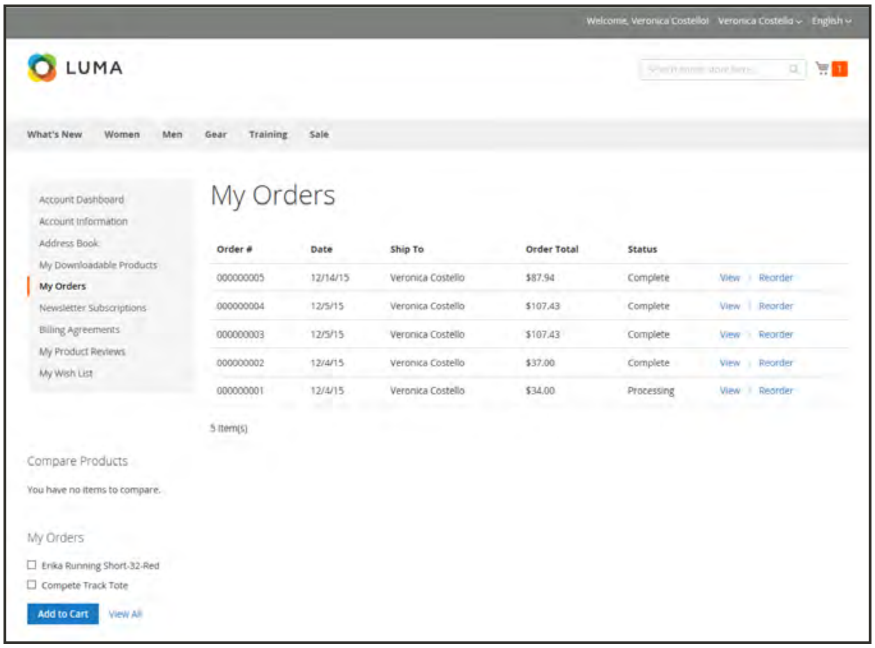
SECTION	DESCRIPTION
My Orders	Displays a list of all customer orders, with a link to each. If enabled in the configuration, any order can be reordered by simply clicking the Reorder link.
Order by SKU	Gives you the ability to add individual items to the cart by SKU, or import a list of products to be ordered from a CSV file.
My Downloadable Products	Lists all downloadable products the customer has purchased, with a link to each.
My Wish List	Manage your wish lists, and place orders from wish list items.
Address Book	The customer address book includes the default billing and shipping address, and additional address entries.
Account Information	Customers can update their account information and change their password as needed. The store Admin can also update customer accounts and access the information to offer shopping assistance.

Account Dashboard (cont.)

SECTION	DESCRIPTION
Store Credit	Displays the current amount of store credit from returns, refunds, and redeemed gift card that can be applied to purchases.
Stored Payment Methods	Lists any payment methods with secure vaults that are used by the customer to store credit card information.
Gift Card	Allows customers to check the current balance on available gift cards, and to redeem gift cards for store credit.
Billing Agreements	Displays a list of any customer billing agreements.
Reward Points	Lists all reward points the customer has earned that can be applied toward purchases.
Gift Registry	Used to list and maintains gift registries, and add new ones.
My Product Reviews	Displays a list of all product reviews submitted by the customer, with a link to each.
Newsletter Subscriptions	Lists all available newsletters. Those to which the customer is currently subscribed have a checkmark.
My Invitations	Lists all invitations the customer has created and sent for scheduled events.

My Orders

You have access to all of your orders from your account dashboard. Orders can be viewed, tracked, and resubmitted as new orders. Depending on the status of the order, you can print orders, invoices, and shipment records.



My Orders

To view an order:

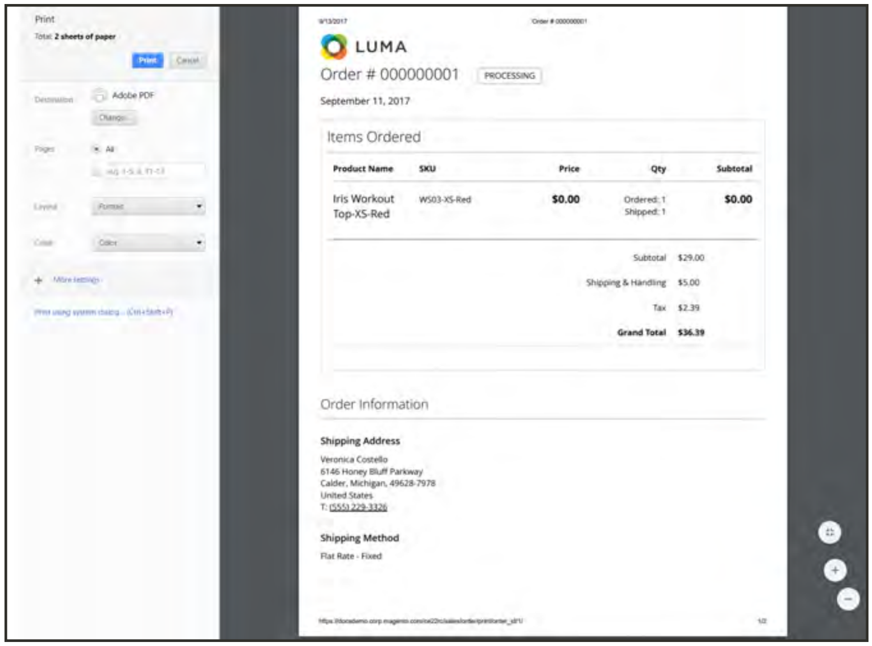
Find the order in the list, and click **View Order**. Then from the open order, do any of the following:

Reorder

1. To create a new order that is a duplicate of the current order, click the **Reorder** link.
2. When the shopping cart appears with the items from the order, you can either continue shopping, or proceed to checkout.

Print Order

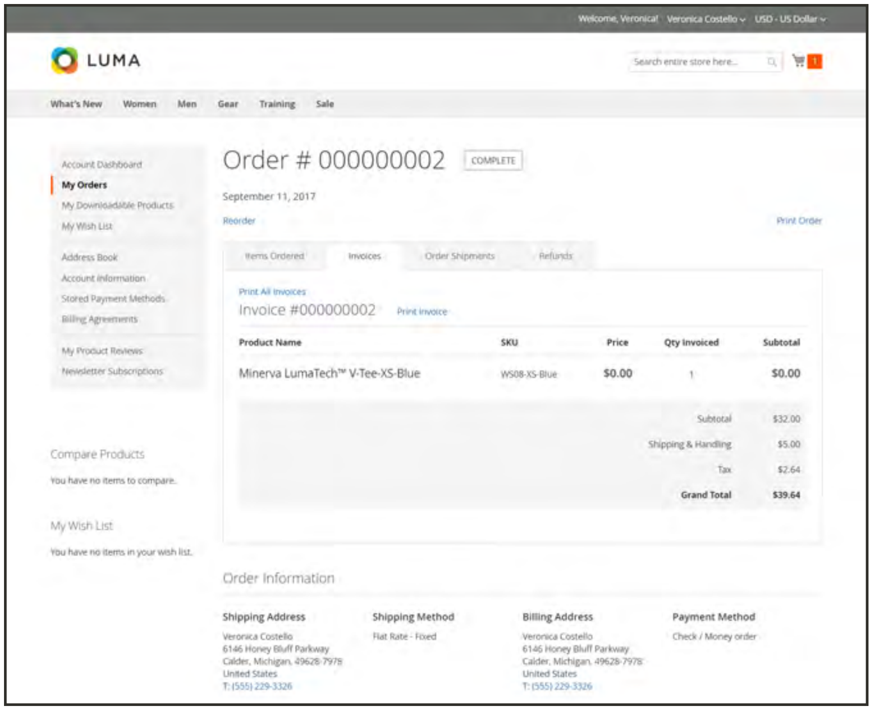
1. Click **Print Order**.
2. Verify the output device, or choose another.
3. Tap **Print**.



Print Order

Print Invoices

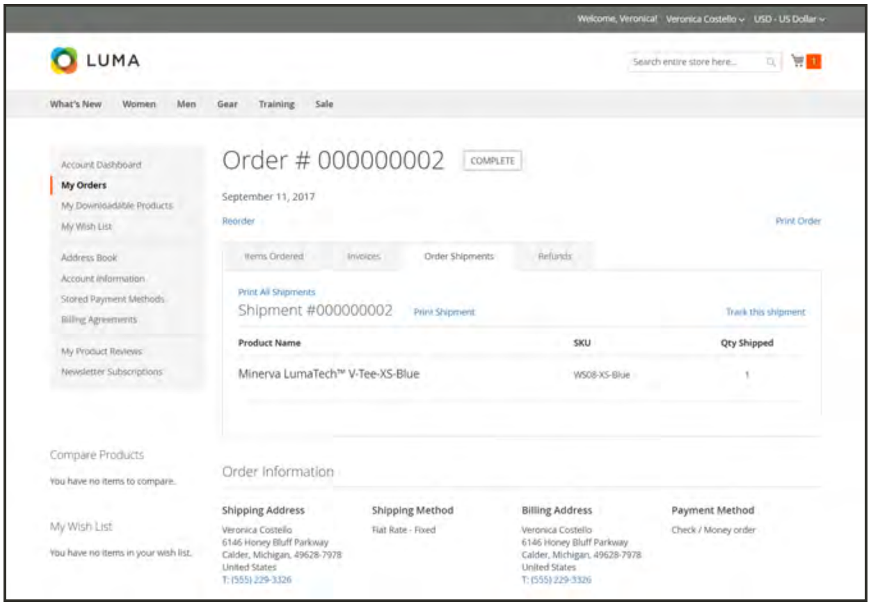
1. On the **Invoices** tab, click one of the following:
   - Print All Invoices
   - Print Invoice
2. Verify the output device, or choose another.
3. Tap **Print**.



Invoices

Print Shipments

1. On the **Order Shipments** tab, click one of the following:
   - Print All Shipments
   - Print Shipment
2. Verify the output device, or choose another.
3. Tap **Print**.



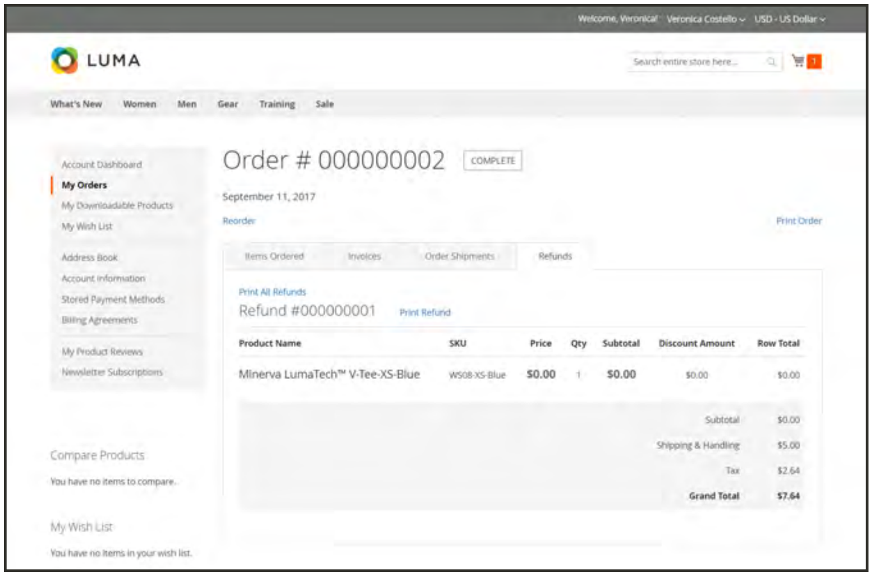
Order Shipments

Track a Shipment

1. On the **Order Shipments** tab, click **Track this Shipment**.
2. Any tracking information that is available appears in a popup window.
3. When ready, tap **Close Window**.

Print Refunds

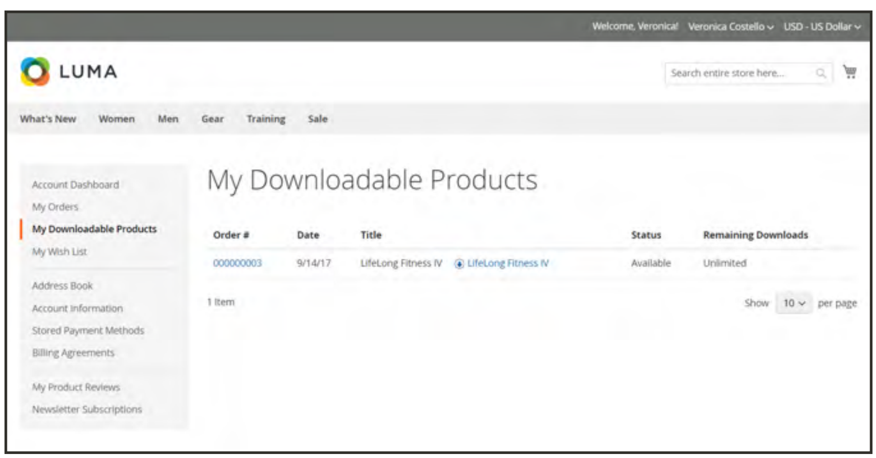
1. On the **Refunds** tab, click one of the following:
   - Print All Refunds
   - Print Refund
2. Verify the output device, or choose another.
3. Tap **Print**.



Refunds

My Downloadable Products

The My Downloadable Products page links to each order of downloadable products. The downloads become available from the dashboard as soon as the order is complete.



My Downloadable Products

To download a product:

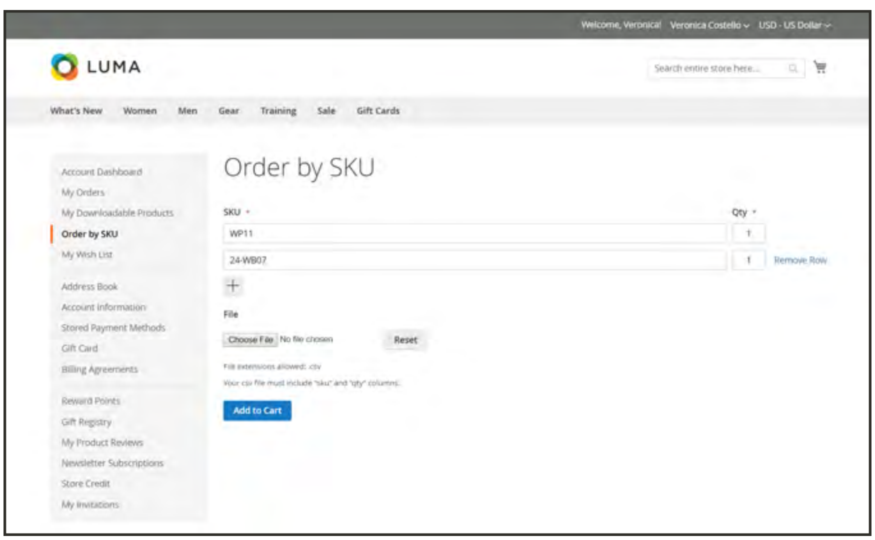
1. In your account dashboard, choose **My Downloadable Products**.
2. Find the order in the list, and click the download link after the title.
3. In the lower-right corner of the download window, click the download icon.

4. Look for the name of the download file to appear in the lower-left corner of the window. Then, save the file.

Download Video

Order by SKU

Order by SKU gives you the ability to add individual products to your cart by SKU and quantity, or import a list of products from a file.



Order by SKU

To add products by SKU:

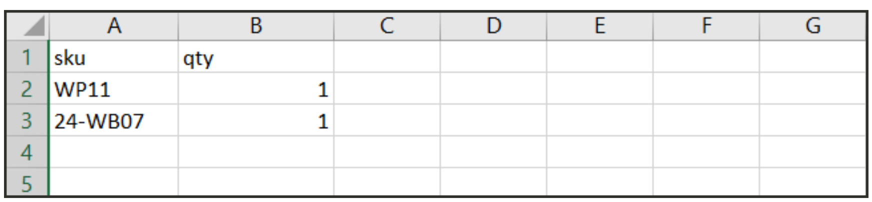
1. Use either, or both of the following methods to add products by SKU:

Method 1: Add Individual SKUs

1. Enter the **SKU** and **Qty** of the product.
2. Tap **Add** ( ) for each additional product that you want to order. Then, enter the **SKU** and **Qty** for each line item.
3. When ready, tap **Add to Cart**.

Method 2: Import a List of SKUs

1. To prepare the list, do the following:
   a. In a spreadsheet, create a file with the column headers "sku" and "qty" in lowercase characters.
   b. Enter the **sku** and **qty** of each product that you want to import.
   c. Save it as a CSV (Comma Separated Value) file.



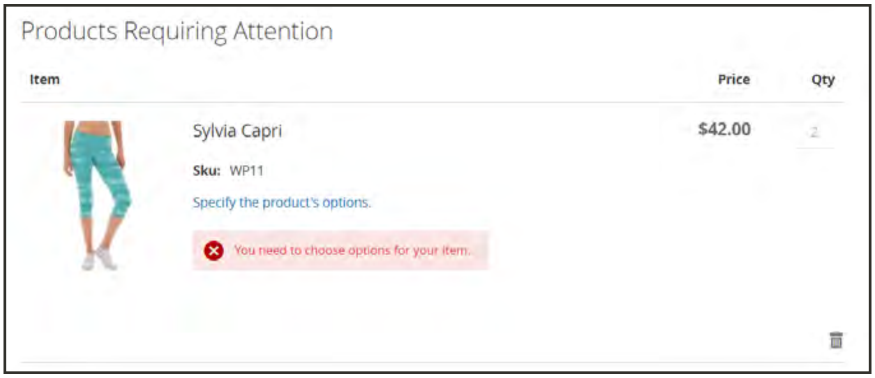
	A	B	C	D	E	F	G
1	sku	qty					
2	WP11	1					
3	24-WB07	1					
4							
5							

SKUs to Import

> Microsoft Excel supports several CSV formats, including CSV (Comma delimited), CSV (Macintosh), and CSV (MS-DOS).

2. On the Order by SKU page, tap **Choose File**. Then, find the CSV file that you prepared and saved.
3. When complete, tap **Add to Cart**.

2. If any of the products have additional options, you will be prompted from the shopping cart that the product requires your attention.



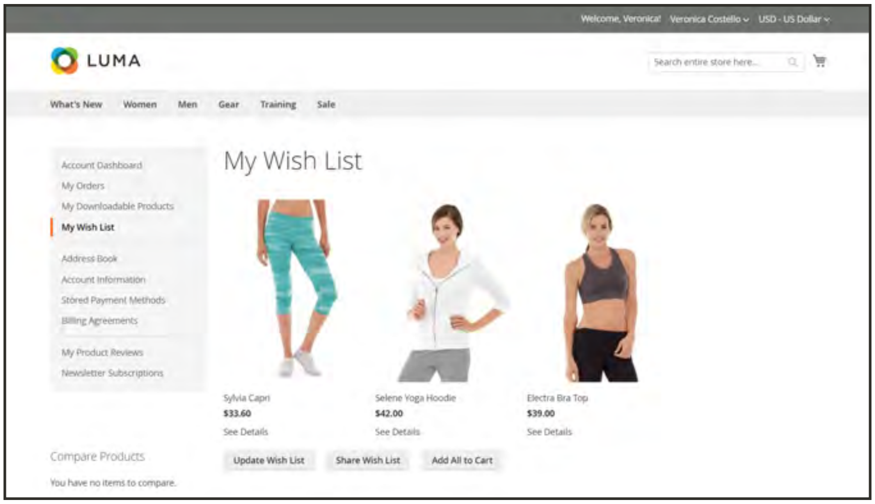
Product Requires Attention

> If you entered duplicate SKUs, the quantities will be combined into a single line item in the shopping cart. Before placing the order, check the quantity ordered to make sure that's it's correct. If you change the quantity of any item, tap Update Shopping Cart to recalculate the totals.

3. When ready, tap **Proceed to Checkout**.

My Wish List

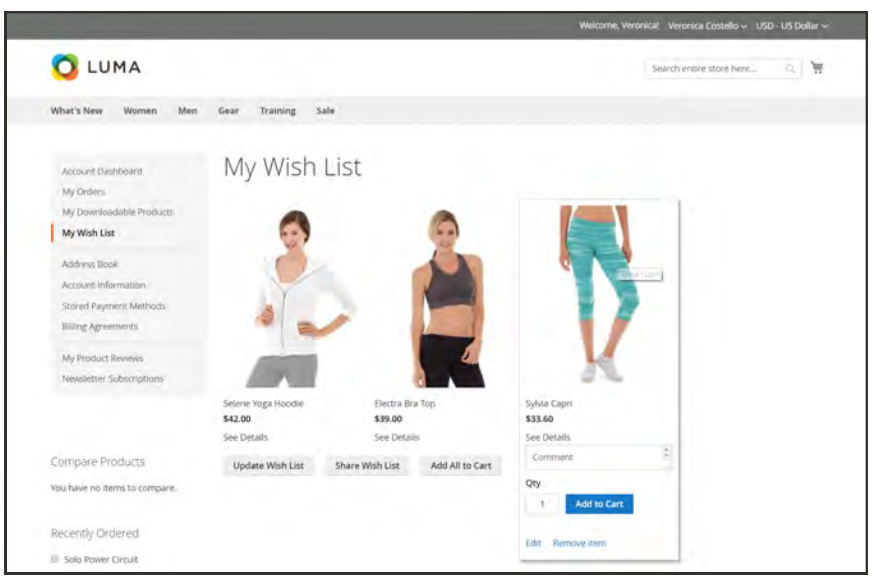
Your wish list is a convenient way to keep track of products that you like, but are not ready to buy. Items from your wish list can be shared with others, or added to the shopping cart.



My Wish List

To update the product listing:

1. From your wish list, point to the product to display the options.
2. To add a **Comment** about the product, enter the text in the box below the price.



Edit Options

3. To change the selection of product options, click **Edit**. Then, do the following:

   a. Update the options on the product detail page.

   b. Click **Update Wish List**.

To add a product to the cart:

1. In your wish list, point to the product that you want to add.

2. Update the **Qty** and edit the other options as necessary.

3. Tap **Add to Cart**.

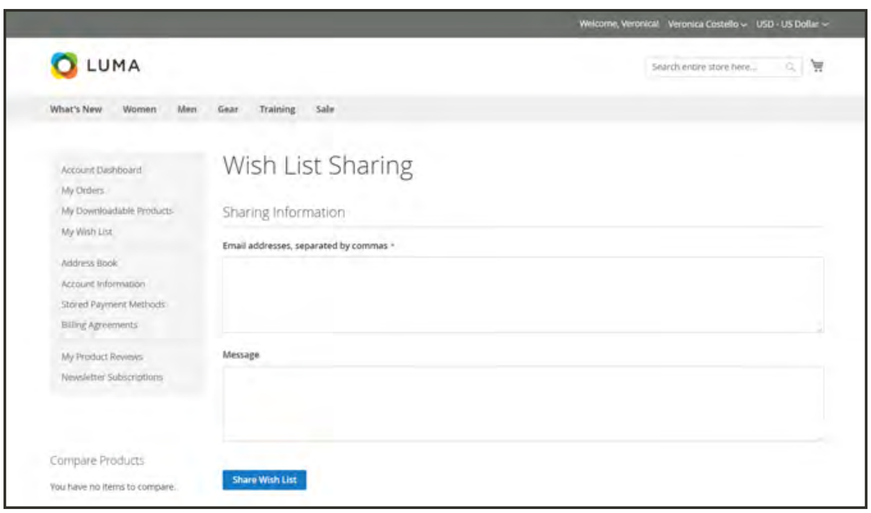
To share your wish list:

1. Tap **Share Wishlist**.

2. Enter the email address of each person who is to receive your wish list, separated by a comma.

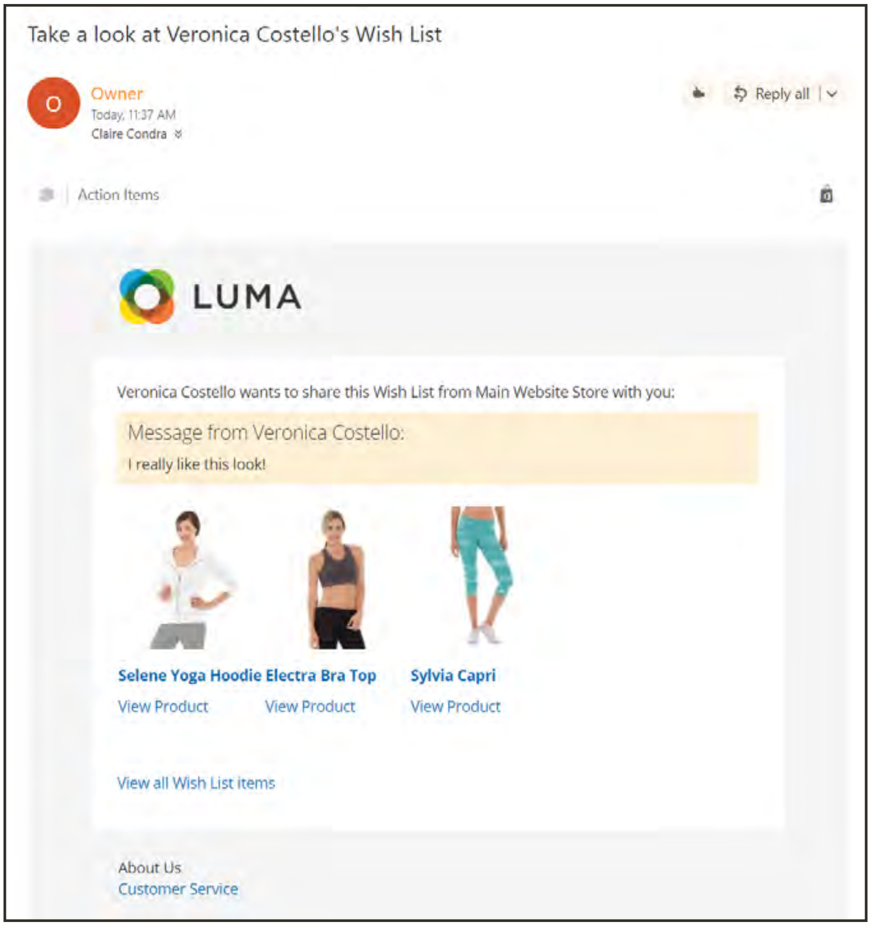
3. Add a **Message** to be included in the email.

4. Tap **Share Wish List**.



Share Your Wish List

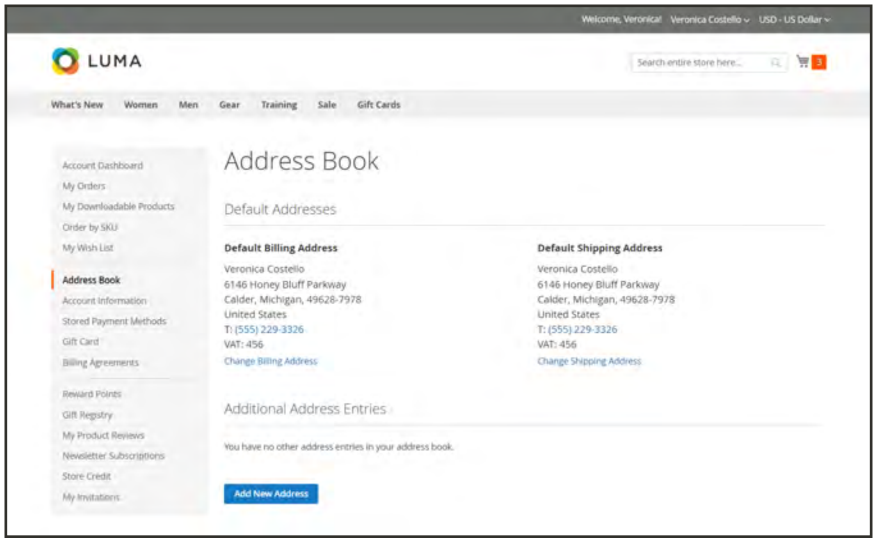
The message is sent from your primary store contact, and includes a thumbnail image of each product, with links to your store.



Shared Wish List Email

Address Book

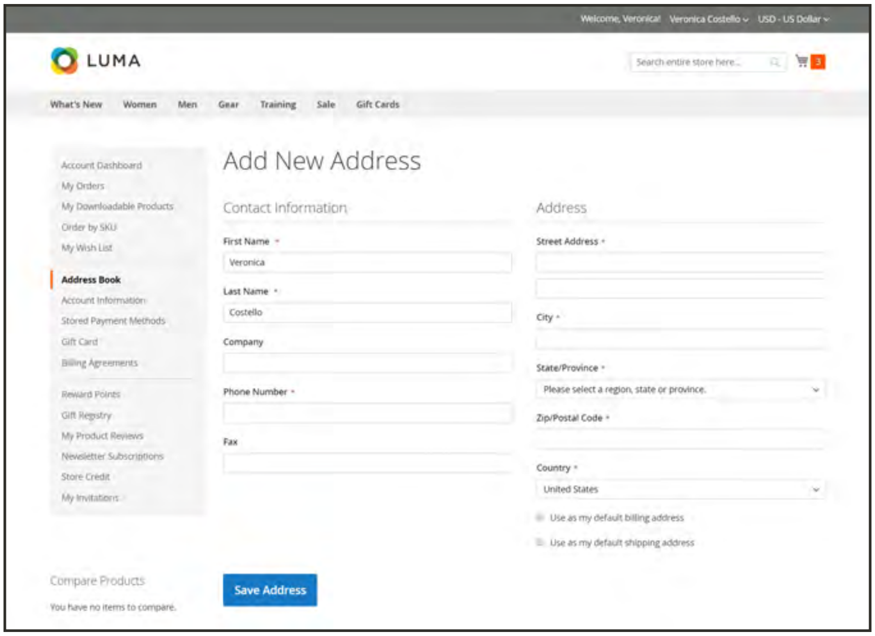
The Address Book contains the customer's default billing and shipping addresses, and any additional addresses that they frequently use when placing an order. To speed up the checkout process, make sure to enter any addresses that you frequently use.



Address Book

To add a new address:

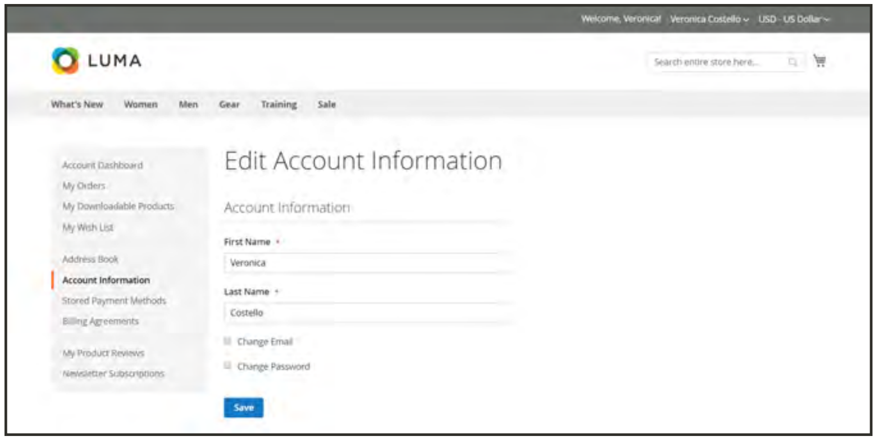
1. In the sidebar of your Account Dashboard, choose **Address Book**.
2. On the Address Book page, tap **Add New Address**.
3. Complete the contact and address information.
4. Mark the following checkboxes to indicate how the address is to be used.
   - Use as my default billing address
   - Use as my default shipping address
5. When complete, tap **Save Address**.



Address Book

Account Information

The basic account information includes your name and email address, and password, and can be maintained from your account dashboard.



Account Information

To update your account information:

In your Account Dashboard, choose **Account Information**. Then, do any of the following:

Update Your Name

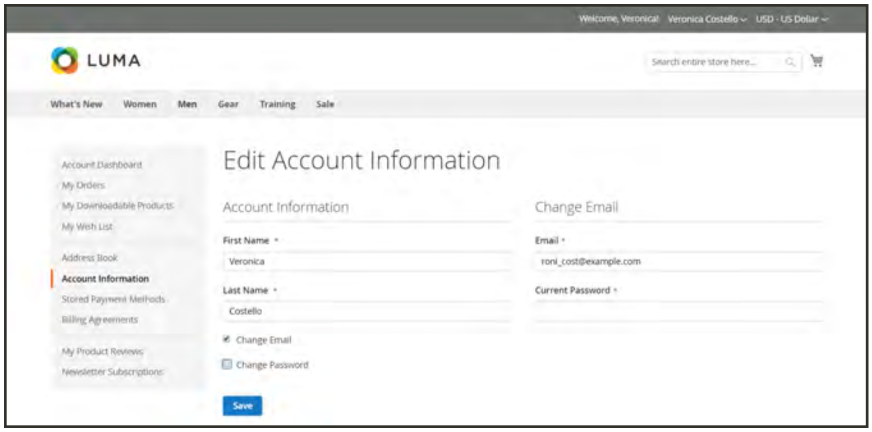
1. Update your **First Name** and **Last Name** as needed.

   Additional fields appear as part of the name if the Customer Configuration includes a prefix, middle initial, and suffix.

2. Tap **Save**.

Change Your Email Address

1. Mark the **Change Email** checkbox.
2. Enter your new **Email** address.
3. Enter your **Current Password**.
4. Tap **Save**.

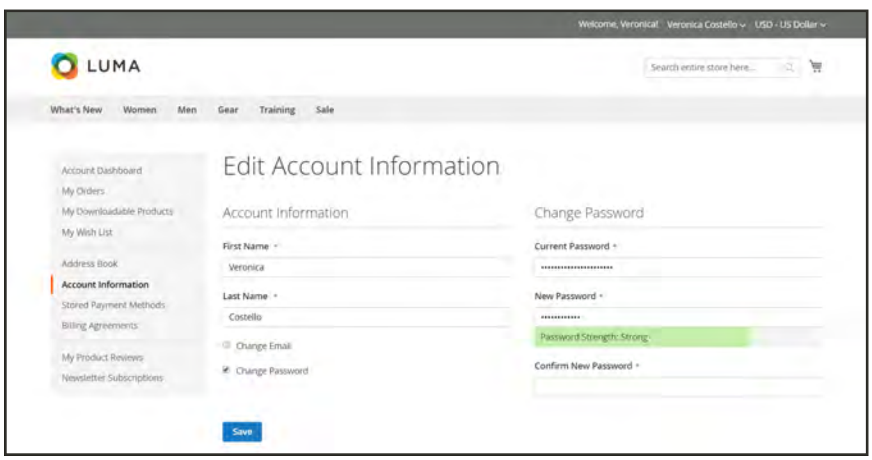


Change Email Address

Change Your Password

1. Mark the **Change Password** checkbox.
2. Enter your **New Password**.

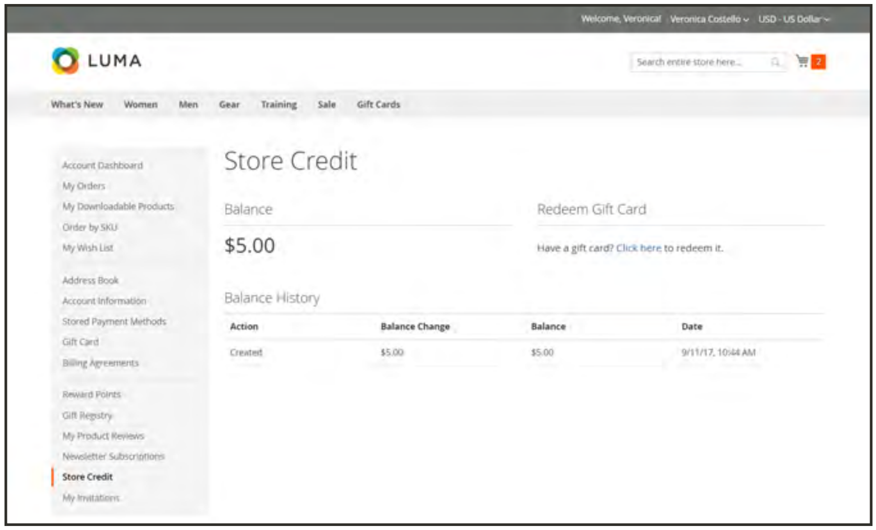
   Choose a strong password that is at least eight characters long. Your password can include a combination of upper and lowercase letters, numbers, and symbols. Use the password strength indicator to help you choose the best password. Then, write it down.
3. When you are ready, enter it again to confirm.



Change Password

Store Credit

The Store Credit section of your account dashboard lists amounts from returns and refunds that can be applied to future purchases. You can also redeem the value from a gift card.

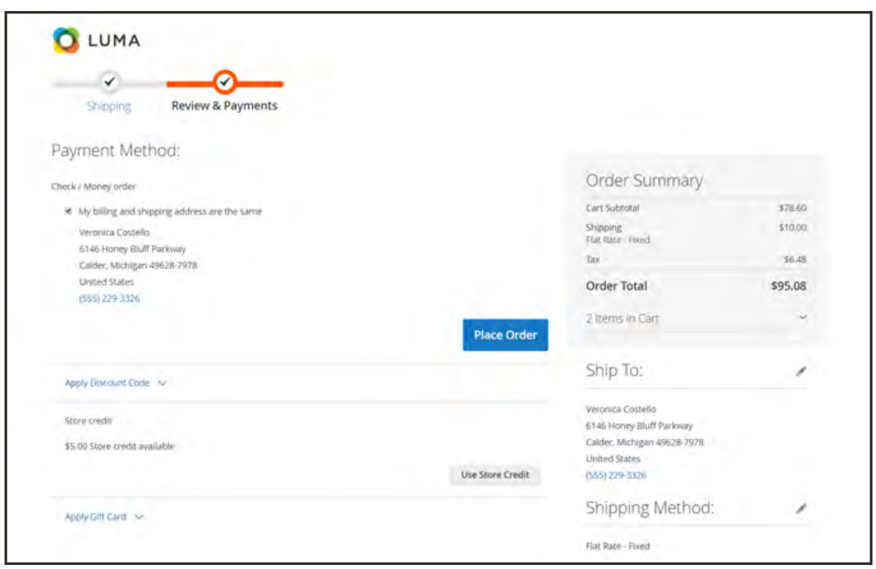


Store Credit

To apply store credit during checkout:

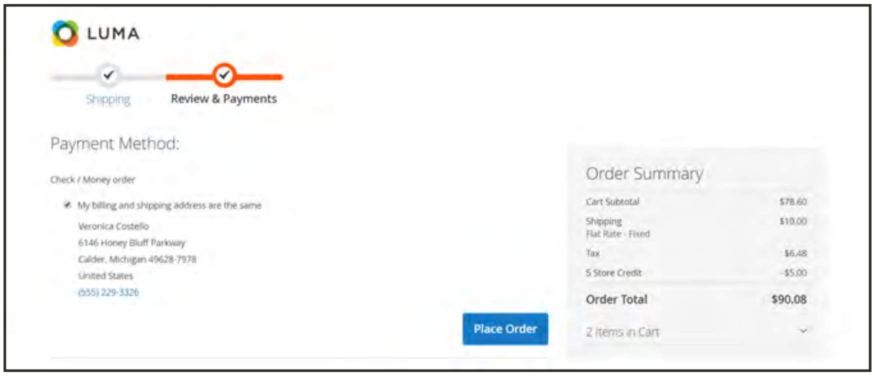
1. Determine the amount of available store credit. During the Review & Payments step, the available amount appears under Store Credit.

2. To apply the amount to the order, tap **Use Store Credit**.



Use Store Credit

The order total is recalulated, and the amount of store credit that is applied appears in the Order Summary.



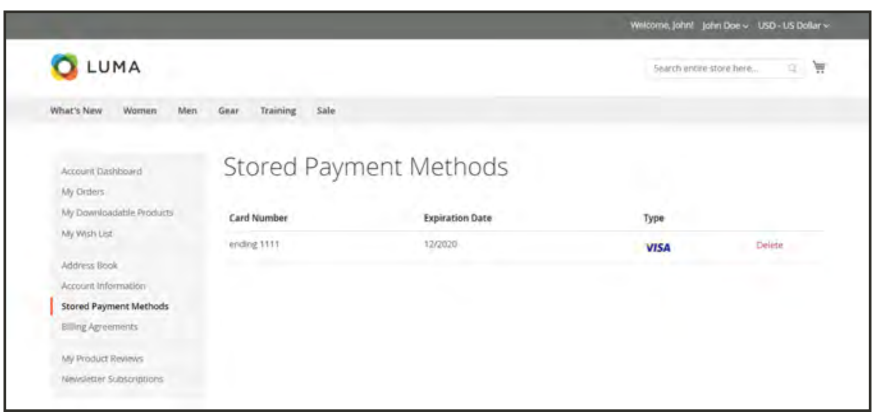
Order Summary with Store Credit

3. When ready, tap **Place Order**.

Stored Payment Methods

Customers with access to a secure vault for storing payment information can speed through checkout without entering their credit card information each time. If Instant Purchase is enabled, customers can bypass the two-step checkout process altogether, and place the order from the product page. A payment method that supports a secure vault, such as Braintree, is required.

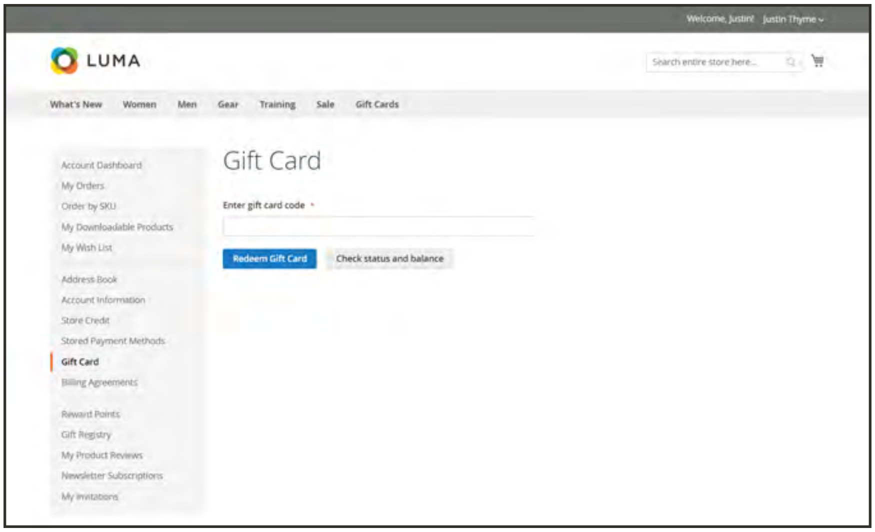
Stored payment methods are available only for payment methods such as Braintree, that offer a secure vault. When secure vault is enabled in the payment method configuration, customers will have the option during checkout to save their credit card information as a stored payment method. Customers can manage stored payment methods from their account dashboard.



Stored Payment Methods

Gift Card

The Gift Card section of your account dashboard can be used to check the balance of your gift card account, and redeem gift cards for store credit.



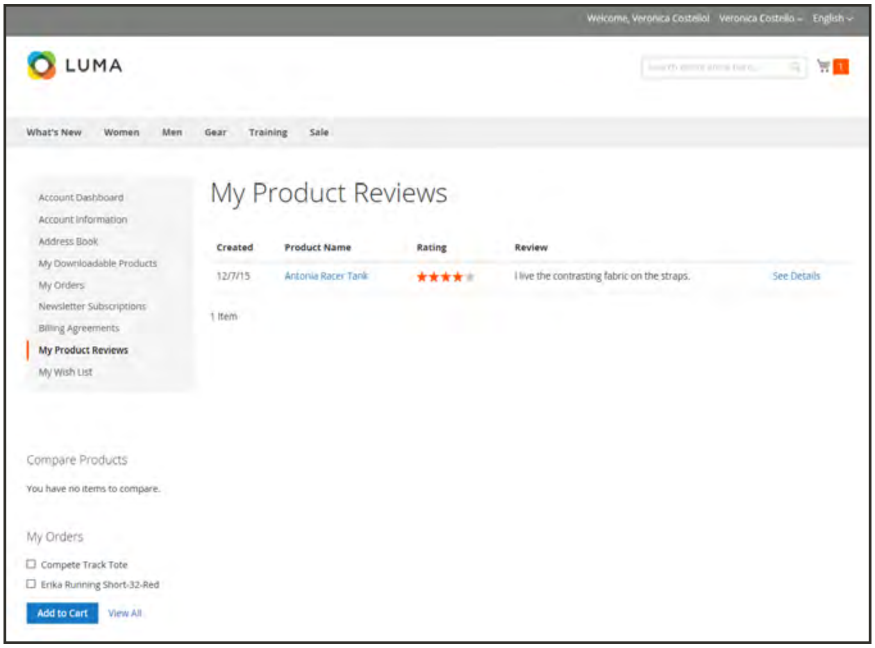
Gift Card

Billing Agreements

Customers who enter into a billing agreement with a payment provider can make purchases now and pay for them later, according to the agreement. To learn more, see: PayPal Billing Agreements.

My Product Reviews

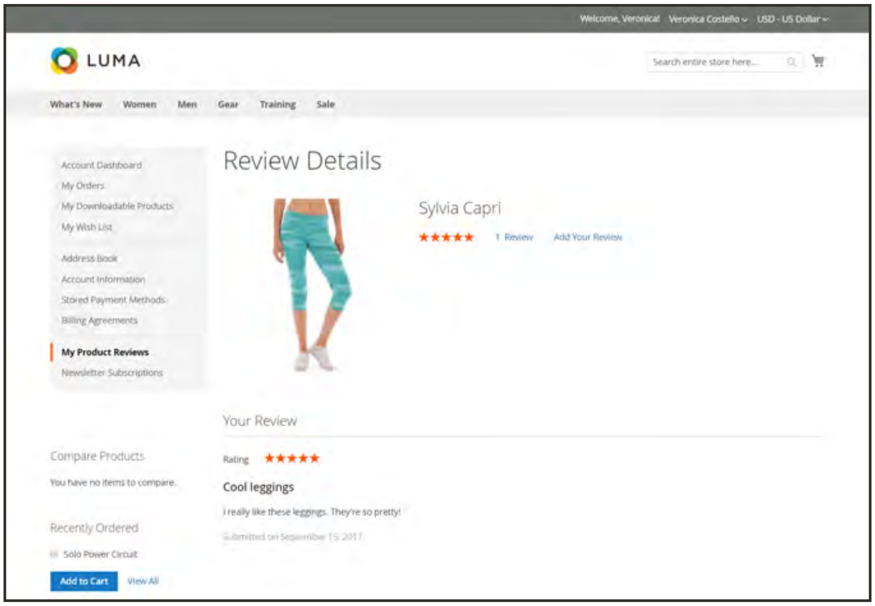
The My Product Reviews section of your account dashboard lists all the reviews that you have submitted from the storefront. Each review summary includes the date the review was submitted, and links to the product page, and review details.



My Product Reviews

To access your product reviews:

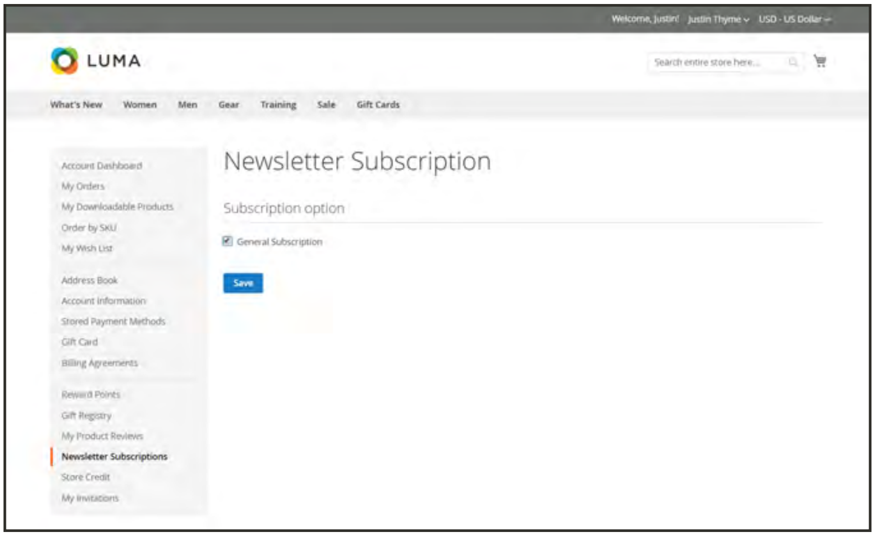
1. In the sidebar of your account dashboard, choose **My Product Reviews**.
2. To view the full review, click **See Details**.



Review Details

Newsletter Subscription

The Newsletter Subscription section of the account dashboard indicates if you are currently subscribed to the general newsletter. Customers can sign up to receive the company newsletter from the footer of the store. If the store doesn't currently publish a newsletter, it can build a subscription list for a future publication.

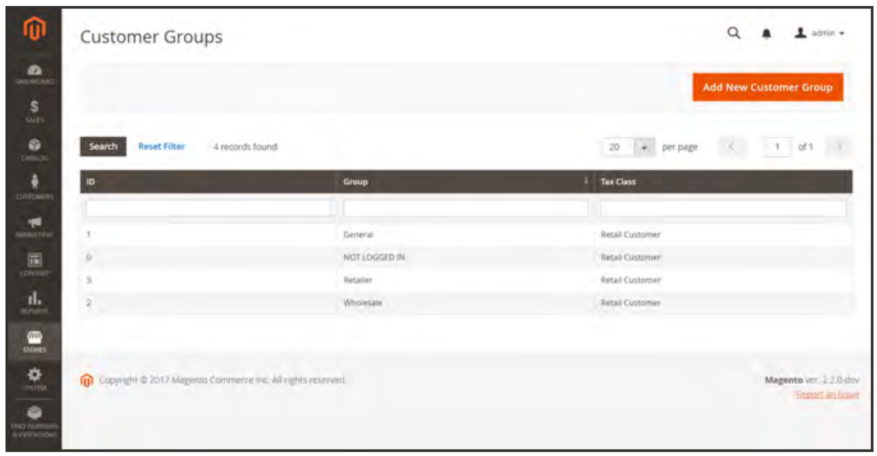


Newsletter Subscription

CHAPTER 55:

Customer Groups

Customer groups determine which discounts are available, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.



Customer Groups

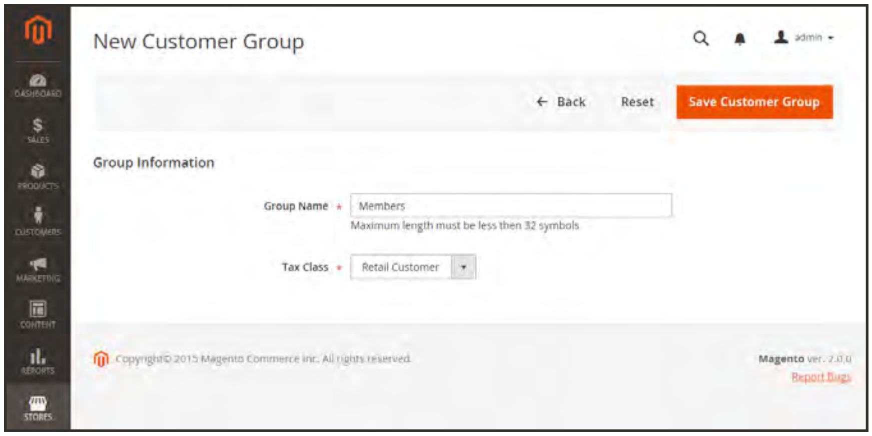
To create a customer group:

1. On the Admin sidebar, tap **Stores**. Then, choose **Customer Groups**.

2. Tap **Add New Customer Group**. Then, do the following:

   a. Enter a unique **Group Name** less than 32 characters to identify the group.

   b. Select the **Tax Class** that applies to the group.



Group Information

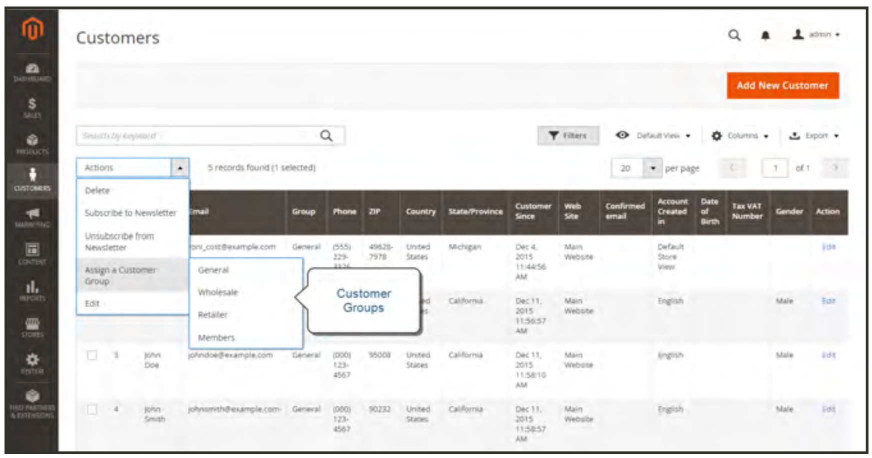
3. When complete, tap **Save Customer Group**.

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 prompted to confirm, tap **OK**.



Assign a Customer Group

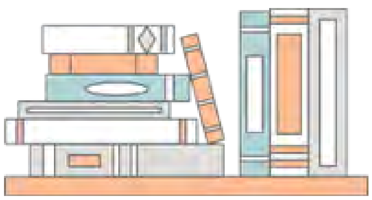
To delete a customer group:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Customer Groups**.
2. Open the record in edit mode.
3. In the button bar, tap **Delete Customer Group**.
4. When prompted to confirm, tap **OK**.
5. When complete, tap **Save Customer Group**.

CHAPTER 56:

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!

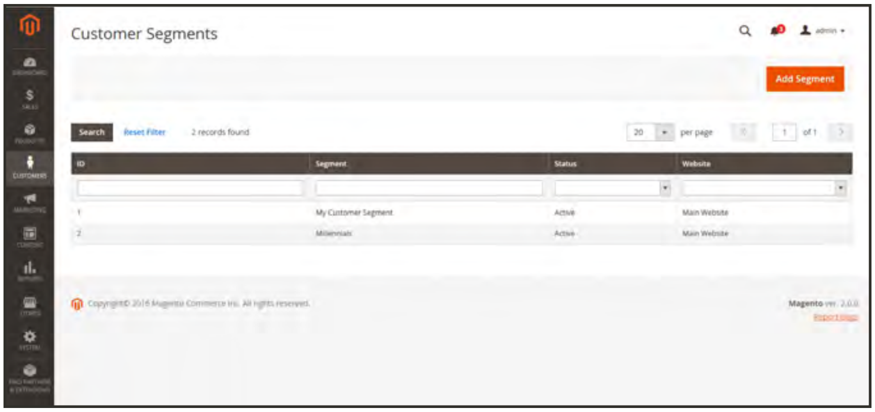
Customer Segment Attributes

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:

ATTRIBUTE	DESCRIPTION
Customer Address Fields	You can define any of the address fields, such as city or country. Any address in a customer’s address book can match these conditions for the customer to match. Or, you can specify that only the default billing or shipping addresses can be used to match a customer. Customer address attributes are available only for customers who are logged in to their accounts.
Customer Information Fields	Miscellaneous customer information can be defined, including Customer Group, name, email, newsletter subscription status, and Store Credit balance. Customer information is available only for customers who are logged in to their accounts.
Cart Fields	Cart properties can be based on either quantity (line items or total quantity) or the value (grand total, tax, gift card, etc.) of the cart contents.
Products	You can reference products that are currently in the shopping cart or wish list, or that have previously been viewed or ordered. You can also set a date range for when this occurred. The products are defined using product attributes.
Order Fields	Order characteristics for past orders can be defined based on the billing/shipping address in the order, the total or average amount or quantity of the orders, or the total number of orders. You can also set a date range for when this occurred, and the order status of the orders that match these conditions. Available only for customers who are logged in. Conditions that are set for shoppers who are not logged in stop working when they log in.

Creating a Customer Segment

Creating a customer segment is similar to building a cart price rule, except that the options include customer-specific attributes. The following example shows how to create a customer segment that targets Millenials.

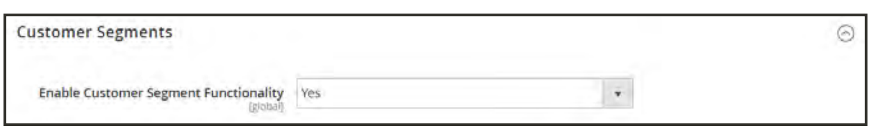


Customer Segments

> **Process Overview:**
>
> Step 1: Enable Customer Segments
>
> Step 2: Complete the General Setup
>
> Step 3: Describe the Conditions
>
> Step 4: Generate the List of Matched Customers

Step 1: Enable Customer Segments

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, tap **Customer Configuration**.
3. Expand the **Customer Segments** section.
4. Verify that **Enable Customer Segment Functionality** is set to "Yes."



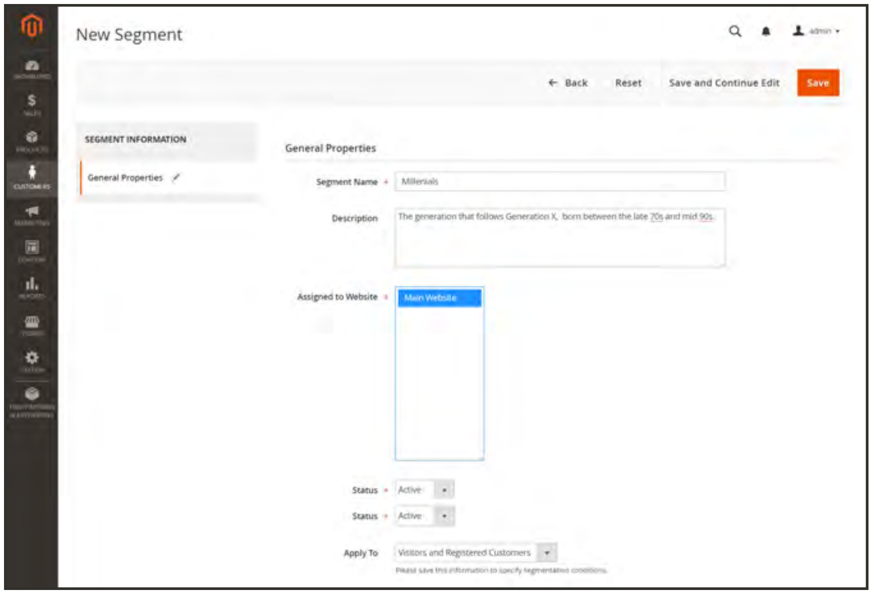
Customer Segments

5. When complete, tap **Save Config**.

Step 2: Complete the General Setup

1. On the Admin sidebar, tap **Customers**. Then, choose **Segments**.

2. In the upper-right corner, tap **Add Segment**. Then, do the following:



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.

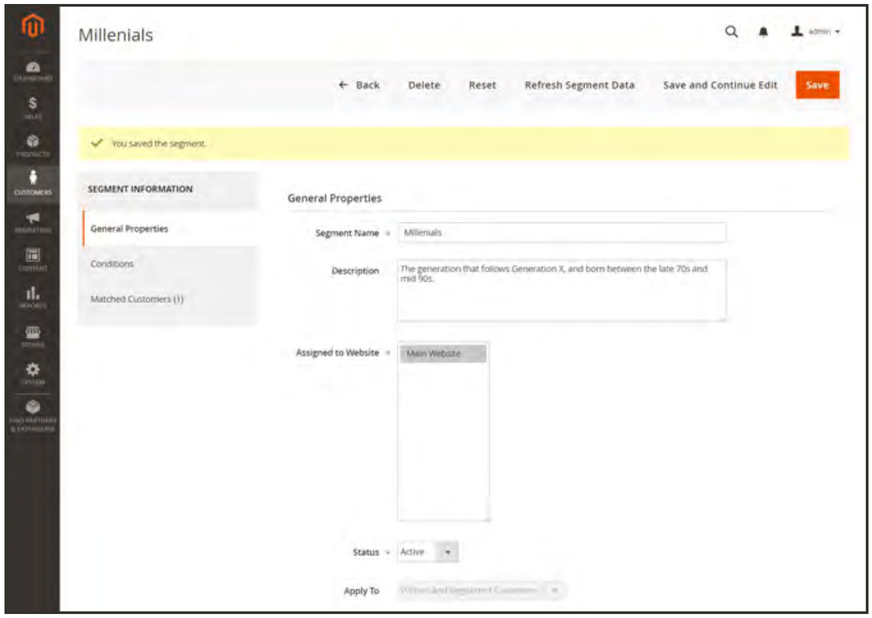
   c. Set **Assigned to Website** to the website where the customer segment can be used.

   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

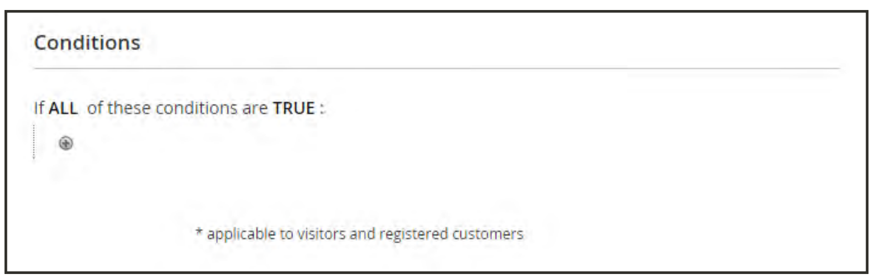
4. When complete, tap **Save and Continue Edit**. Additional options become available in the Segment Information panel.



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. In the condition after "Customer Date of Birth," click the **is** link. Then, 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.

Condition Line 1

d. On the next line, click **Add** ( ). Then, in the list under Customers, again select **Date of Birth**.

e. Click the **is** link, and select “equals or less than.”

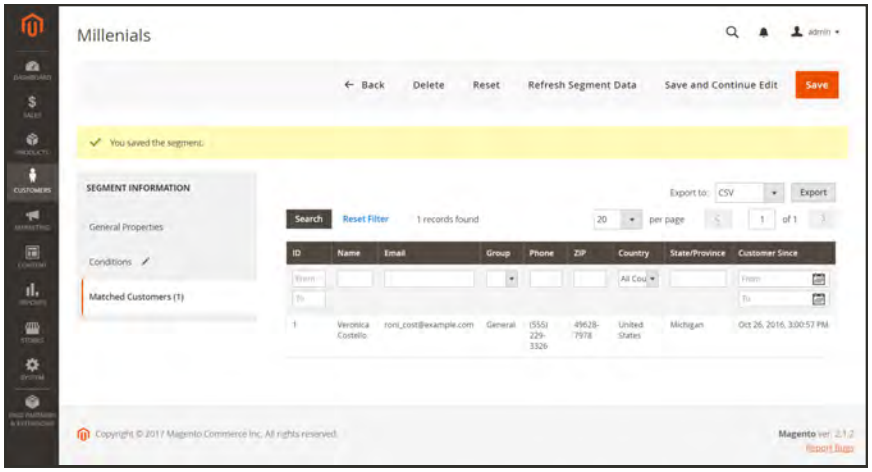
f. Replace the inserted date with the following: “1994-12-31”. Then, click the green checkmark ( ) to save the setting.

Condition for Millennium Generation

3. Tap **Save and Continue Edit**.

Step 4: Generate the List of Matched Customers

1. In the panel on the left, select **Matched Customers** to display all customers who match the condition.



Matched Customers(1)

2. When complete, tap **Save**.

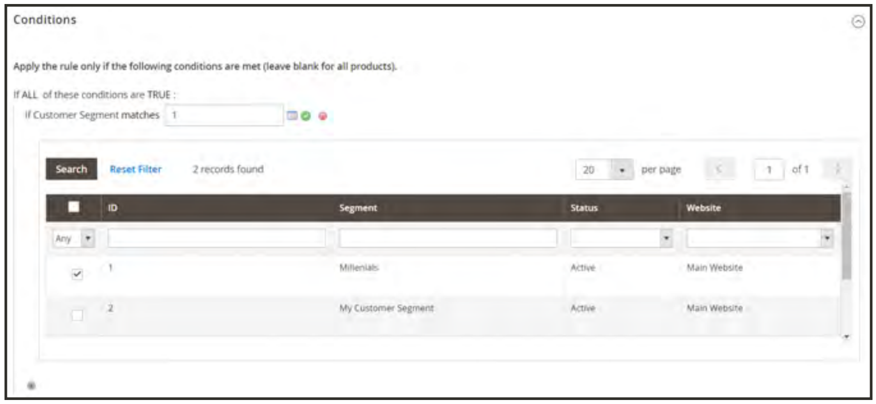
The customer segment can now be used for targeting promotions, content, and mailings.

Field Descriptions

FIELD	DESCRIPTION
Segment Name	A name that identifies the segment for internal reference.
Description	A brief description that explains the purpose of the segment for internal reference.
Assigned to Website	The single website where the segment can be used.
Status	Activates and deactivates the segment. Any associated price rules and banners are deactivated when the segment is disabled. Options include: Active / Inactive.
Apply to	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.

Customer Segments in Price Rules

A customer segment can be targeted by associating it with a cart price rule and banner.



Targeted Customer Segment

To target a segment with a cart price rule:

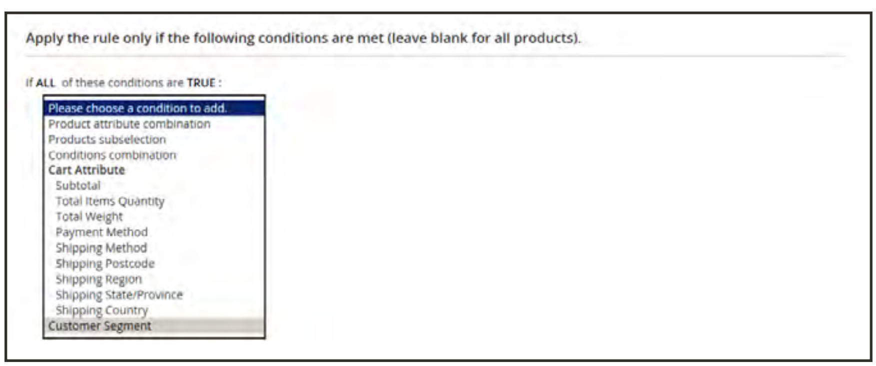
1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.

2. Do one of the following:

   - In the upper-right corner, tap **Add New Rule**.
   - Open an existing rule in edit mode.

3. Scroll down and expand the **Conditions** section. Then, complete the condition as follows:

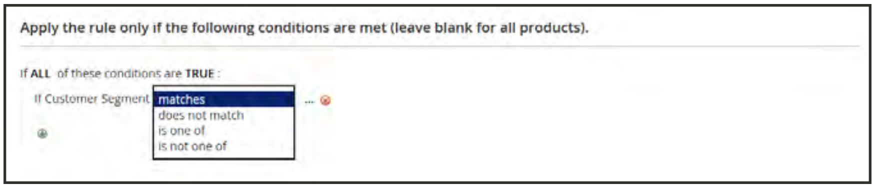
   a. Tap **Add** ( ) to display the list of conditions. Then, choose **Customer Segment**.



Customer Segment

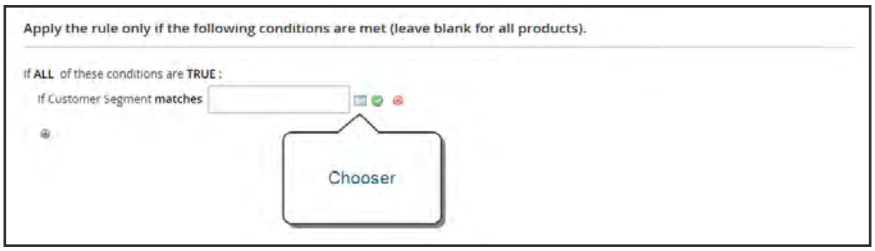
   b. By default, the condition is set to find a matching condition. If needed, click the **matches** link, and change the operator to one of the following:

- 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.



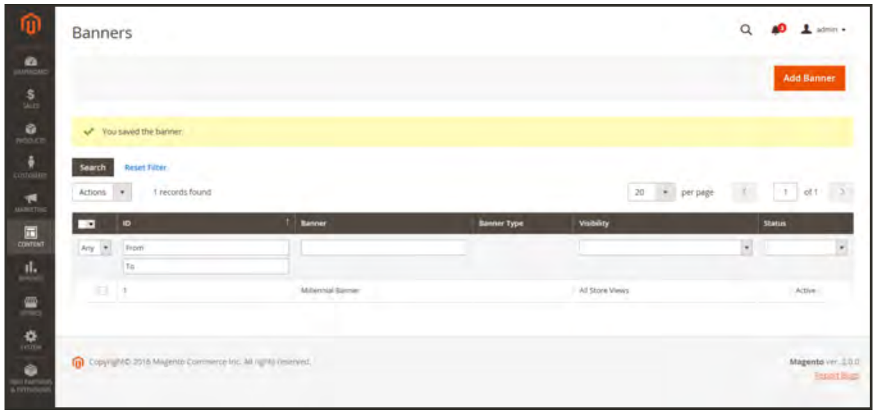
Chooser

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**.

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.

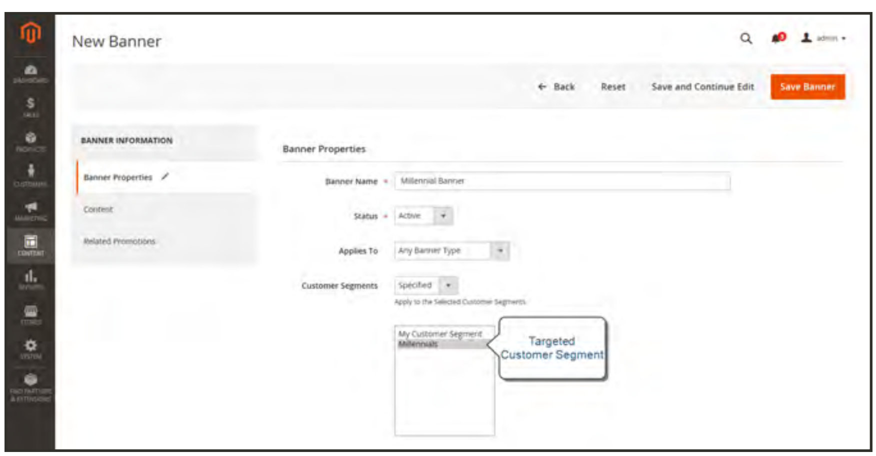


Banners

To associate a customer segment with a banner:

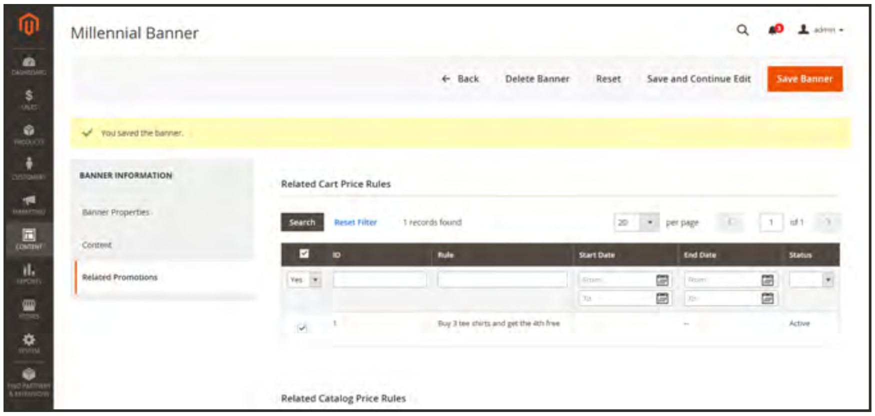
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Banners**.
   - In the upper-right corner, tap **Add Banner**.
   - Open an existing banner in edit mode.

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.

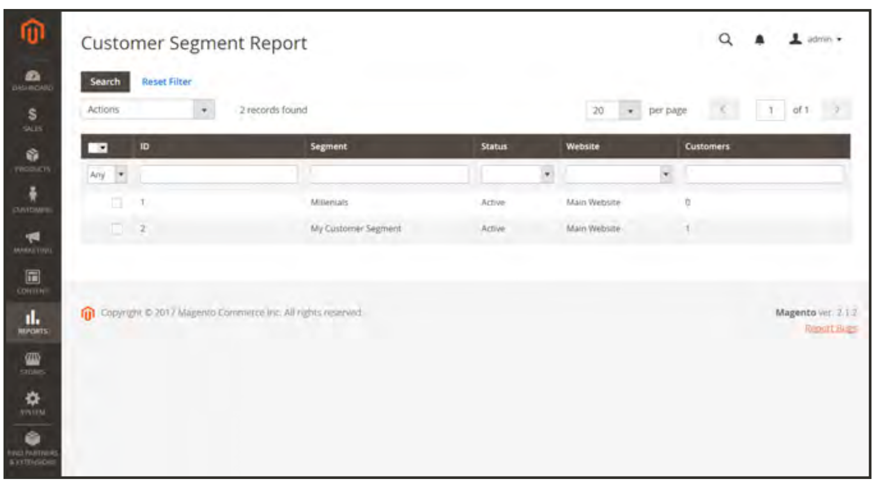


Related Promotions

4. Update the other banner settings as needed.
5. When complete, tap **Save Banner**.

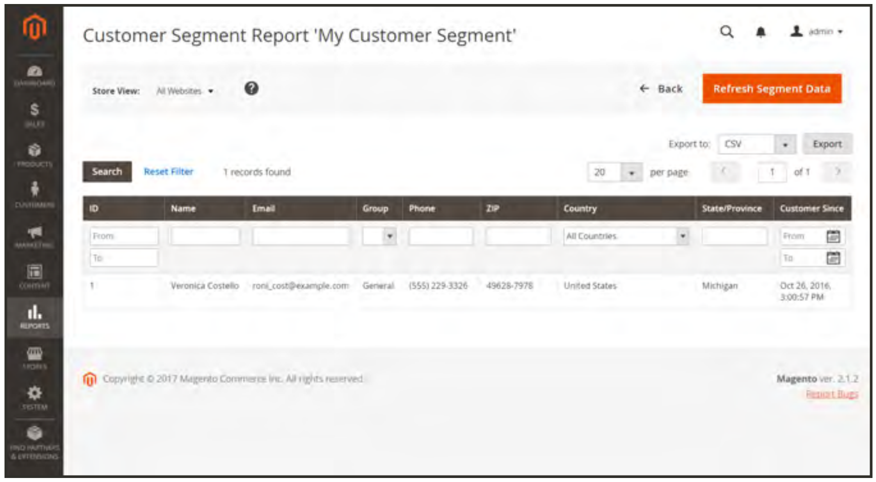
Customer Segment Report

The Customer Segment Report provides information about the number of customers in each segment.



Customer Segment Report

You can drill down to a list of customers in the segment, and export the data.



Drill Down to Customer Data

SALES

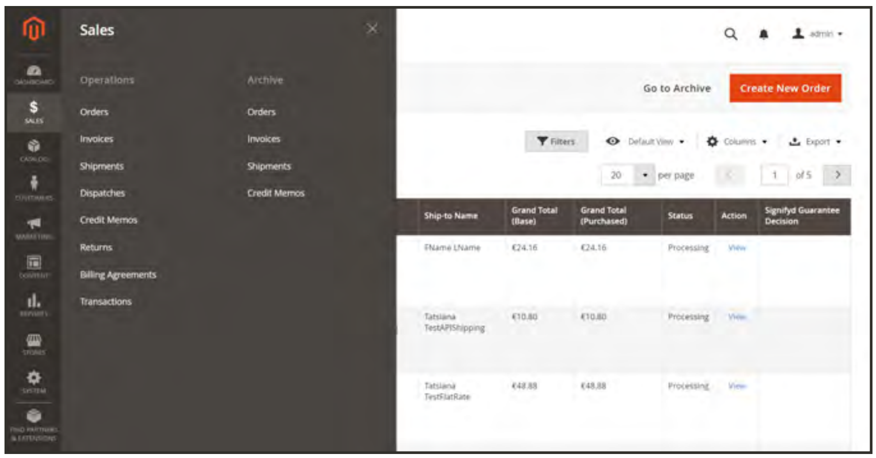
Contents

In this section of the guide, you'll learn how to manage all apsects of the order process, including point of purchase support, order processing, payments, and fulfillment.

CHAPTER 57:

Sales Menu

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of option as a different stage in the lifetime of an order.

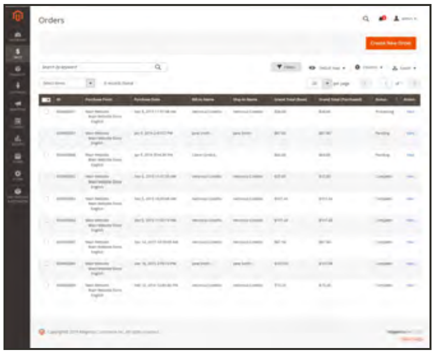


Sales Menu

To display the Sales menu:

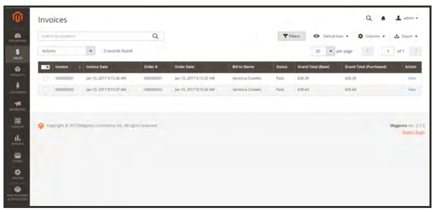
On the Admin sidebar, tap **Sales**.

Menu Options



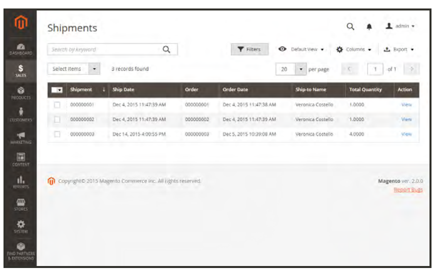
Orders

When an order is placed, a sales order is created as a temporary record of the transaction. Payment has not been processed, and
the order can still be canceled.



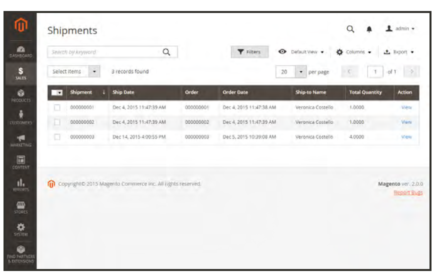
Invoices

An invoice is a record of the receipt of payment for an order. Multiple invoices can be created for a single order, each with as many, or as few of the purchased products that you specify. Depending on the payment action, payment can be automatically captured when the invoice is generated.



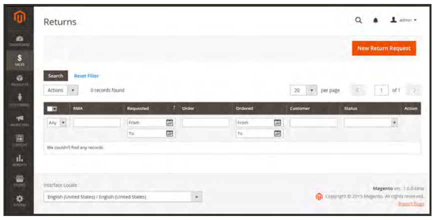
Shipments

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.



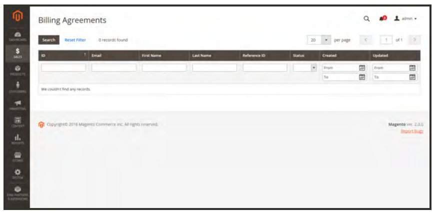
Dispatches

For Magento Shipping, lists shipments that are ready for pickup per carrier.



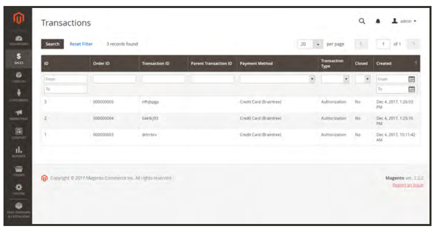
Returns

A returned merchandise authorization (RMA) can be granted to customers who request to return an item for replacement or refund. RMAs can be issued for Simple, Grouped, Configurable, and Bundle product types. However, RMAs are not available for virtual and downloadable products, or gift cards.



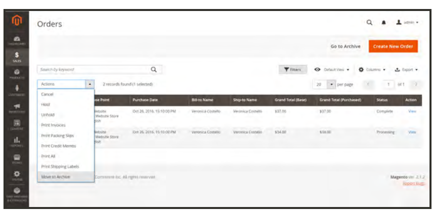
Billing Agreements

A billing agreement is similar to a purchase order, except that it isn't limited to a single purchase. During checkout, the customer chooses Billing Agreement as the payment method. A billing agreement streamlines the checkout process because the customer doesn't have to enter payment information for each purchase.



Transactions

The Transactions page lists all payment activity that has taken place between your store and all payment systems, and provides access to more detailed information.



Archive

Archiving orders and other sales documents on a regular basis improves performance and keeps your workspace free of unnecessary information.

Point of Purchase

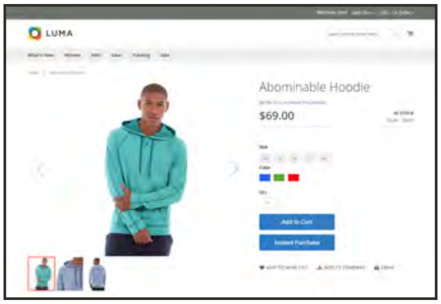
Contents

Magento reduces ordering errors by automatically verifying the SKU and availability of all items before an order is submitted. In this section of the guide, you'll learn how to configure the cart and checkout options, and offer assistance to your customers.

CHAPTER 58:

Instant Purchase

Instant Purchase allows customers to speed through the checkout process using information that is saved in their account. When enabled, the Instant Purchase button appears below the Add to Cart button on the product page for customers who meet the requirements.



Instant Purchase

Customer Requirements

- Customers are signed in to their accounts.
- Customer accounts have a default billing and shipping address.
- At least one shipping method is available for the country that is specified in the default shipping address.
- Customer accounts have a stored payment method with vault enabled. The following payment methods can be used to provide secure access to saved credit card information:

  Braintree Credit Cards*

  Braintree with PayPal Enabled

  PayPal Payflow Pro

  *Instant Purchase cannot be used with Braintree Credit Cards if 3D Secure is enabled.

To make an Instant Purchase:

1. In the storefront, go to the product page of the item to be purchased.
2. Select the required options, and tap **Instant Purchase**.

Instant Purchase Confirmation

3. Review the **Instant Purchase Confirmation** information. Then, tap **OK** to complete the transaction.

   A confirmation message and order number appears at the top of the product page.

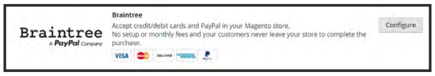
To configure Instant Purchase:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**. Then, do the following:

Configure Payment Method Vault

The following example shows how to configure the Braintree vault.

1. In the panel on the left, under **Sales**, choose **Payment Methods**.
2. In the **Braintree** section under Recommended Solutions, tap **Configure**. Then, do the following:



Configure Braintree

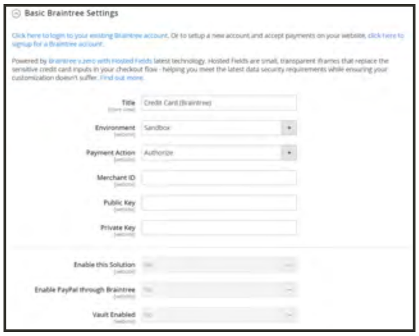
   a. In the **Basic Braintree Settings** section, enter the following information from your Braintree seller account:

   - Merchant ID
   - Public Key
   - Private Key

b. Set **Enable this Solution** to “Yes.”

c. If applicable set **Enable PayPal through Braintree** to “Yes.”

d. Set **Vault Enabled** to “Yes.”



Basic Braintree Settings

Enable Instant Purchase

1. In the panel on the left, under **Sales**, choose **Sales**.

2. Expand the **Instant Purchase** section, and do the following:

   a. Set **Enabled** to “Yes.”

   b. Enter the **Button Text** that you want to appear on the button.

   The button text can be changed for each store view, or language. By default, the button text is “Instant Purchase.”

Instant Purchase

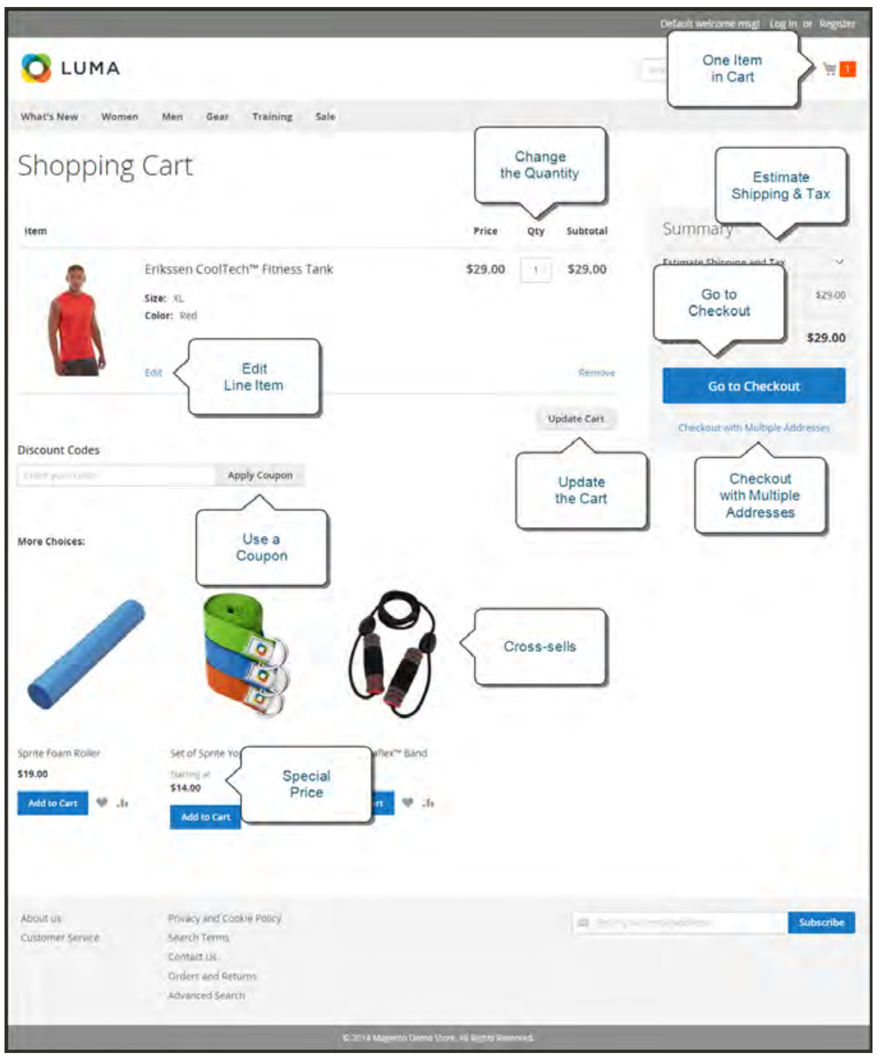
2. When complete, tap **Save Config**.

3. In the message at the top of the page, click **Cache Management**. Then in the upper-right corner, tap **Flush Magento Cache**.

CHAPTER 59:

Shopping Cart

The cart is positioned at the end of the path to purchase, at the intersection of “Buy” and “Abandon,” and is perhaps, the most important page in the store. The cart is where the order total is calculated, along with discount coupons and estimated shipping and tax. It’s a great place to show your trust badges and seals, and an ideal opportunity to offer one last item. You can choose the items to be offered as a cross-sell impulse purchase whenever a specific item appears in the cart.



Shopping Cart

Cart Configuration

The cart configuration determines the when the customer is redirected to the cart page, and which images are used for product thumbnails. You can require an order to reach a minimum amount before the checkout process begins, specify the number of days quoted prices remain valid, and specify the order of items in the Totals section.

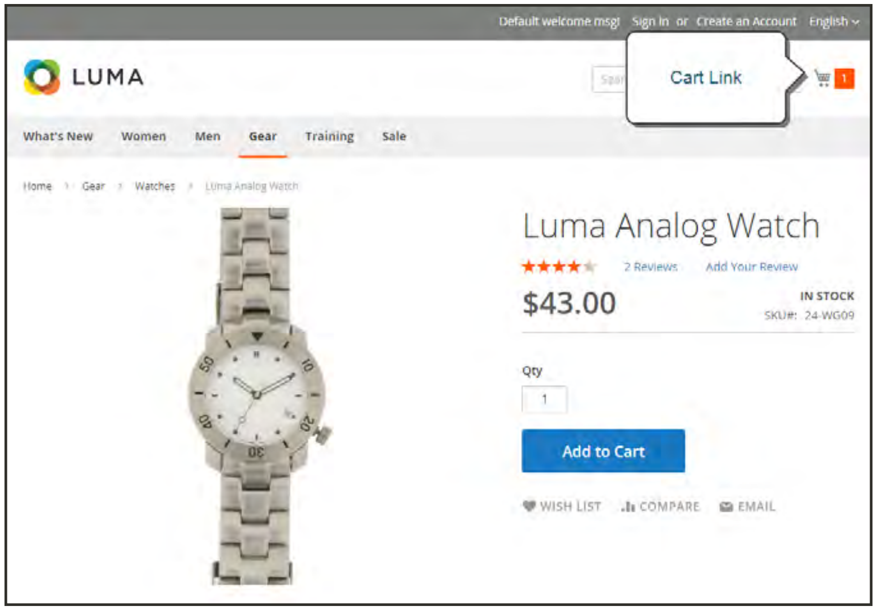
- My Cart Link
- Cart Sidebar
- Redirect to Cart
- Quote Lifetime
- Minimum Order Amount
- Cart Thumbnails

See also:

Checkout Configuration

My Cart Link

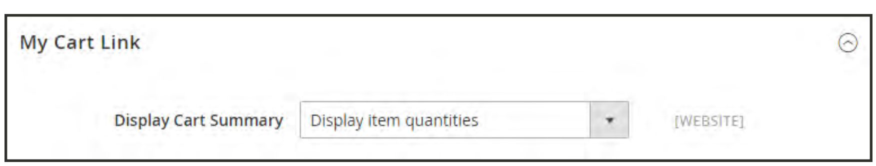
The cart link in the upper-right corner of the header gives a quick summary of the contents of the cart. The link can be configured to display the number of different products (or SKUs) in the cart, or the total quantity of all items. If the Shopping Cart Sidebar is enabled, you can click the link to display more detail.



Cart Link

To configure the cart link:

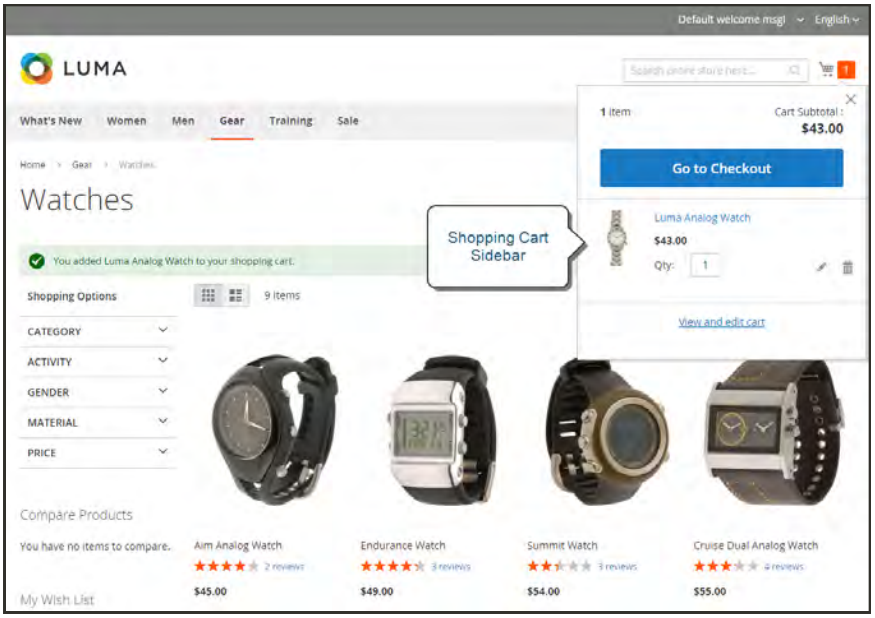
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **My Cart Link** section.
4. Set **Display Cart Summary** to one of the following:
   - Display item quantities
   - Display number of items (different products) in cart.
5. When complete, tap **Save Config**.



My Cart Link

Cart Sidebar

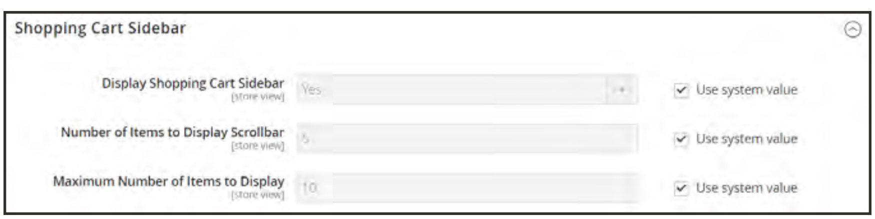
The Cart Sidebar is often called the "mini cart," and displays a summary of the items in the cart. It is enabled by default, and appears when you click the number of items in the Cart Link.



Shopping Cart Sidebar

To configure the mini cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart Sidebar** section. Then, do the following:



Shopping Cart Sidebar

   a. Set **Display Shopping Cart Sidebar** to your preference.
   b. In the **Maximum Display Recently Added Item(s)** field, enter the maximum number of recently added items that you want to appear in the mini cart.

4. When complete, tap **Save Config**.

Redirect to Cart

The shopping cart page can be configured to appear whenever an item is added to the cart, or only when customers choose to go to the page. The basic information about the items currently in the cart is always available in the mini cart, The decision is a matter of balancing the benefits letting customers continue shopping, with the benefit of encouraging customers to proceed to checkout. If might be simply a matter of personal preference. However, if you want back it up with numbers, you can run an A/B test to see which approach produces a higher conversion rate.

To configure when the cart appears:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Shopping Cart** section.
4. Set **After Adding a Product Redirect to Shopping Cart** to your preference.
5. Tap **Save Config**.

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.

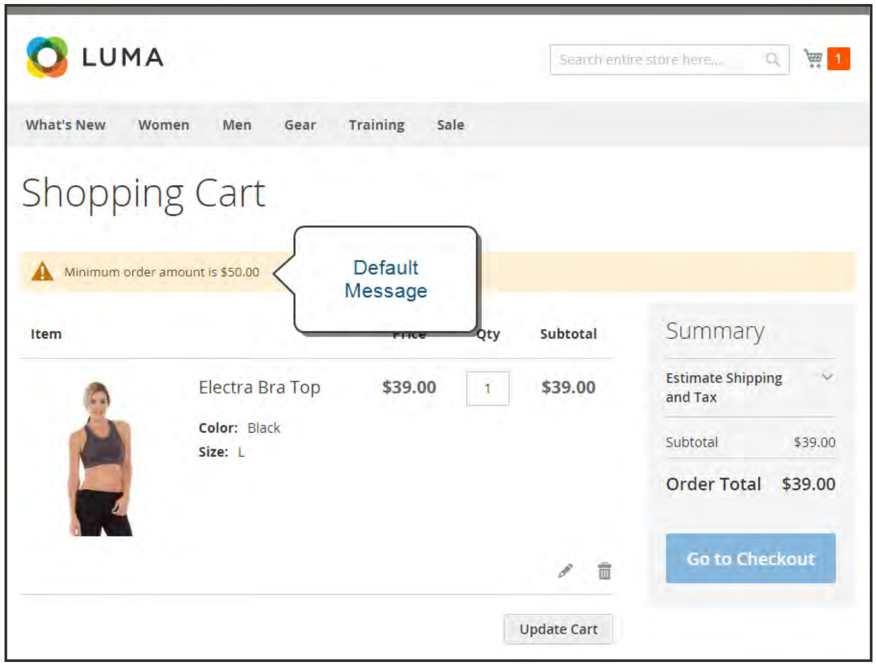
To configure the quote lifetime:

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

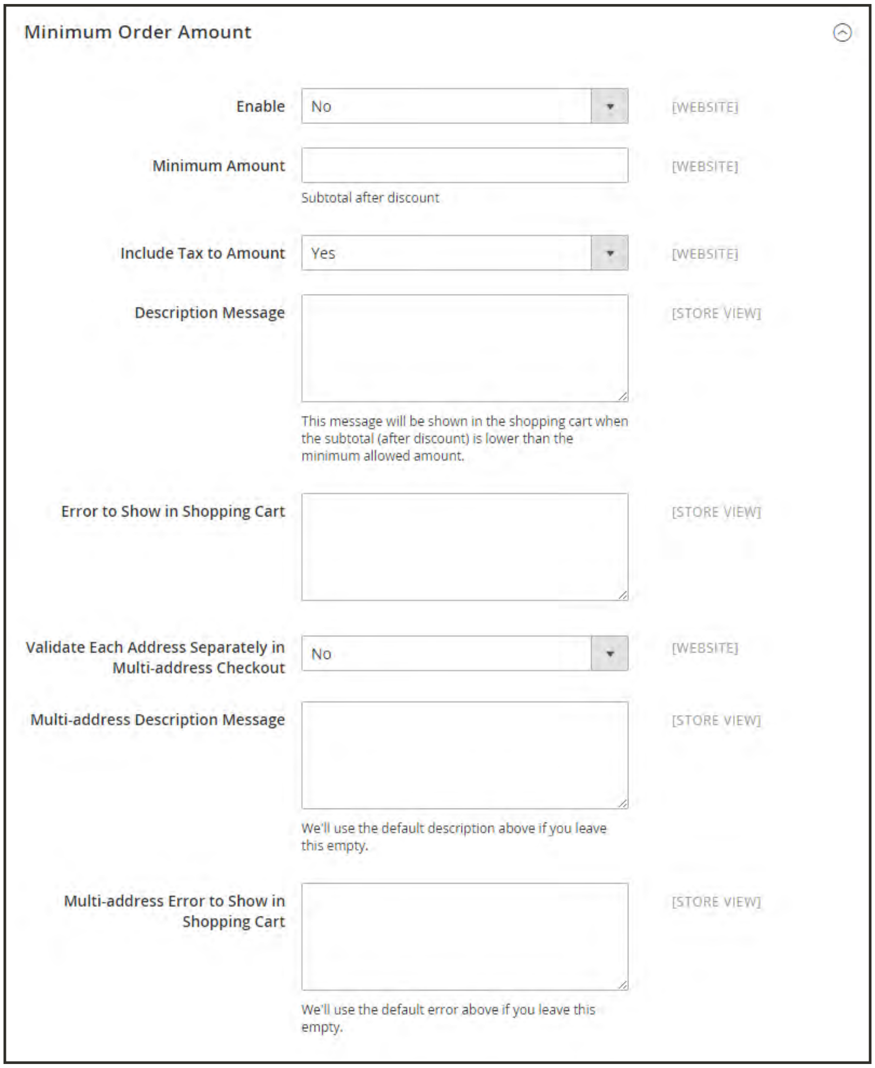
The configuration allows you to specify a minimum amount, after discounts are applied, that order subtotals are required to meet. Orders shipped to multiple address can be required to meet the minimum order amount per address. The Checkout button becomes available only after the minimum order amount 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. Set **Include Tax to Amount** to one of the following:

Yes	Requires the subtotal to meet the minimum amount with tax included.
No	Requires the subtotal to meet the minimum amount without tax.

d. To change the default message that appears at the top of the cart when the subtotal doesn't meet the minimum amount, enter the text in the **Description Message** box. Leave the box blank to use the default message.

e. To change the default error message, enter the text in the **Error to Show in Shopping Cart** box.

f. To require that each address in a multi-address order meet the minimum order amount, set **Validate Each Address Separately in Multi-address Checkout** to "Yes."

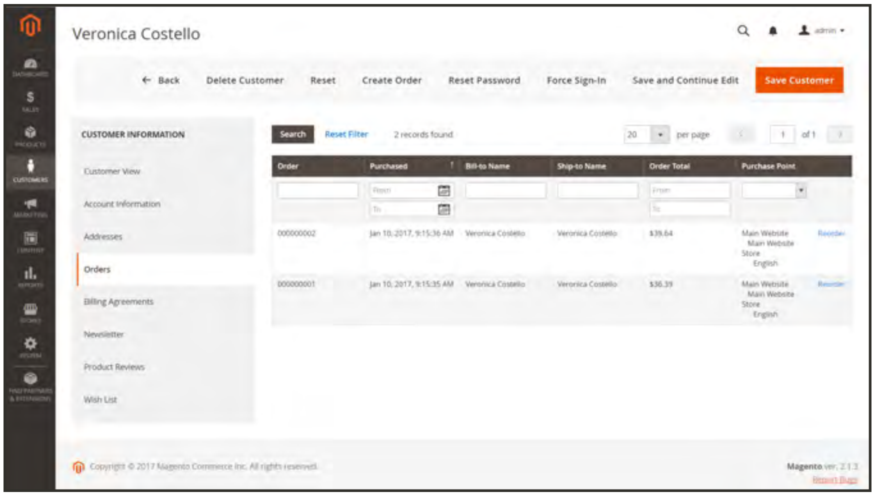
g. To change the default message at the top of the cart for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Description Message** box.

h. To change the default error message for orders that are to be shipped to multiple addresses, but do not meet the minimum, enter the text in the **Multi-address Error to Show in Shopping Cart** box.

4. When complete, tap **Save Config**.

Allow Reorders

When enabled, reorders can be made directly from the customer account or from the original order in the Admin. Reorders are enabled by default.



Customer Reorder Link in Admin

To configure customer reorders:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**.
3. Expand the **Reorder** section.

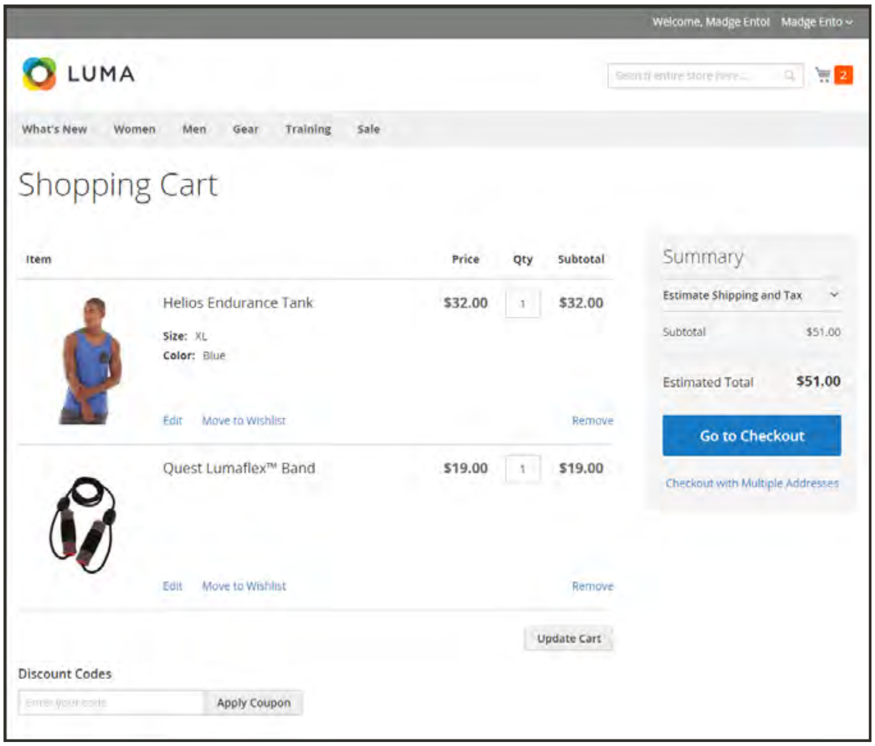
Reorder

4. Set **Allow Reorder** to your preference.

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

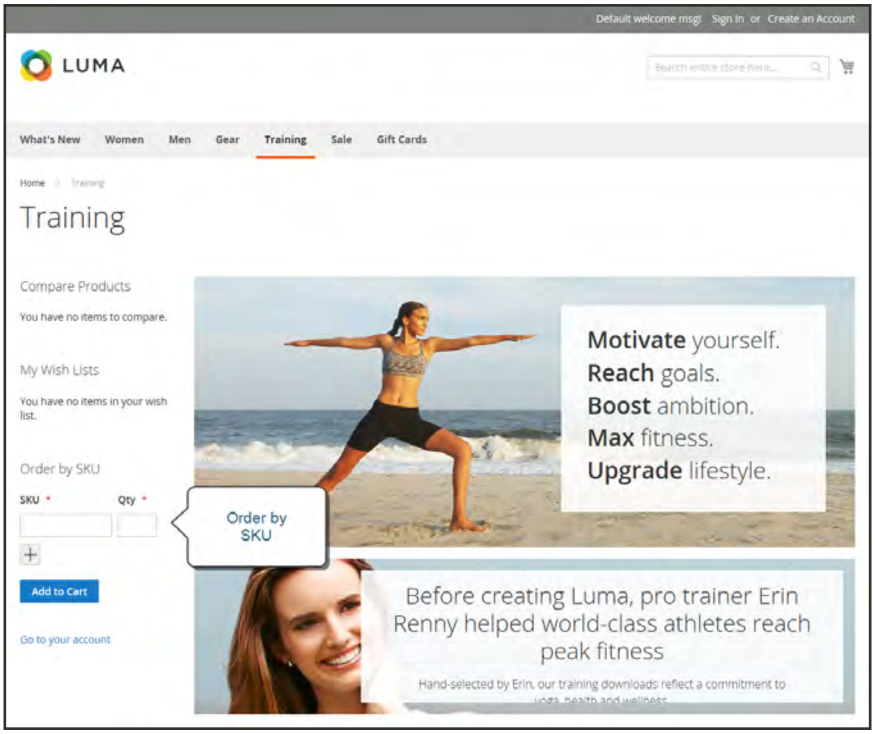
   a. Set **Grouped Product Image** to one of the following:
      - Product Thumbnail Itself
      - Parent Product Thumbnail

   b. Set **Configurable Product Image** to one of the following:
      - Product Thumbnail Itself
      - Parent Product Thumbnail

4. When complete, tap **Save Config**.

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:

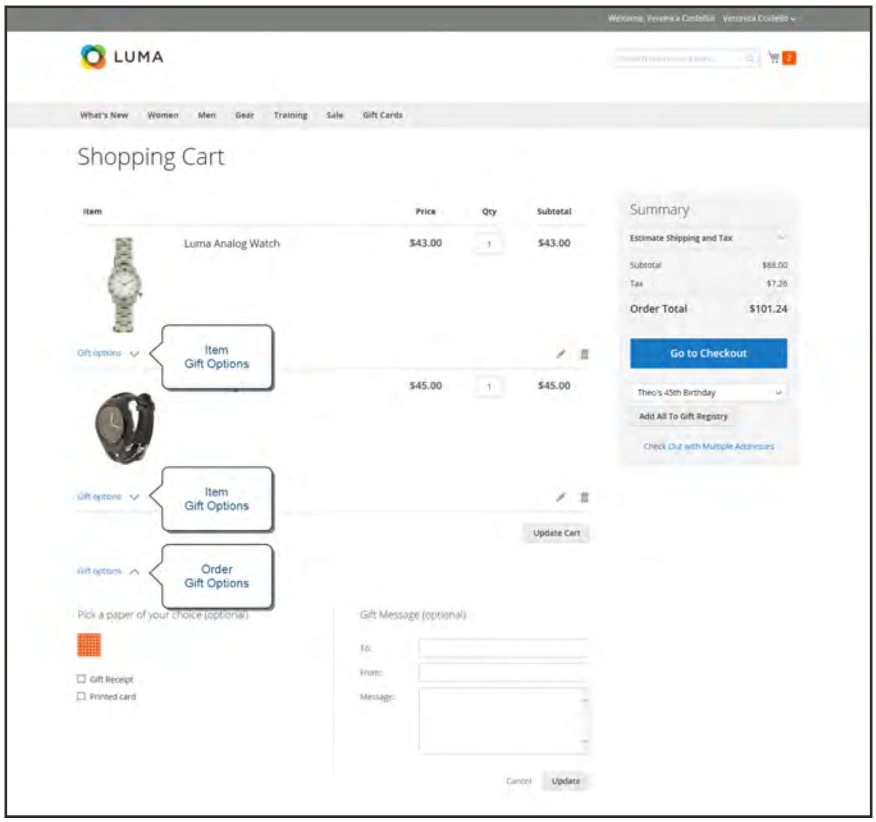
Yes, for Everyone	The Order by SKU block is available in the store for every shopper.
Yes, for Specified Customer Groups	Order by SKU is available only to members of a specific customer group, such as "Wholesale."
No	The Order by SKU block does not appear in the storefront, and the Order by SKU page is not available in the customer account.

Order by SKU Settings

When complete, tap **Save Config**.

Gift Options

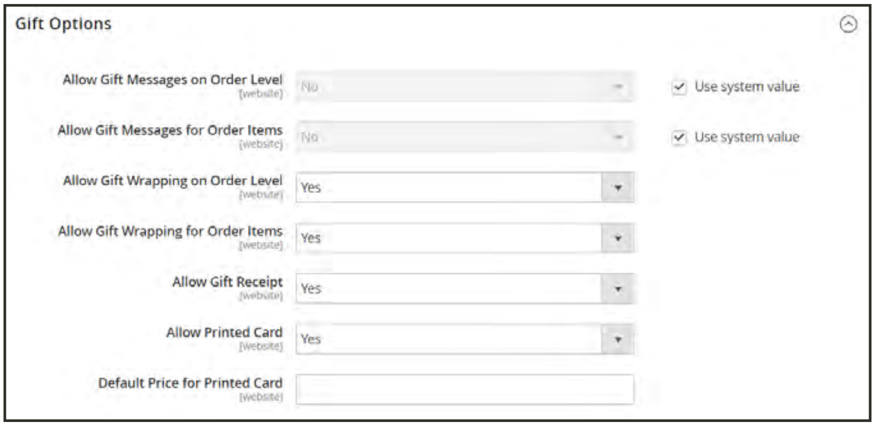
The selection of available gift options appears in the cart before the checkout process begins. The Gift Options configuration determines if customers can add a gift message or greeting card, and the gift wrapping that are available. Each item in the order can have a separate message and gift wrapping. When applied to the entire order, a gift receipt and greeting card can be added, as well. The Gift Options configuration applies to the entire website, but can be overridden at the product level.



Gift Options in Shopping Cart

To enable gift options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Sales**. Then, expand the **Gift Options** section.



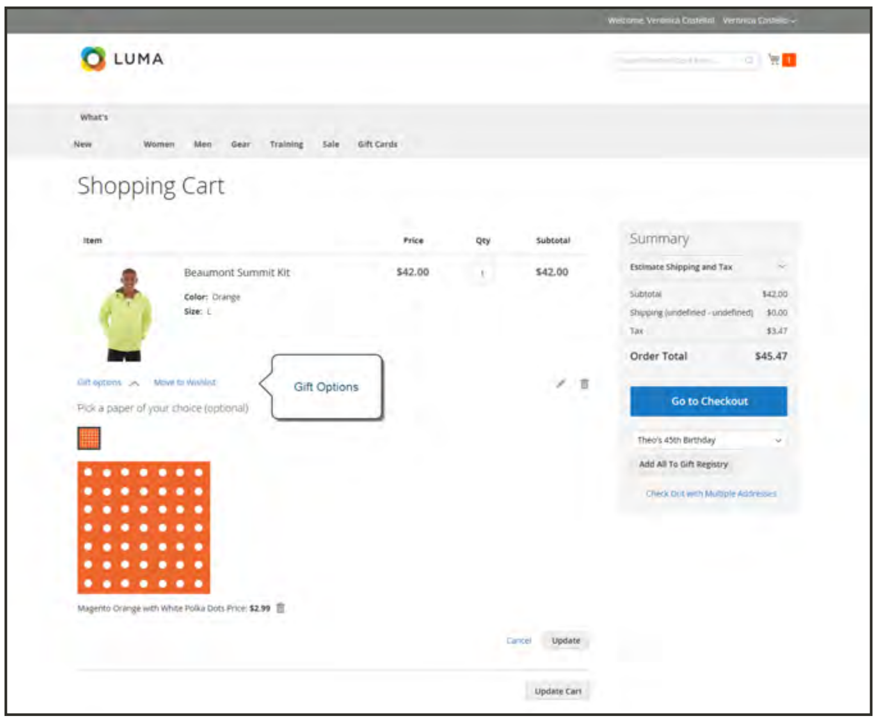
Gift Options

3. Set the **Gift Message** options according to your preference:
   - Allow Gift Messages on Order Level
   - Allow Gift Messages for Order Items
4. Set the **Gift Wrapping** options according to your preference:
   - Allow Gift Wrapping on Order Level
   - Allow Gift Wrapping for Order Items
5. To give customers the option to include a gift receipt with their orders, set **Allow Gift Receipt** to “Yes.”
6. To give customers the option to include a printed card with their orders, set **Allow Printed Card** to “Yes.” Then, enter the **Default Price for Printed Card**.
7. When complete, tap **Save Config**.

Gift Wrap

Gift wrapping is available for any product that can be shipped, and can be offered for individual items or for the entire order. You can charge a separate price for each gift wrap design, and upload a thumbnail image of the design that appears as an option for the product in the cart. When the gift wrap thumbnail is clicked, a full-size image appears. During checkout review, the gift wrap charge appears with the other checkout totals in the Order Summary section.

The gift wrap image should be a swatch that shows the repeating pattern, and can also include a sample of the ribbon that is to be used. You can either scan the paper, or take a photograph of a wrapped package. The uploaded image can be GIF, JPG, or PNG image, and should be square. .In the following example, the uploaded gift wrap image is 230 x 230 pixels.



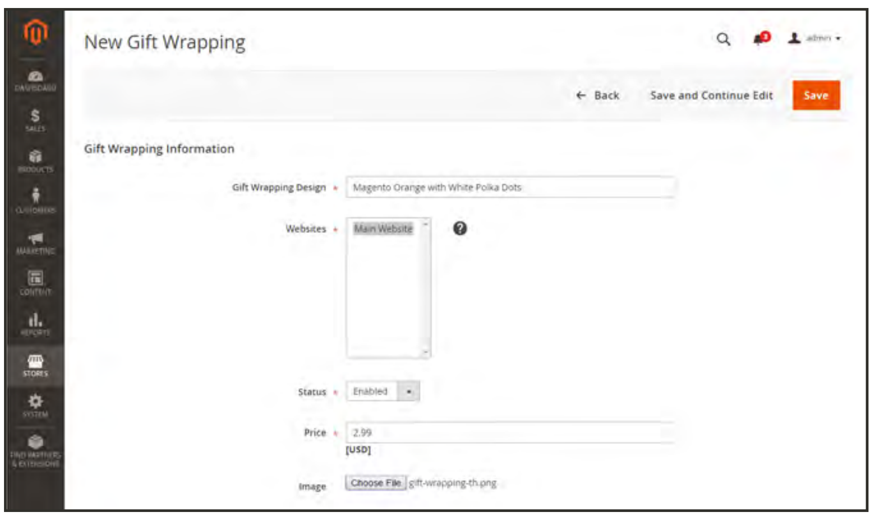
Gift Options in Cart

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.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Websites		Select the websites where the new gift wrap will be available.
Status	Global	Determines if gift wrapping is available. Options: Enabled / Disabled.
Price	Global	Specifies the price of the gift wrap option. This setting can be overridden by the gift wrap price set at the product level.
Image	Global	Uploads a thumbnail image of the gift wrap design that appears next to the gift wrap option.

Gift Options Tax

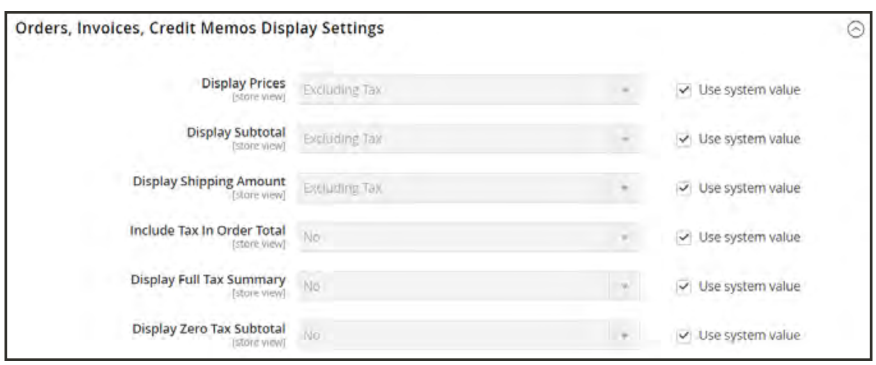
Gift wrapping and printed gift card prices can be configured to include or exclude tax, or to display both options. You can also specify a tax class for these items, at either the global or website level.

To configure gift options taxes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Tax**.
3. Expand the **Tax Classes** section. Then, set **Tax Class for Gift Options** to the applicable tax class.

Tax Classes

4. Expand the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following:



Orders, Invoices, Credit Memos Display Settings

a. Set **Display Gift Wrapping Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

b. Set **Display Printed Gift Card Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

5. When complete, tap **Save Config**.

Persistent Cart

A persistent shopping cart keeps track of unpurchased items which are left in the cart, and saves the information for the customer's next visit. Customers who are "remembered" can have the contents of their shopping carts restored the next time they visit your store.

Using a persistent shopping cart can help reduce the number of abandoned shopping carts and increase sales. It is important to understand that the persistent shopping cart does not expose sensitive account information at any time. While the persistent shopping cart is use, both registered customers and guest shoppers are required to either log in to an existing account, or create a new account before going through checkout. For guest shoppers, a persistent shopping cart is the only way to retrieve information from a previous session.

To use the persistent shopping cart, the customer's browser must be set to allow cookies. During operation, the following cookies are used:

Session Cookie

A short-term session cookie exists for the duration of a single visit to your site, and expires when the customer leaves, or after a set period of time.

Persistent Cookie

A long-term persistent cookie continues in existence after the end of the session, and saves a record of the customers' shopping contents for future reference.

When using a persistent cart, it is recommended that you set the lifetime of the server session and the session cookie to a long period of time. To learn more, see: Customer Session Lifetime.

Persistent Cart Workflow

When Persistent Shopping Cart is enabled, the workflow depends on the values of the "Enable Remember Me" and "Clear Persistence on Log Out" settings, the customer's decision to select or clear the "Remember Me" checkbox, and when the persistent cookie is cleared.

When a persistent cookie is applied, a Not %Jane Smith%? link appears in the page header, to give the customer the ability to terminate the persistent session and start working as a guest, or log in as a different customer. The system retains a record of the shopping cart contents, even if the customer later uses different devices to shop in your store. For example, a customer can add an item to the shopping cart from a laptop, edit the cart contents from a desktop computer, add more items from a mobile device, and complete the checkout process from a tablet.

There is a separate independent persistent cookie for each browser. If the customer uses multiple browsers while visiting your store during a single, persistent session, any changes made in one browser will be reflected in any other browser when the page is refreshed. While the persistent shopping cart is enabled, your store creates and maintains a separate persistent cookie for each browser that is used by a customer to log in or create an account.

An Open Session on a Shared Computer

Jane is finishing up her holiday shopping with a persistent session, and adds a present for John to her cart, as well as something for her mother. Then she goes to the kitchen for some milk and cookies.

John sits down at the computer to do some quick shopping while Jane's in the kitchen. Without noticing the "Not %Jane%" link at the top of the page, he finds a nice present for Jane and adds it to the cart. When he goes to checkout and logs in as himself, both the items in Jane's cart are added to his cart. John's in such a hurry that he doesn't notice the additional item during Order Review, and submits the order. Jane's cart is now empty, and John bought presents for both Jane and her mother.

Jane brings John some milk and cookies, and asks, "What's up?" He says, "Oh, nothing."

Remember Me

Customers can click the "Remember Me" checkbox on the Login page to save the contents of the their shopping carts.

Yes A persistent cookie is created, and the contents of the shopping cart is saved for the customer's next logged-in session.

No If "Remember Me" is not selected or is cleared, a persistent cookie is not created, and the cart information is not saved for the customer's next logged-in session.

Continue Persistence on Logout (No)

No When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.

No When the customer logs out, the session cookie is deleted, but the persistent cookie remains in effect. The next time the customer logs in, the cart items are restored, or added to any new items that have been placed in the cart.

No If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

Clear Persistence on Logout (Yes)

Yes When the customer logs in, the persistent cookie is invoked, in addition to the session cookie which is already in use.

Yes When the customer logs out, both cookies are deleted.

Yes If the customer does not log out, but the session cookie expires, the persistent cookie remains in effect.

Persistent Cart Settings and Effects

SETTINGS	EFFECT
Enable Remember Me = “No” Clear Persistence on Log Out = any value	The Remember Me checkbox is not available on the login and registration page. The persistent cookie is not used.
Enable Remember Me = “Yes” Clear Persistence on Log Out = any value Remember Me (not selected)	The session cookie is applied as usual; the persistent cookie is not used.
Enable Remember Me = “Yes” Clear Persistence on Log Out = “Yes” Remember Me = “Yes”	When a customer logs in, both cookies are applied. When a customer logs out, both cookies are deleted. If a customer does not log in, but the session cookie expires, the persistent cookie is still used. Apart from logging out, the persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.
Enable Remember Me = “Yes” Clear Persistence on Log Out = “No” Remember Me = “Yes”	When a customer logs in, both cookies are applied. When a customer logs out, the session cookie is deleted, the persistent session continues. The persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.

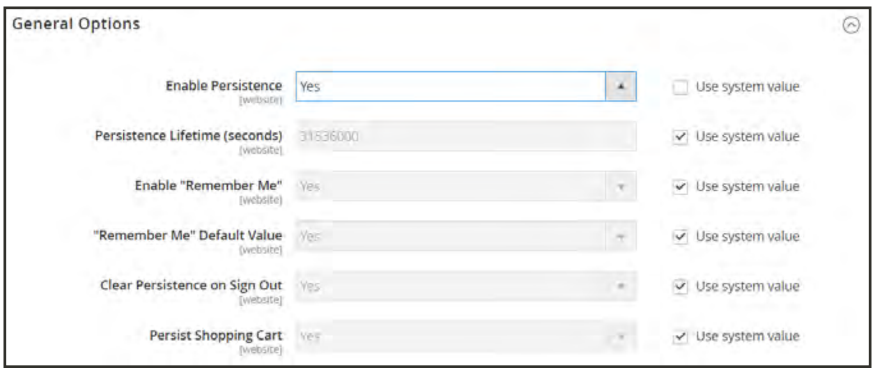
Configuring a Persistent Cart

During the setup of a persistent shopping cart, you can specify the lifetime of the cookies, and which options you want to make available for various customer activities.

> If the session cookie expires while the customer is logged in, the persistent cookie remains active.

To configure a persistent cart:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Persistent Shopping Cart**.
3. If necessary, expand the **General Options** section.
4. To enable the persistent shopping cart and display additional options, set **Enable Persistence** to "Yes." Then, do the following:



General Options

   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.

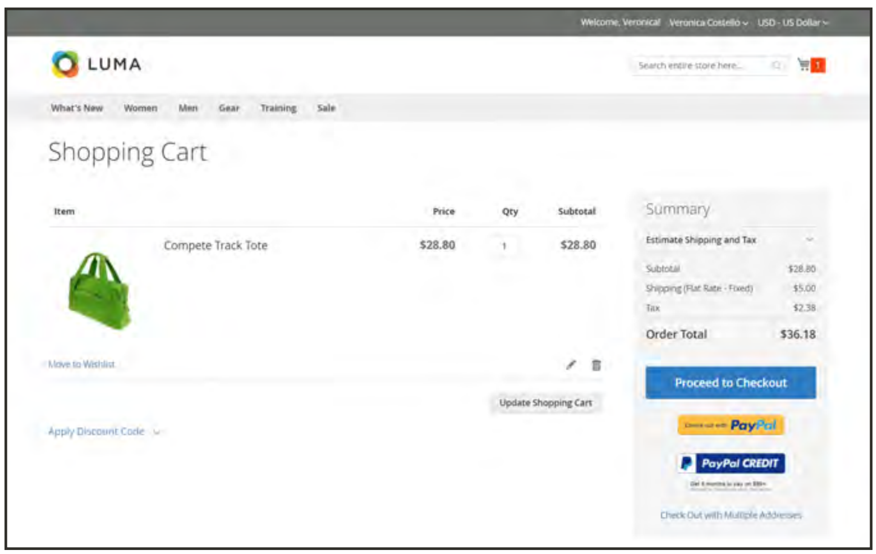
5. When complete, tap **Save Config**.

CHAPTER 60:

Shopping Assistance

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. You can offer immediate assistance both guests and customers who have registered for an account with your store.

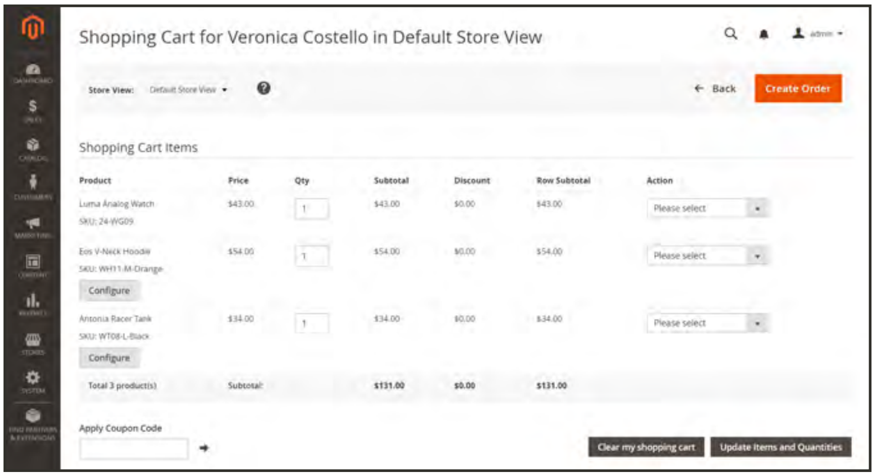
- Creating Customer Accounts
- Creating Orders



Shopping Cart

Managing a Shopping Cart

To begin an assisted shopping session, the customer must be logged into their account from the storefront to make the information available. If the customer doesn't have an account, you can create one.



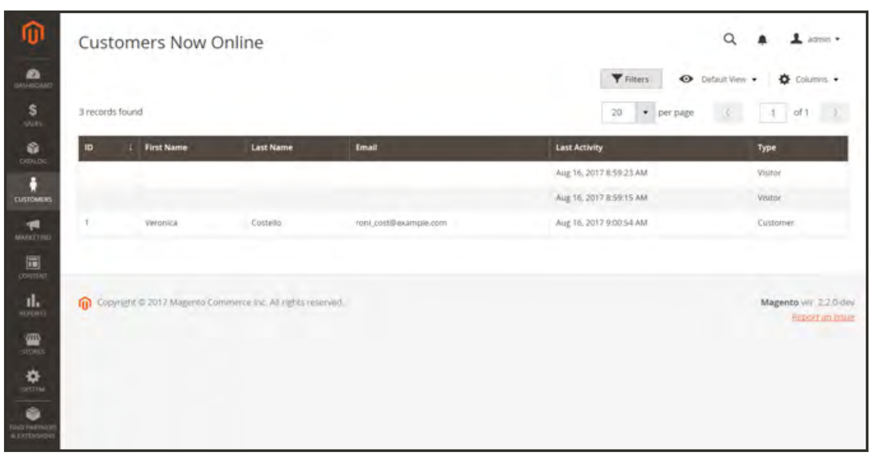
Shopping Cart in Customer Account

To verify that the customer is logged in:

1. In the Admin sidebar, tap **Customers**.

2. Choose **Now Online**.

   All visitors to the store and logged in customers appear in the list.



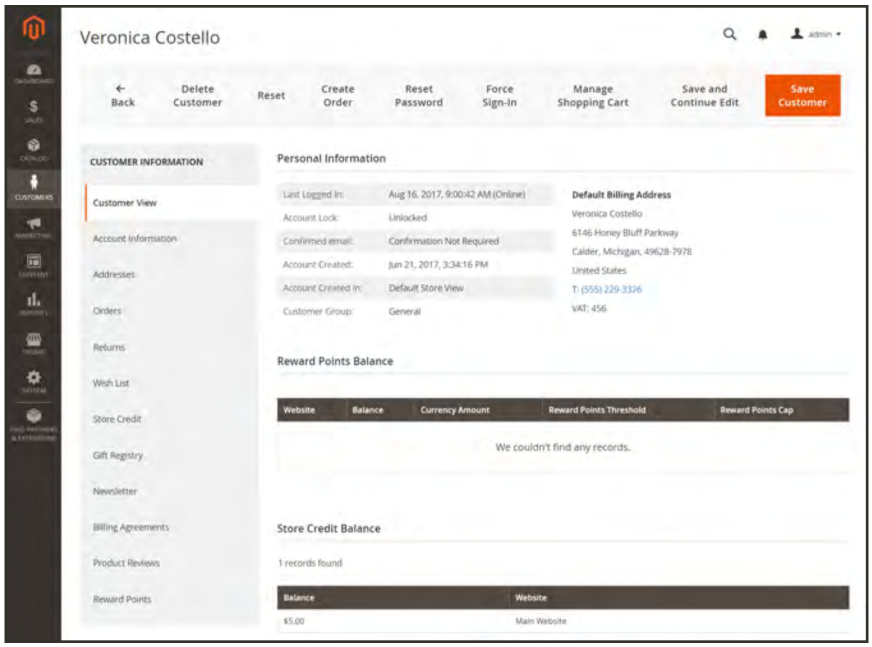
Customers Now Online

To offer assisted shopping:

1. In the Admin sidebar, tap **Customers**. Then, choose **All Customers**.

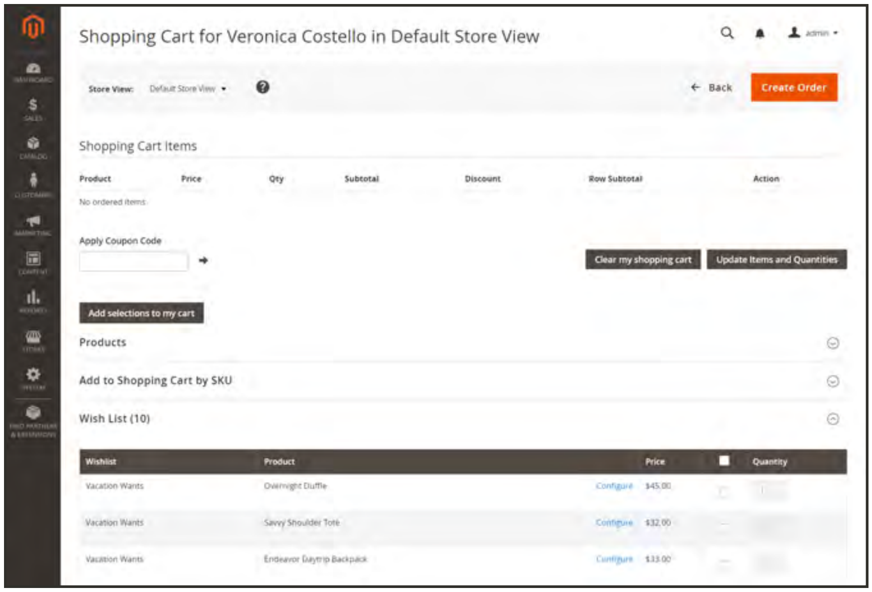
2. In the list, open the customer record in edit mode. To find the customer record in a hurry, use the Filters control.

   In the customer profile under Personal Information, the Last Logged In date and time shows that the customer is currently online.



Customer Profile of Online Customer

3. In the button bar across the top of the page, tap **Manage Shopping Cart** to enter assisted shopping mode.



Assisted Shopping Mode

4. Use any of the following methods to add products to the cart.

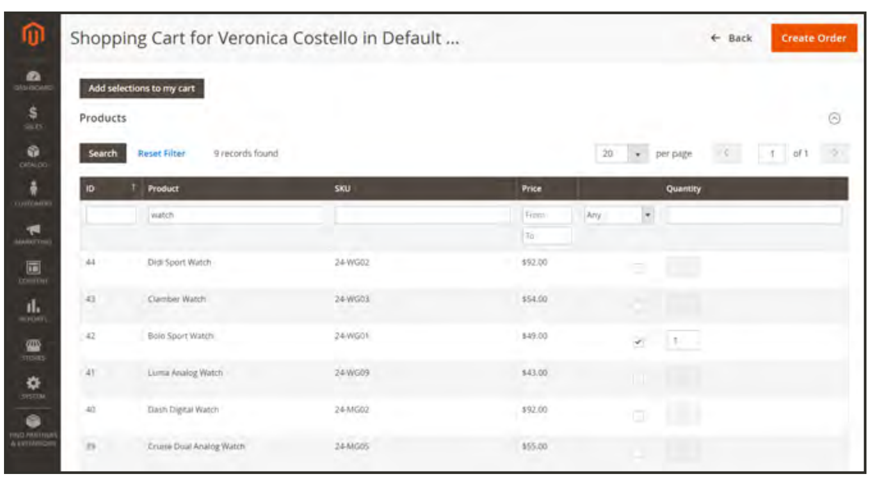
Method 1: Add Products to Cart

1. Expand the **Products** section.
2. To find a product, use any of the filters at the top of each column. Then, tap **Search**.

Add a Simple Product

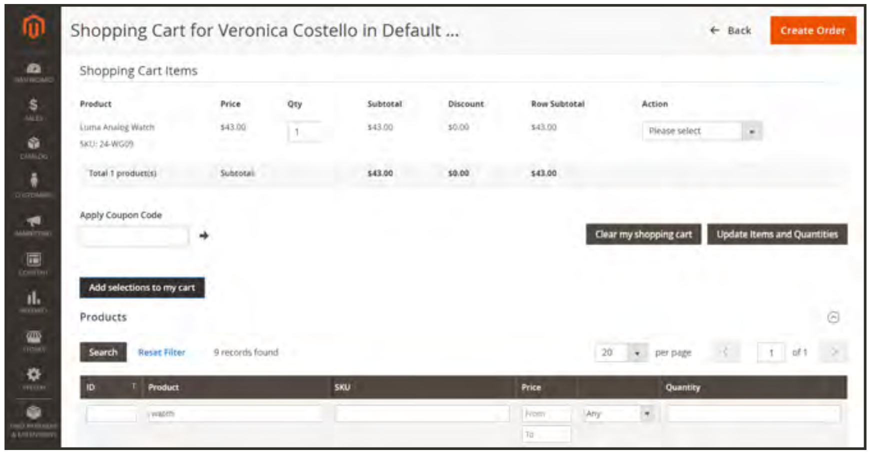
a. Click the product that you want to order. The record is selected, and the default **Quantity** of 1 is entered. If necessary, update the quanity ordered.

b. On the left above the grid, tap **Add selections to my cart**.



Add Product to Cart

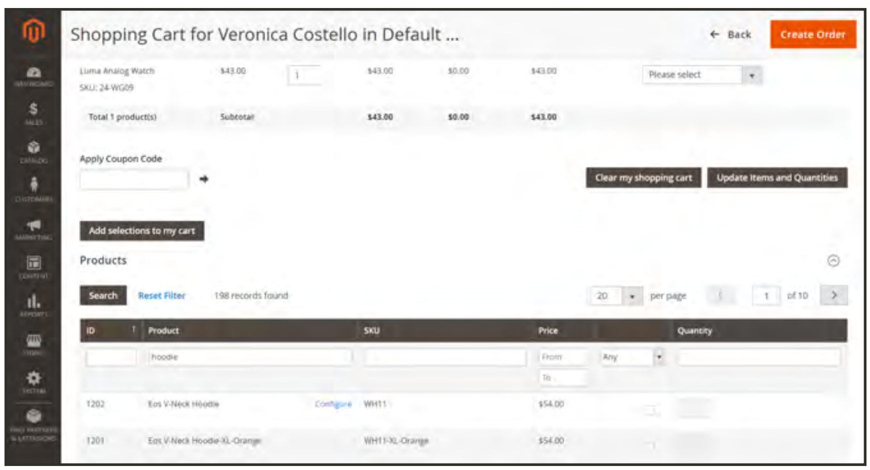
The line item is added to the Shopping Cart at the top of the page.



Cart Updated

Add a Configurable Product

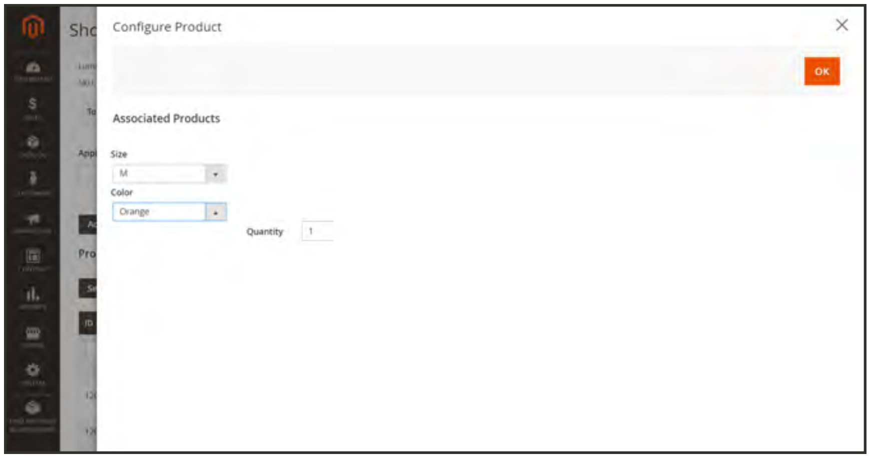
1. In the grid, click **Configure**.



Configure

2. Under **Associated Products**, choose each product option to describe the item to be ordered. Then, enter the **Quantity**.

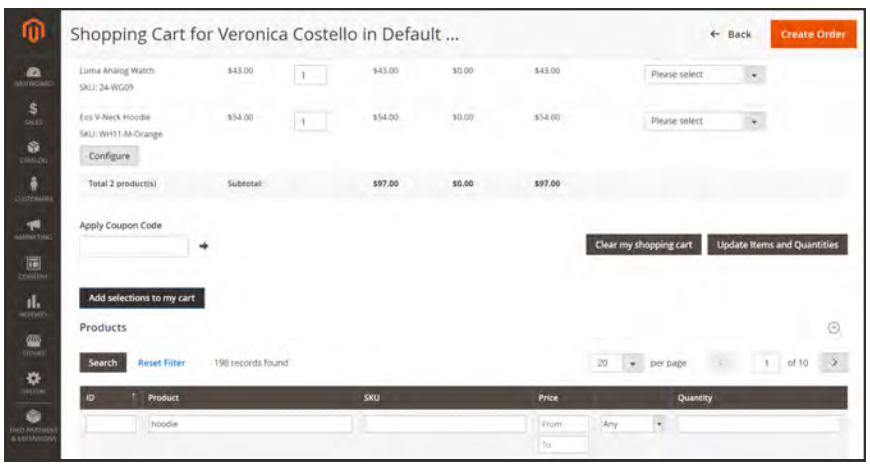
3. Click **OK**.



Choose Options

The product is selected with a checkmark, and the quantity ordered appears in the grid.

4. To add the product to the cart, tap **Add selections to my cart**.



Configurable Product in Cart

5. If you need to update the options after the product has been added to the cart, tap **Configure**. Then, update the options and tap **OK**.

Method 2: Add Item by SKU

1. Expand the **Add to Shopping Cart by SKU** section. Then, use of the following methods to add products to your cart.

Add Items Individually

a. Enter the **SKU** and **Qty** of the item to be ordered.

b. To order another product, tap **Add another**.

Add Products by SKU

c. Tap **Add selections to my cart**.

d. If the item is a configurable product, choose the product options when prompted. Then, tap **Add to Shopping Cart**.

Add Products by SKU

Upload CSV File

1. Before you begin, prepare a csv file with the items to be added to the cart. The file must contain only two columns, with “sku” and “qty” in the header.

1. Tap **Choose File**.

2. Select the file to be uploaded from your directory.

Method 3: Transfer an Item

Items can be transferred to the cart from the customer’s wish list, recently viewed, compared, or ordered items. The number of items in each section appears in parentheses after the section header.

1. Expand one of the following sections.
   - Wish List
   - Products in the Comparison List
   - Recently Compared Products
   - Recently Viewed Products
   - Last Ordered Items
2. In the grid, select each product to be ordered. and enter the **Quantity**.
3. To enter the options for a configurable product, tap **Configure**. Then, follow the instructions in Method 1 to choose each product option.
4. When complete, tap **Add selections to my cart**.

5. To apply a coupon code, do the following:

   a. In the **Apply Coupon Code** field, enter a valid coupon code.

   b. Click the **Apply** (➔) arrow.

6. To adjust the quantity ordered:

   a. In the **Qty** column of the product to be adjusted, enter the correct amount.

   b. Click **Update Items and Quantities**.

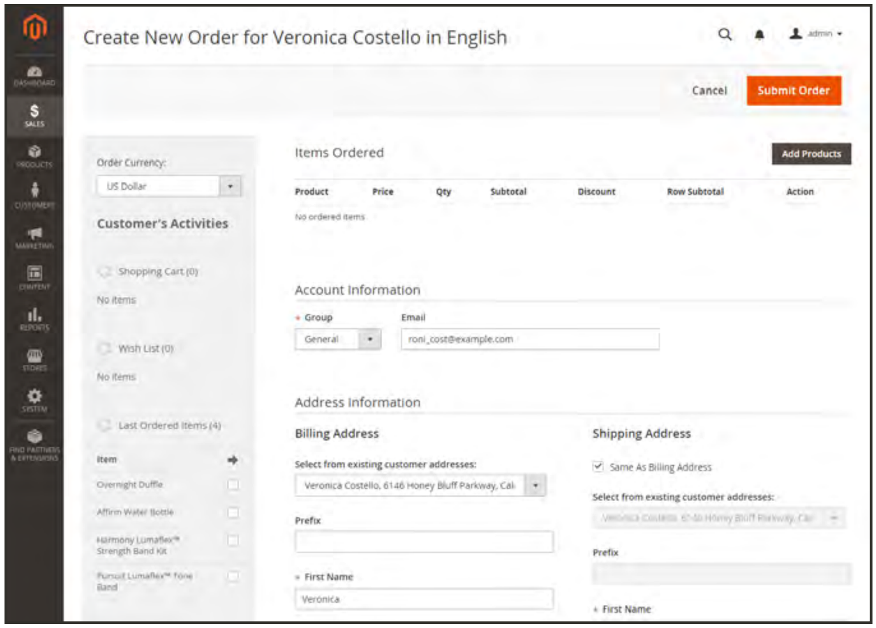
7. When ready to place the order, tap **Create Order**.

   The Create New Order page shows the items in the cart, followed by the shipping and payment information.

8. Complete the shipping and payment information, and tap **Submit Order**. To learn more, see: Creating an Order.

Creating an Order

For registered customers who need assistance, you can create an entire order directly from the Admin. The Create New Order form includes all the information that is needed to complete the normal checkout process, with activity summaries from the customer's account dashboard.



Create New Order

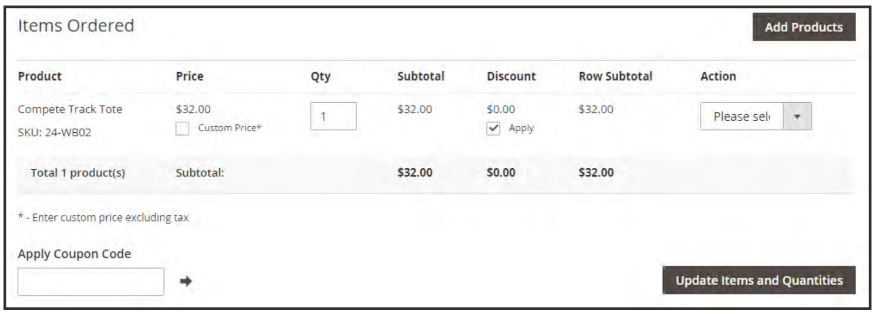
To create a new order:

1. On the Admin sidebar, tap **Customers**.
2. Find the customer in the grid. Then in the **Action** column, click **Edit**.
3. In the workspace header, tap **Create Order**.

4. If your store has multiple views, choose the store view where the order is to be placed. .
5. To add products from the **Customer's Activities**, mark the checkbox of each product in the panel on the left. Then, scroll down and tap **Update Changes** . The item appears in the order form.

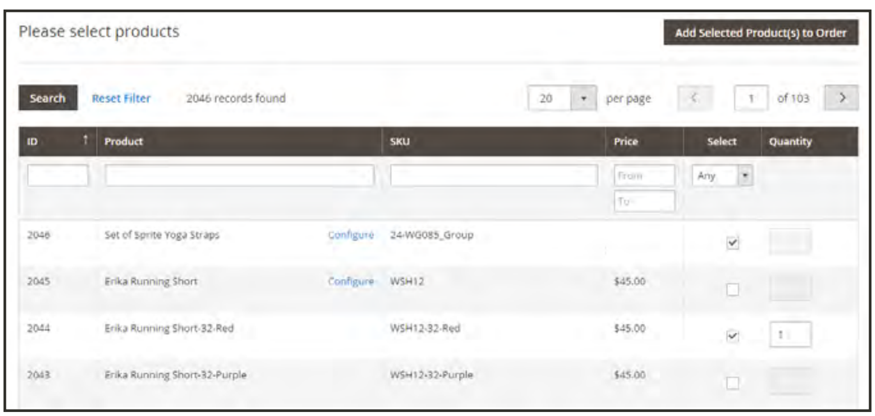
Add to Cart

6. To add products from the catalog, tap **Add Products**. Then, do the following:



Add Products

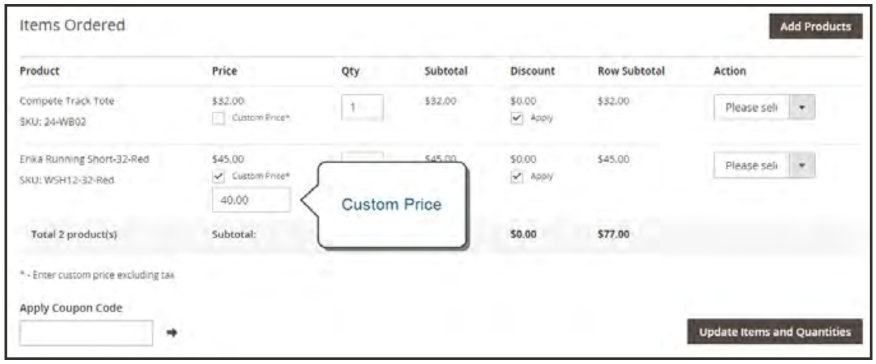
a. In the grid, mark the checkbox of each product to be added to the cart, and enter the **Qty** to be purchased.



Select Products

b. If the product has multiple options, tap **Configure**. Complete the options as needed, and tap **OK**. Then, click the **Add Selected Product(s) to Order** link to update the cart.

c. To override the price of an item, mark the **Custom Price** checkbox. Then, enter the new price in the box below. To update the cart totals, tap **Update Items and Quantities**.

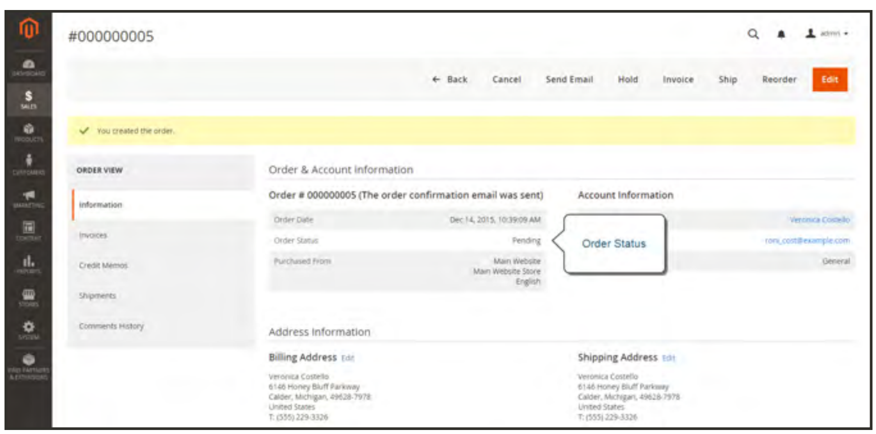


Custom Price

d. Complete the following sections as needed for the order:

- Apply Coupon Codes
- Payment Method
- Shipping Method
- Order Comments

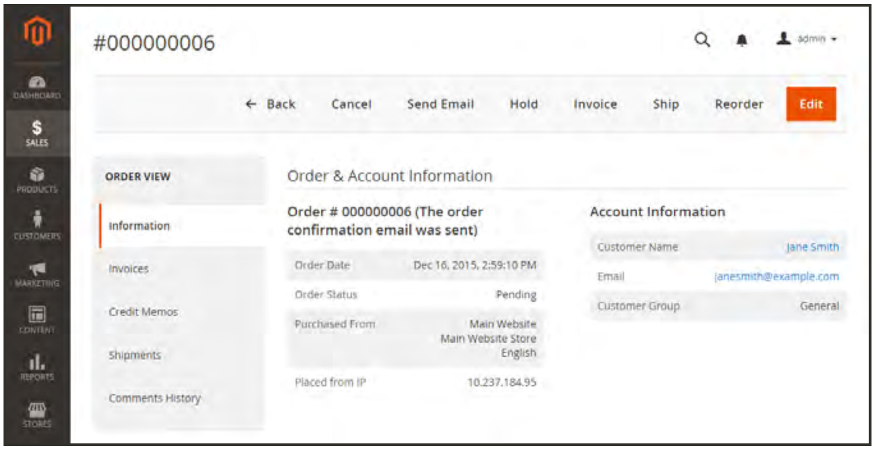
7. When complete, tap **Submit Order**. A confirmation is sent to the customer, and the customer can view the order details from their account.



Order Created

Updating an Order

After a customer places an order, it is sometimes necessary to edit the order, place it on hold, or cancel it entirely. When you change an order, the original order is canceled and a new order is generated. You can, however, change the billing or shipping address without generating a new order.



Edit Order

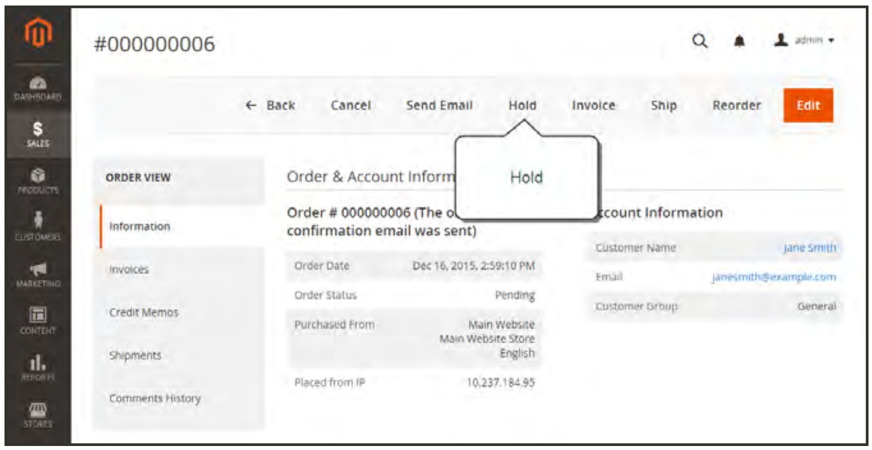
To edit an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order to be edited. Then in the **Action** column, click the **View** link.
3. Tap **Edit**. When prompted to confirm, tap **OK** to continue.
4. Make the necessary changes to the order.
5. When complete, do one of the following:
   - To save changes made to the billing or shipping address, tap **Save**.
   - To save changes made to line items, and reprocess the order, tap **Submit Order**.

To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

1. In the Orders grid, find the pending order that you want to place on hold.
2. In the *Action* column, click the **View** link.
3. Tap **Hold** to place the order on hold.



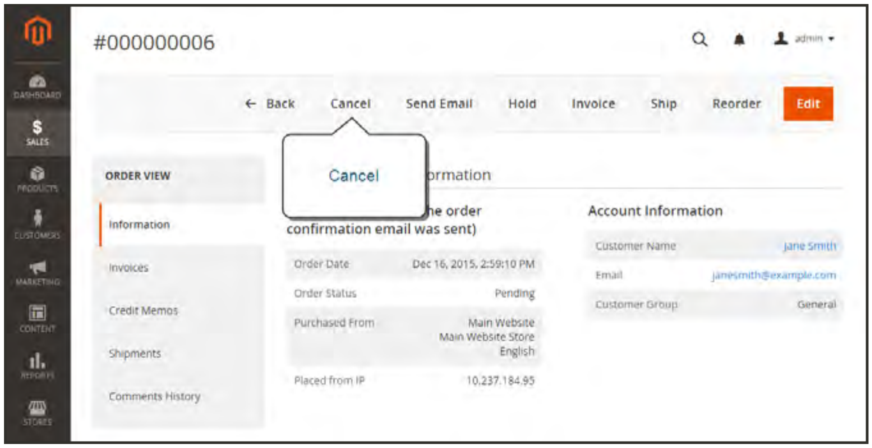
Hold Order

4. When you are ready to return the order to an active state, repeat the process and tap **Unhold**.

To cancel an order:

Canceling an order changes its status from "Pending" to "Canceled."

1. In the Orders grid, find the pending order to be canceled.
2. In the **Action** column, click the **View** link.
3. Tap **Cancel**.



Cancel Order

The status of the order is now “Canceled.”

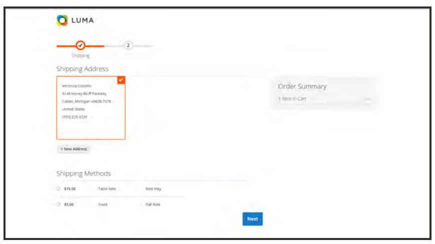
CHAPTER 61:

Checkout

When the checkout process begins, the transaction shifts to a secure, encrypted channel. A padlock symbol appears in the address bar of the browser, and the URL changes from “http” to “https”.

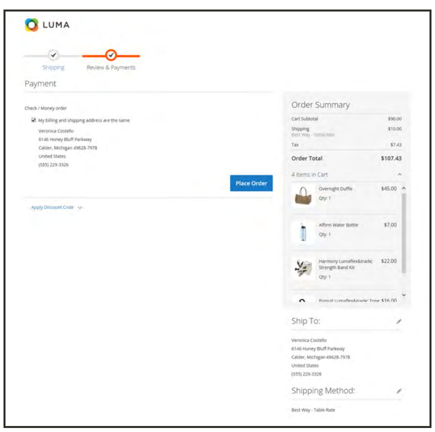
From this point on, the goal is to gather the information necessary to complete the transaction. The Checkout page leads the customer through each step of the process. Customers who are logged into their accounts can complete checkout quickly, because much of the information is already in their accounts.

Checkout Steps



Step 1: Shipping

The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method.



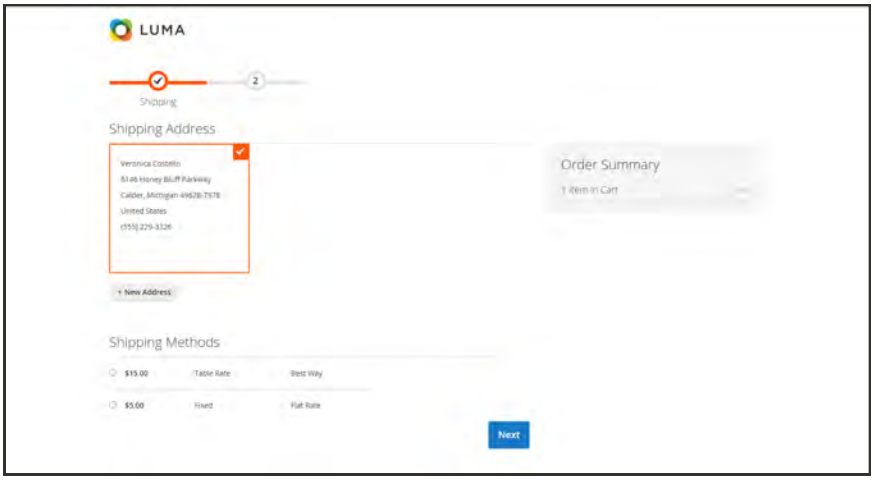
Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase.

The order confirmation appears after the order is placed. For registered customers, the page includes the order number with a link to the customer’s account, and a link to generate a receipt.

Checkout Step 1: Shipping

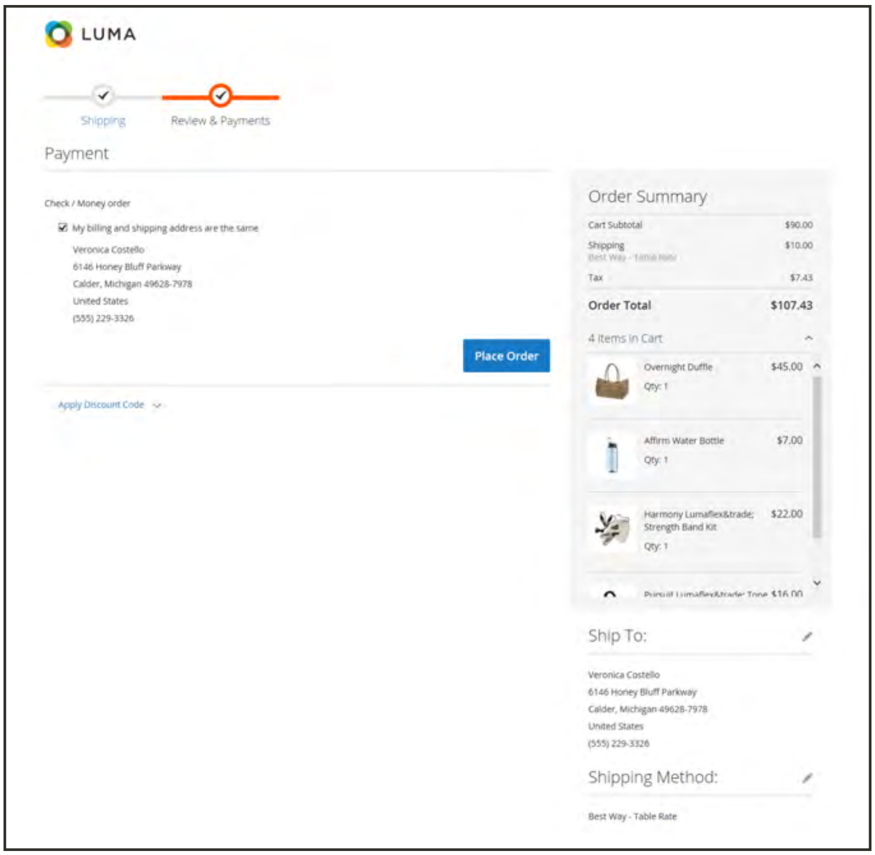
The first step of the checkout process is for the customer to complete the shipping address information, and to choose the shipping method. If the customer has an account, the shipping address is entered automatically, but can be changed if needed. The progress bar at the top of the page follows each step of the checkout process, and the Order Summary shows the information entered so far.



Checkout Step 1: Shipping

Checkout Step 2: Review & Payments

During the second step of the checkout process, the customer chooses the payment method, and applies any coupons with promotional codes to the purchase. All information can be reviewed, and edited if needed. If enabled, the customer must to agree to the terms and conditions of the sale before placing the order.

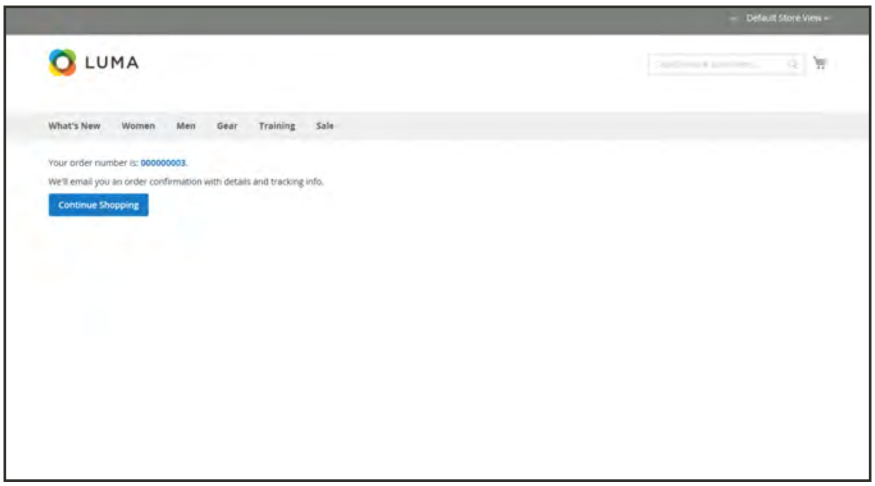


Review & Payments

Order Confirmation

The order confirmation appears after the order is placed. For registered customers, the page includes the order number with a link to the customer's account, and a link to generate a receipt. Registered customers are told that they will receive order confirmation and tracking info by email. Guests are encouraged to create an account to track the order. Registered customers can generate a receipt by clicking a link.

The order confirmation page is also called the "Success" page, and is used by analytics programs to track conversions.



Order Confirmation

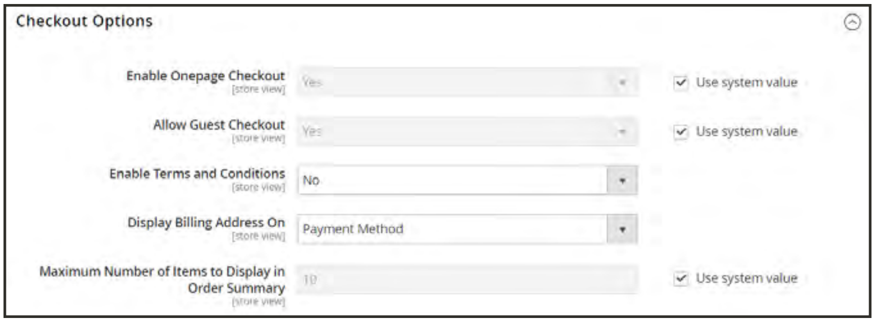
Checkout Configuration

The checkout configuration determines the format of the page, the requirements to make a purchase, and the options that are presented during the checkout process.

- Guest Checkout
- Terms and Conditions
- One Page Checkout
- Gift Options
- Checkout Totals Sort Order

Checkout Options

The checkout configuration determines the layout of the checkout page, and if shoppers must register for an account and agree to the terms and conditions of the sale before making a purchase.



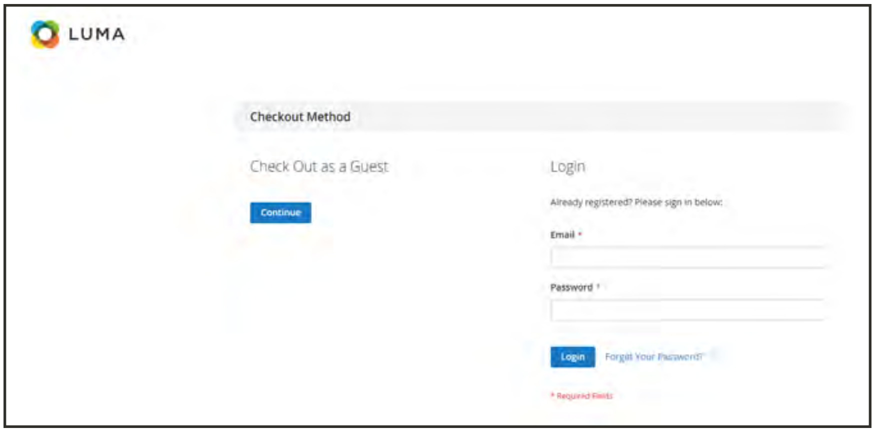
Checkout Options

To change the checkout options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Checkout Options** section.
4. Set the following to your preference:
   - Enable Onepage Checkout
   - Allow Guest Checkout
   - Enable Terms and Conditions
5. When complete, tap **Save Config**.

Guest Checkout

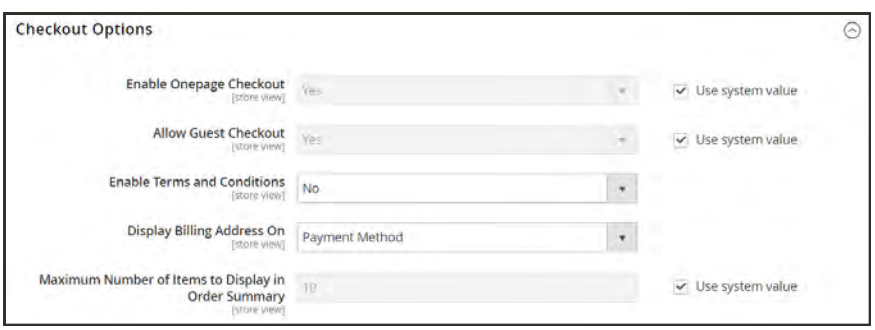
Your store can be configured to require shoppers to open an account before making a purchase. The default setting allows guests to make purchases, with an option to register for an account after they complete the checkout process.



Checkout as Guest

To change the guest checkout setting:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Checkout Options** section.
4. If necessary, clear the **Use system value** checkbox. Then, do the following:
   a. If applicable, choose the store view where the configuration applies.
   b. When prompted, tap **OK** to continue.
5. Set **Allow Guest Checkout** to your preference:

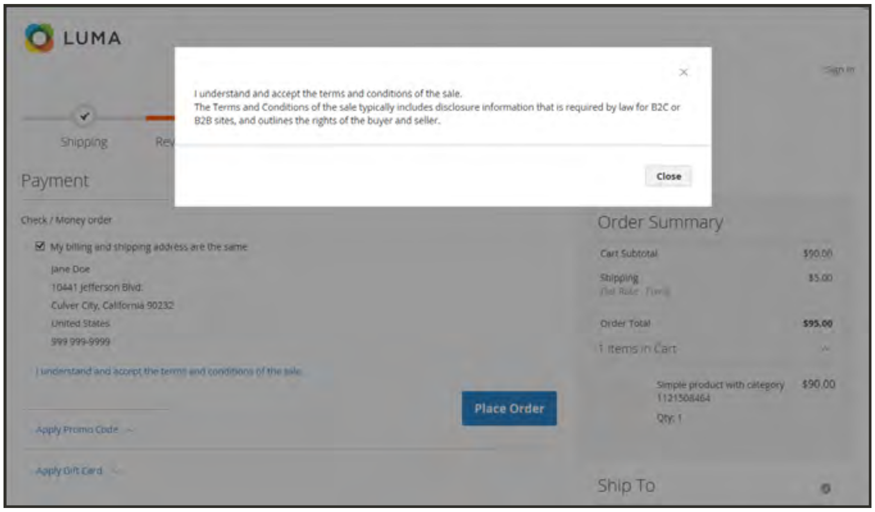


Checkout Options

6. When complete, tap **Save Config**.

Terms and Conditions

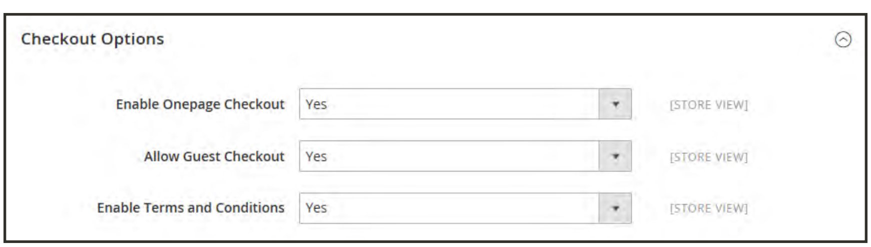
When Terms and Conditions is enabled, customers are required to agree to the terms and conditions of the sale before the purchase is finalized. The Terms and Conditions of the sale typically includes disclosure information that might be required by law for B2C or B2B sites, and outlines the rights of the buyer and seller. The Terms and Conditions message appears after the payment information, just before the Place Order button.



Terms and Conditions at Checkout

Step 1: Enable Terms and Conditions

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Checkout**.
3. Expand the **Checkout Options** section. Then, do the following:
   a. Verify that **Enable Onepage Checkout** is set to "Yes."
   b. Set **Enable Terms and Conditions** to "Yes."



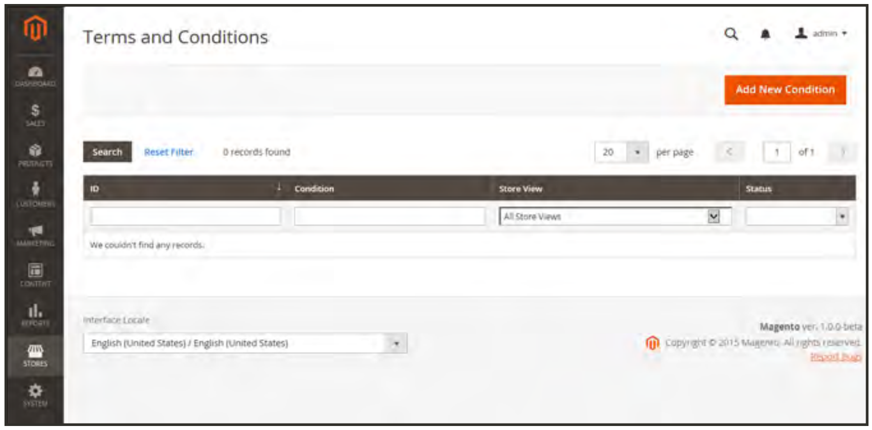
Checkout Options

4. When complete, tap **Save Config**.

Step 2: Add Your Terms and Conditions

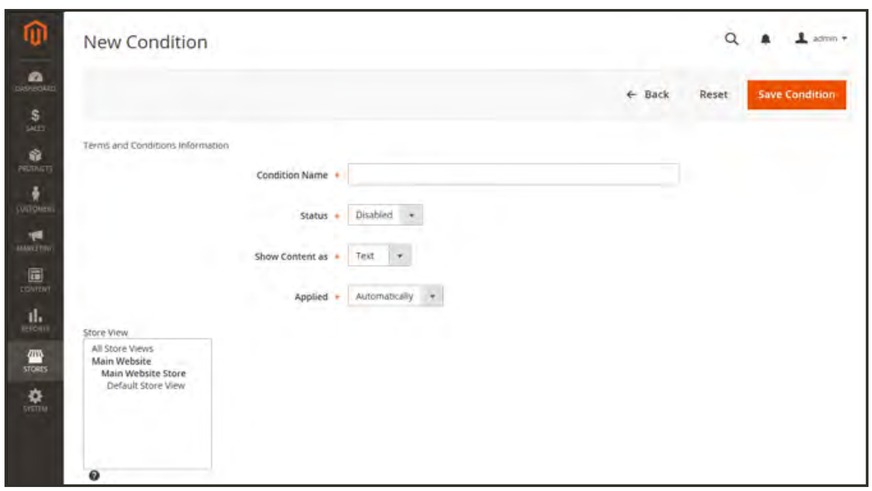
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Terms and Conditions**.

2. In the upper-right corner, tap **Add New Condition**.



Terms and Conditions Information

3. In the Terms and Conditions Information section, complete the following:



New Condition

   a. Enter the **Condition Name** for internal reference.

   b. Set **Status** to "Enabled."

c. Set **Show Content as** to one of the following:

Text	Displays the terms and conditions content as unformatted text.
HTML	Displays the content as HTML which can be formatted..

4. Select each **Store View** where the Terms and Conditions is to be used.
5. Enter the **Checkbox Text** to be used as the text for the Terms and Conditions link. For example, “I understand and accept the terms and conditions of the sale.
6. In the **Content** box, enter the full text of the terms and conditions of the sale.
7. (Optional) Enter the **Content Height (css)** in pixels, to determine the height of the text box where the terms and conditions statement appears during checkout. For example, to make the text box one inch high on a 96 dpi display, enter 96. A scroll bar appears if the content extends beyond the height of the box.
8. When complete, tap **Save Condition**.

One Page Checkout

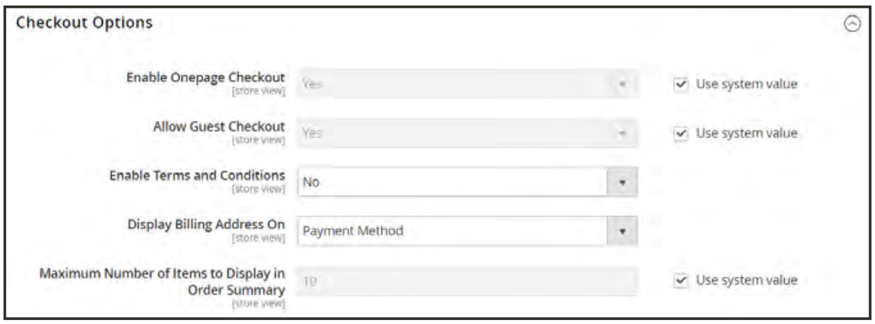
The purpose of OnePage Checkout is to gather the information that is needed, and complete the sale as quickly as possible. When Onepage Checkout is enabled, the entire checkout process takes place on a single page. Each section of the checkout information is expanded as needed.

Magento's Onepage Checkout is enabled by default. If you are implementing a custom integration or checkout extension, it might be necessary to disable Onepage Checkout.

To disable Onepage Checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Sales**, choose **Checkout**.



Checkout Options

3. Expand the **Checkout Options** section.

4. If necessary, clear the **Use system value** checkbox. Then, do the following:

   a. If the setting is for a specific store view, choose the store view where the configuration applies.

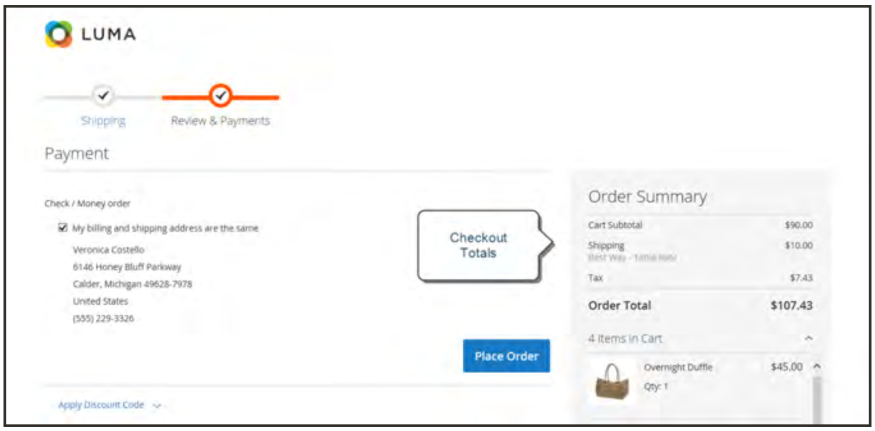
   b. When prompted, tap **OK** to continue.

5. Set **Enable Onepage Checkout** to "No."

6. When complete, tap **Save Config**.

Checkout Totals Sort Order

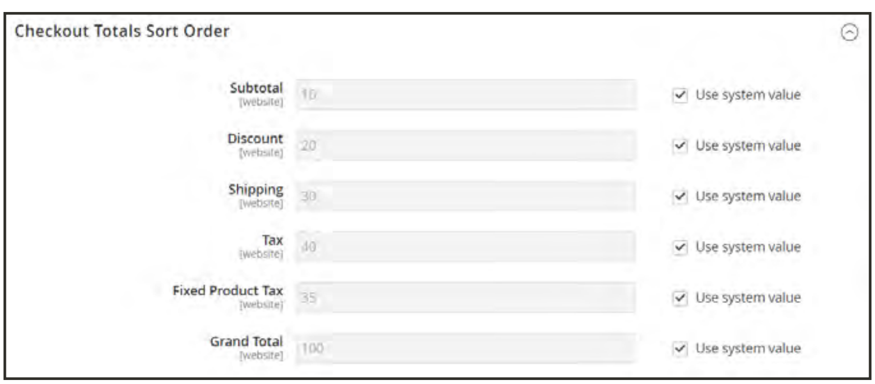
During Order Review, the total appears at the bottom of the order, with any adjustments for discounts, shipping charges, store credit, and tax. The order of each item determines the sequence of the calculations, and is set in the configuration by a number that is assigned to each item. For example, the Subtotal is the first item in the section, and is assigned a value of 10. The Grand Total appears last, and is assigned a value of 100. All of the other items in the totals section are assigned a value between those values.



Checkout Totals

To configure the checkout totals:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand the **Checkout Totals Sort Order** section.



Checkout Totals Sort Order

4. If necessary, clear the **Use system value** checkbox. Then, do the following:

   a. If the setting is for a specific store view, choose the store view where the configuration applies.

   b. When prompted, tap **OK** to continue.

5. Change the number assigned to each item to determine its order in the Totals section..

6. When complete, tap **Save Config**.

Order Management

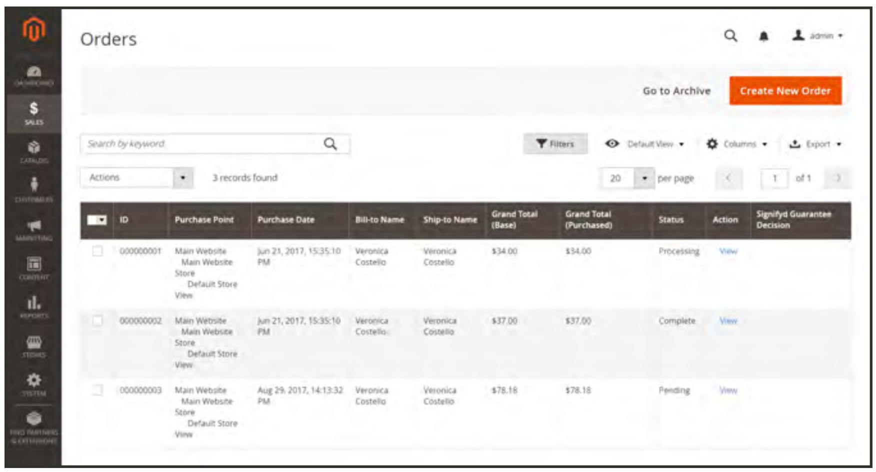
Contents

In this section of the guide, you will learn about each stage of the order workflow, and how to process orders, create invoices, and shipments. You will also learn how to issue credit memos and manage returns.

CHAPTER 62:

Orders

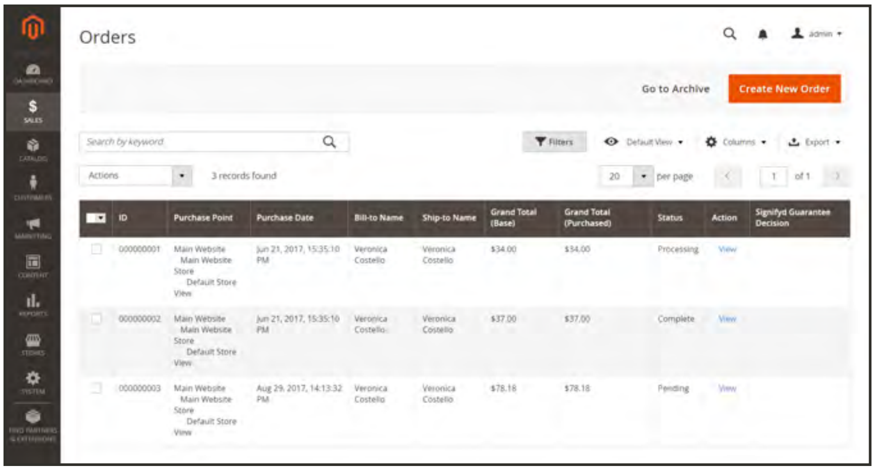
The Orders workspace lists all current orders. Each row in the grid represents an order, and each column represents an attribute, or data field. Use the standard controls to sort and filter the list, find orders, and apply actions to selected orders. You can view existing orders, and create new orders. The tabs above the pagination controls can be used to filter the list, change the default view, change and rearrange columns, and export data.



Orders

Order Workspace

The Order workspace lists all current orders. Each row in the grid represents a customer order, and each column represents an attribute, or data field . Use the standard controls to sort and filter the list, find orders, and apply actions to selected orders. From the grid, you can view existing orders, and create new orders. The tabs above the pagination controls are used to filter the list, change the default view, change and rearrange columns, and export data.



Orders

Workspace Controls

CONTROL	DESCRIPTION
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.
Filters	Defines a set of search parameters that determines the records that appear in the grid.
Default View	Determines the default column layout of the grid.
Columns	Determines the selection of columns and their order in the grid. The column layout can be changed. and saved as a “view.” By default, only some of the columns are included in the grid.
Export	Exports the selected records as a CSV or Excel XML file.

Column Descriptions

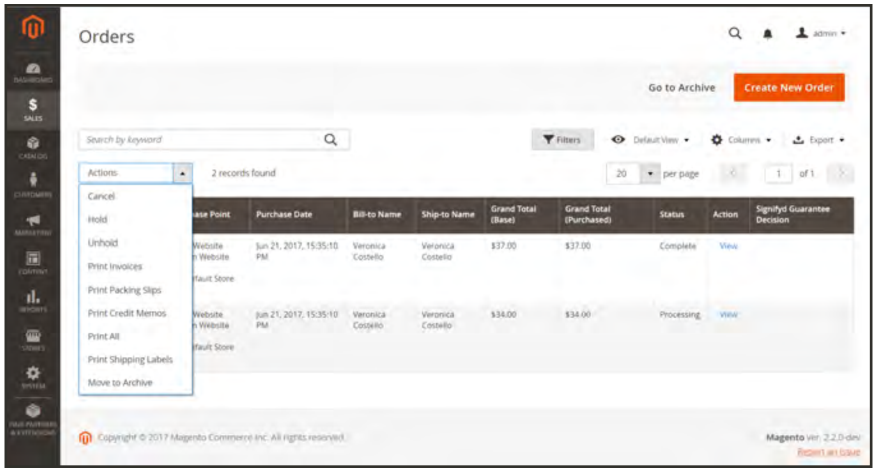
COLUMN	DESCRIPTION
Select	Mark the checkbox to select the quote(s) to be subject to an action, or use the selection control in the column header. Options: Select All / Deselect All
ID	A unique, sequential number that is assigned when a new order is saved for the first time.
Purchase Point	Identifies the store view where the order was placed.
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status.
Action	View — Opens the order in edit mode.
Signifyd Guarantee Decision	If enabled, Signifyd automatically reviews your orders for fraud, and indicates which orders to ship, and which to reject.

Column Descriptions (cont.)

COLUMN	DESCRIPTION
ADDITIONAL COLUMNS AVAILABLE	
Billing Address	The billing address of the customer who placed the order.
Shipping Address	The address where the order is to be shipped.
Shipping Information	The method that is to be used to ship the order.
Customer Email	The email address of the person who placed the order.
Customer Group	The customer group to which the person who placed the order is assigned.
Subtotal	The order subtotal, without shipping and handling, and tax.
Shipping and Handling	The amount charged for shipping and handling.
Customer Name	The first and last name of the customer who placed the order.
Payment Method	The method of payment to be used for the order.
Total Refunded	Any amount from the order that is to be refunded to the customer.
Refunded to Store Credit	Any amount from the order that is to be refunded to the customer’s store credit.

Order Actions

To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.



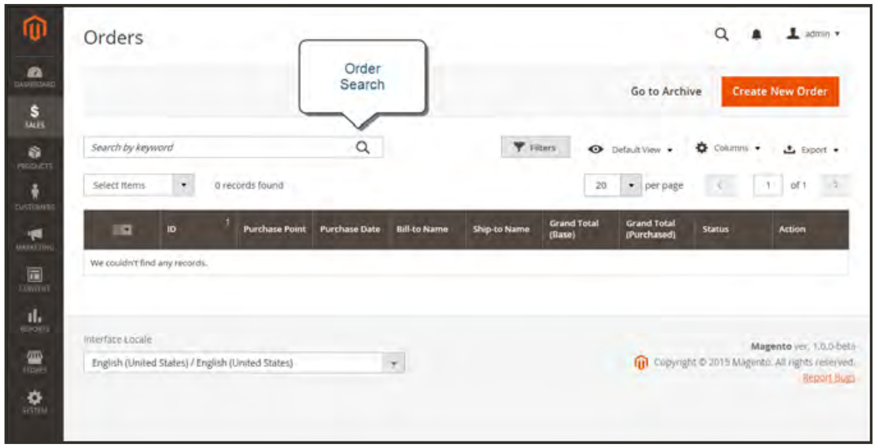
Order Actions

Action Controls

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 / Print Packing Slips Hold / Print Credit Memos Unhold / Print All Print Invoices / Print Shipping Labels 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.

Order Search

The Search box in the upper-left of the Orders grid can be used to find specific orders by keyword, or by filtering the order records in the grid.



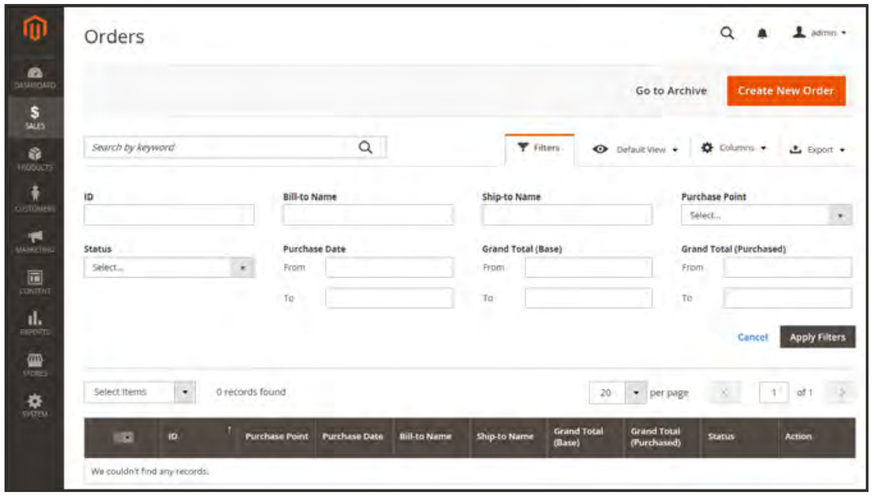
Search Results

To search for a match:

1. Enter a search term into the page search box.
2. Tap **Search** ( ) to display the results.

To filter the search:

1. Tap the **Filters** ( ) tab to display the selection of search filters.
2. Complete as many of the filters as needed to describe the order(s) that you want to find.
3. Tap **Apply Filters** to display the results.



Order Filters

Search Filters

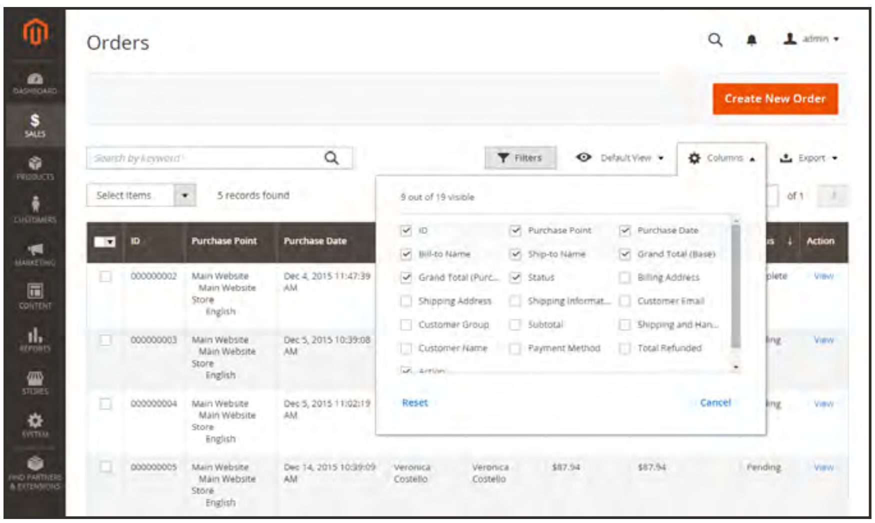
FILTER	DESCRIPTION
ID	Filters the search based on order ID.
Bill-to Name	Filters the search by the name of the person who is responsible to pay for the order.
Ship-to Name	Filters the search by the name of the person to whom each order is shipped .
Purchase Point	Filters the search by website, store, or store view where the order was placed.
Status	Filters the search based on order status. Options: Canceled — Payment Review Closed — PayPal Canceled Reversal Complete — Pending Suspected Fraud — Pending Payment On Hold — 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.

Search Filters (cont.)

FILTER	DESCRIPTION
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 order in the grid can be changed according to your preference. The new layout can be saved as a grid "view." By default, only nine of twenty available columns are included in the grid.



Order Grid Columns

To change the column selection:

In the upper-right corner, tap the **Columns** (⚙) control. Then, do the following:

- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

Make sure to scroll down to see all available columns.

To move a column:

1. Tap the header of the column, and hold.
2. Drag the column to the new position, and release.

To save a grid view:

1. Tap the **View** ( ) control. Then, tap **Save Current View**.
2. Enter a **name** for the view. Then, click the **arrow** ( ) to save all changes.

   The name of the view now appears as the current view.

To change the view:

Tap the **View** ( ) control. Then, do one of the following:

- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit** ( ) icon. Then, update the name.

Order Workflow

When a customer places an order, a sales order is created as a temporary record of the transaction. In the Orders grid, sales orders initially have a status of "Pending," and can be canceled at any time until the payment is processed. After payment is confirmed, the order can be invoiced and shipped.

1. **Place Order**. The checkout process begins when the shopper clicks the Go to Checkout button on the shopping cart page or reorders directly from their customer account.

2. **Order Pending.** In the Orders grid, the status of the sales order is initially “Pending.” Payment has not been processed, and the order can still be edited or canceled.

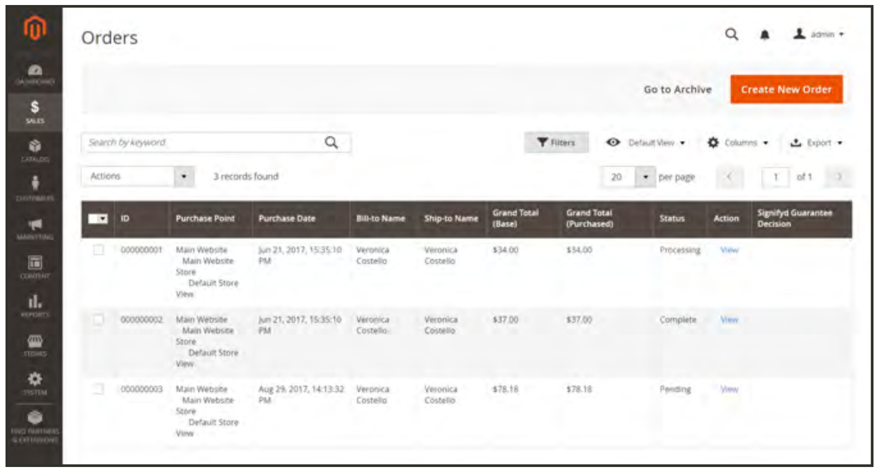
3. **Receive Payment.** The status of the order changes to “Processing.” when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

4. **Invoice Order.** An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.

5. **Ship Order.** The shipment is submitted, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer’s account.

Processing an Order

When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of "Pending" until payment is received. Sales orders can be edited while pending, and can be canceled up until the time that an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices become shipments. The Orders grid lists all orders, regardless of where they are in the workflow.

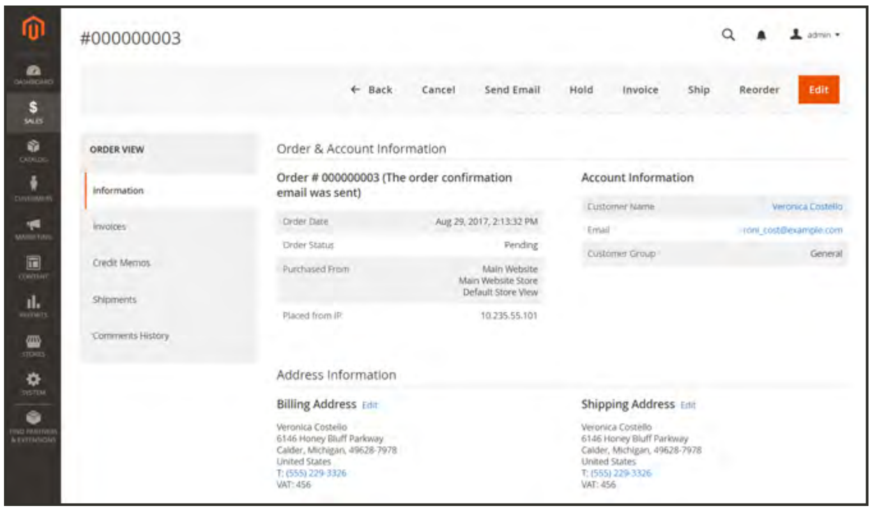


Orders

To view an order:

1. On the Admin sidebar, tap **Sales**. Then choose **Orders**.
2. Find the order in the grid, and in the **Action** column, click **View**.
   - A pending order can be modified, put on hold, canceled, or invoiced and shipped.
   - A completed order can be reordered.

The panel on the left of an open order provides access to different types of information that is related to the order.

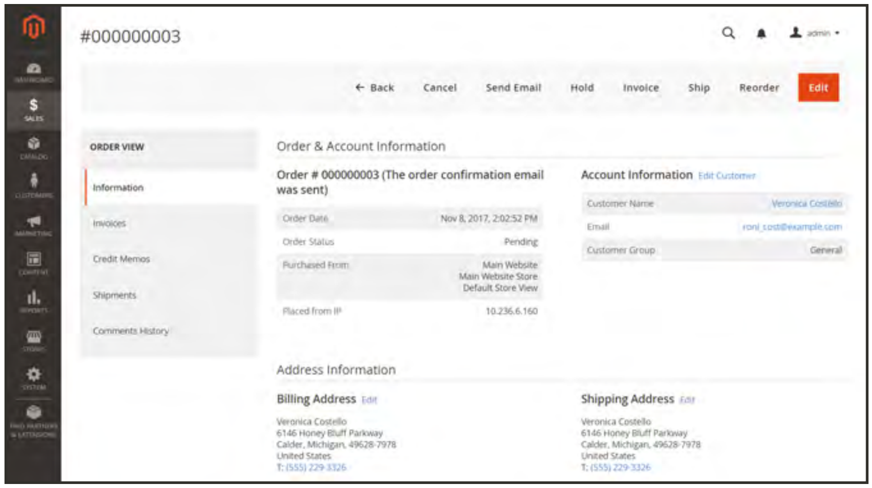


View Order

To process an order:

1. To open a pending sales order, and tap the **Edit** button in the upper-right corner.

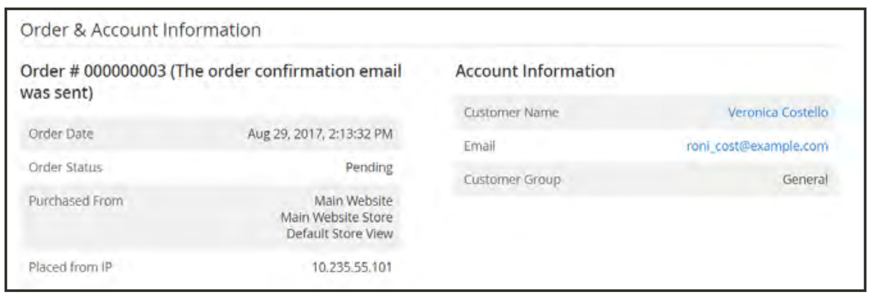
> Orders can be edited only while the status is “Pending”. The Edit button isn’t visible for orders that are “Processing” .



Edit Sales Order

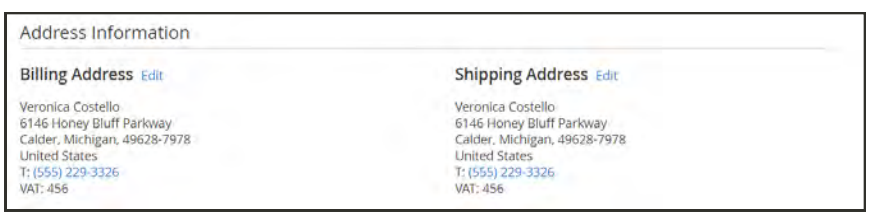
2. Review the following sections in the sales order, using the field descriptions for reference.

Order and Account Information



Order and Account Information

Address Information



Address Information

Payment & Shipping Method

Payment & Shipping Method

Items Ordered

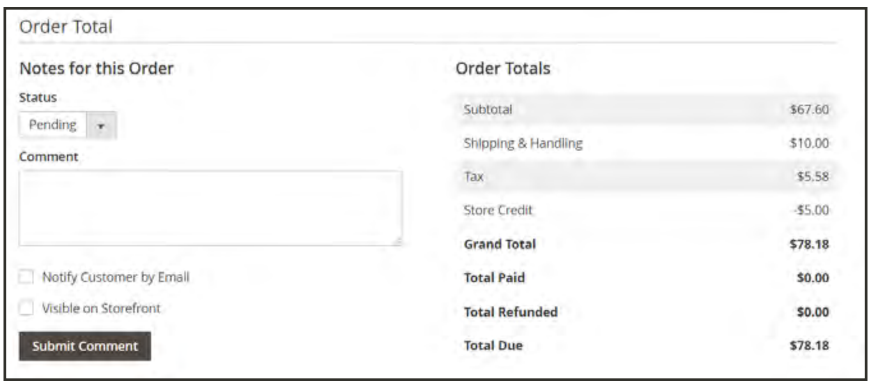
Items Ordered

3. In the **Order Total** section, do the following:

   a. Enter a **Comment** to include with the order.

   b. If you want to email the comment to the customer, mark the **Notify Customer by Email** checkbox.

   c. If you want the comment to be visible in the customer account, mark the **Visible on Storefront** checkbox.



Order Total

4. If you are ready to invoice the order, tap **Invoice**. Then follow the instructions to Creating an Invoice

Order View Descriptions

TAB	DESCRIPTION
Information	Display detailed information about the order and account, including the billing and shipping addresses, payment and shipping methods, items orders, totals, and notes.
Invoices	Lists each invoice that is associated with the order.
Credit Memos	Lists each credit memo that is associated with the order.

Order View Descriptions (cont.)

TAB	DESCRIPTION
Shipments	Lists each shipment record that is associated with the order.
Comments History	Lists all notes that are related to the order.

Button Bar

BUTTON	DESCRIPTION
Back	Returns to the Orders page without saving changes.
Cancel	Cancels the sales order.
Send Email	Sends an email about the order to the customer.
Hold / Unhold	Changes the status of the sales order to “On Hold”. To release the hold on the sales order, choose “Unhold”.
Invoice	Creates an invoice from the sales order by converting the order to an invoice.
Ship	Creates a shipment record for the order.
Reorder	Creates a new sales order based on the current order.
Edit	Opens a pending order in edit mode. The Edit button isn’t visible for orders with a status of “Processing”.

Field Descriptions

FIELD	DESCRIPTION
ORDER & ACCOUNT INFORMATION	
Order Number	The order number appears at the top of the sales order, and also in the Order & Account Information, followed by a note that indicates if the confirmation email was sent.
Order Date	The date and time the order was placed.
Purchased From	Indicates the website, store, and store view where the order was placed.
Placed from IP	Indicates the IP address of the computer from which the order was placed.
Account Information	

Field Descriptions (cont.)

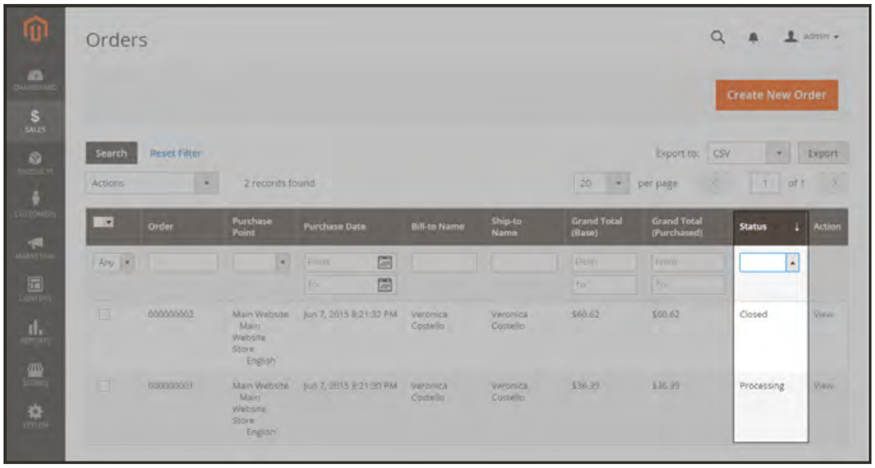
FIELD	DESCRIPTION
Customer Name	The name of the customerwho placed the order. The Customer Name is linked to the customer profile.
Email	The email address of the customer. The email address is linked to open a new email message.
Customer Group	The name of the customer group to which the customer is assigned.
ADDRESS INFORMATION	
Billing Address	The name of the customer who placed the order, followed by the billing address, telephone number and VAT, if applicable. The telephone number is linked to autodial on a mobile device.
Shipping Address	The name of the person to whose attention the order should be shipped, followed by the shipping address and telephone number. The telephone number is linked to autodial on a mobile device.
PAYMENT & SHIPPING METHOD	
Payment Information	The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.
Shipping & Handling Information	The shipping method to be used, and any handling fee that is applicable.
ITEMS ORDERED	
Product	The product name, SKU, and options if applicable.
Item Status	Indicates the status of the item. Values: Ordered
Original Price	The original catalog price of the item before discounts.
Price	The purchase price of the item.
Qty	The quantity ordered.
Subtotal	The subtotal is the purchase price multiplied by the quantity.
Tax Amount	The amount of tax that applies to the item as a decimal value.
Tax Percent	The percentage of tax applied to this item as a percentage.

Field Descriptions (cont.)

FIELD	DESCRIPTION	
Discount Amount	The discount that applies to this item.	
Row Total	The line item total, including applicable taxes that are due at the product level, less discounts.	
ORDER TOTAL		
Notes for this Order		
Status	Indicate the current status of the sales order.	
Comment	A text box that is used to enter a comment to the customer that accompanies the order.	
	Notify Customer by Email	Mark the checkbox if you want to send the comment to the customer as a separate email.
	Visible on Storefront	Mark the checkbox if you want the comment to be visible from the customer's account.
	Submit Comment	Submits the comment, and send by email, if applicable.
Order Totals		
Shipping & Handling	The amount charged for shipping and handling fees.	
Tax	The amount of tax applied to the order, if applicable.	
Store Credit	The amount of available store credit that is applied to the order, if appliable.	
Grand Total	The order total.	
Total Paid	The total amount paid toward the order, if applicable.	
Total Refunded	The total amount refunded from the order, if applicable.	
Total Due	The total amount that is due.	

Order Status

All orders have an order status that is associated with a stage in the order processing workflow. The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the workflow.

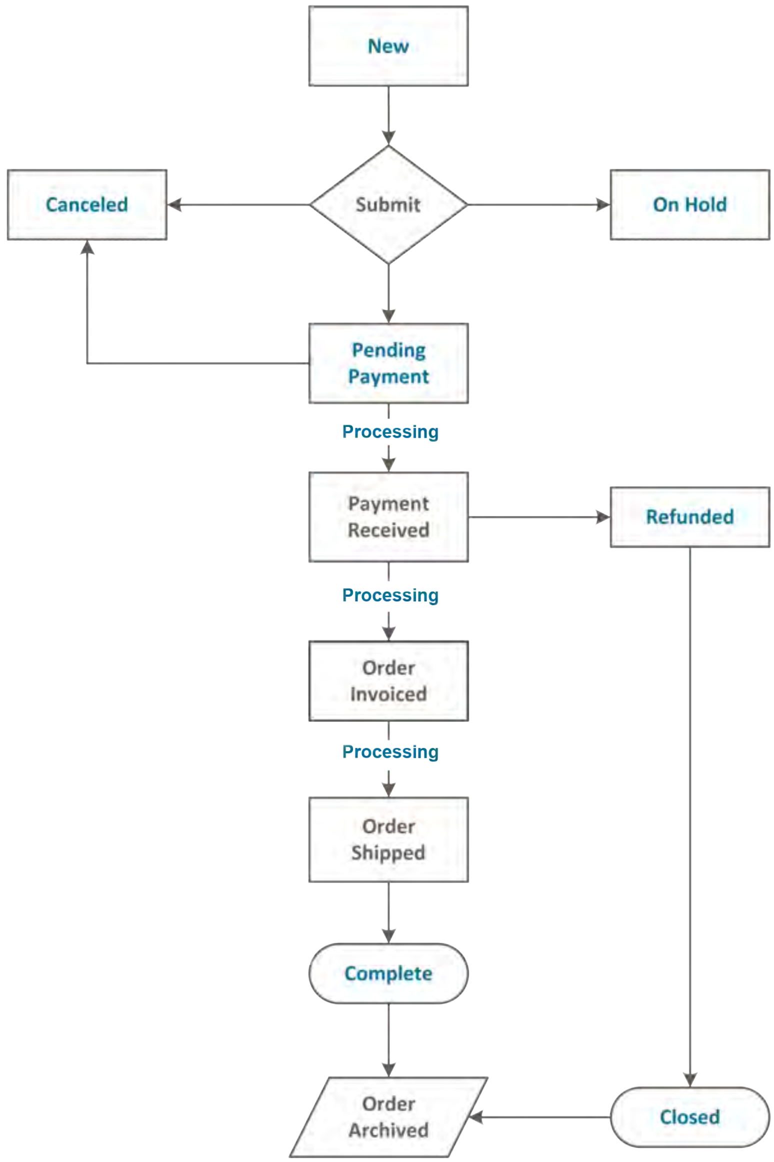


Order Status

Predefined Order Status

ORDER STATUS	STATUS CODE
Processing	processing
Suspected Fraud	fraud
Pending Payment	pending_payment
Payment Review	payment_review
Pending	pending
On Hold	holded
Open	STATE_OPEN
Complete	complete
Closed	closed
Canceled	canceled
PayPal Canceled Reversal	paypay_canceled_reversal
Pending PayPal	pending_paypal
PayPal Reversed	paypal_reversed

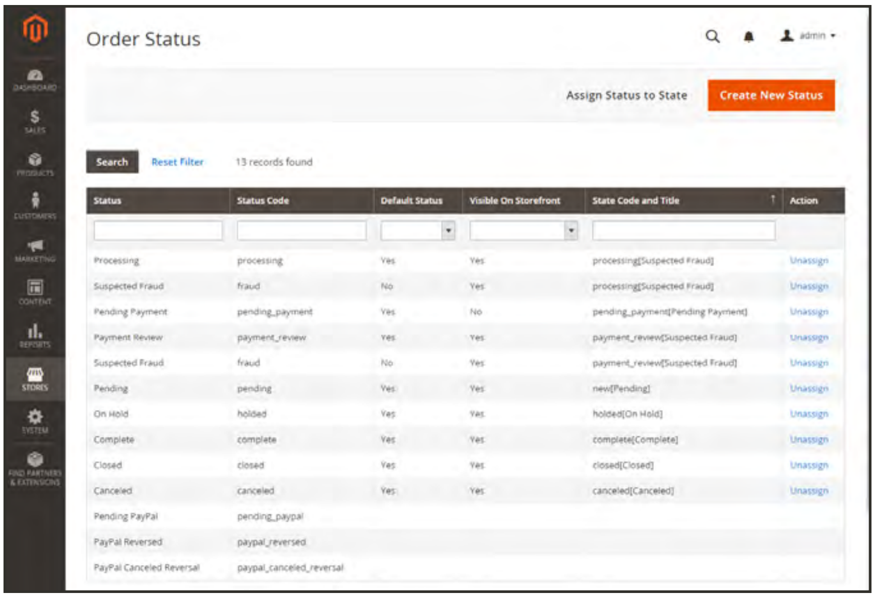
Order Status Workflow



Custom Order Status

In addition to the preset order status settings, you can create custom order status settings of your own, assign them to order states, and set a default order status for order states. For example, you might need a custom order status for orders such as “packaging” or “backordered,” or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

> Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.

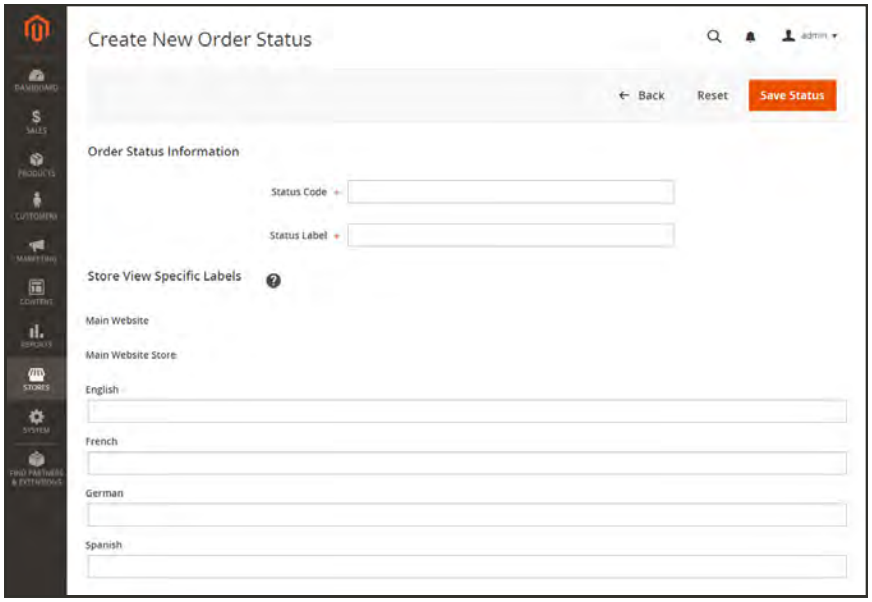


Order Status Settings

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.

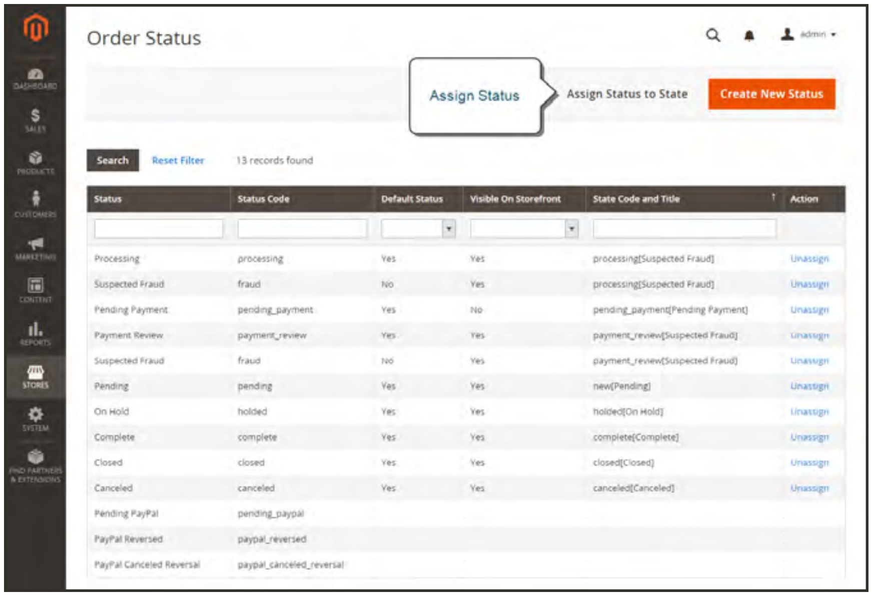
   b. Enter a **Status Label** to identify the status setting in both the Admin and storefront.

4. In the **Store View Specific Labels** section, enter any labels that are needed for different store views.

5. When complete, tap **Save Status**.

To assign an order status to a state:

1. On the Order Status page, tap **Assign Status to State**.



Assign Status

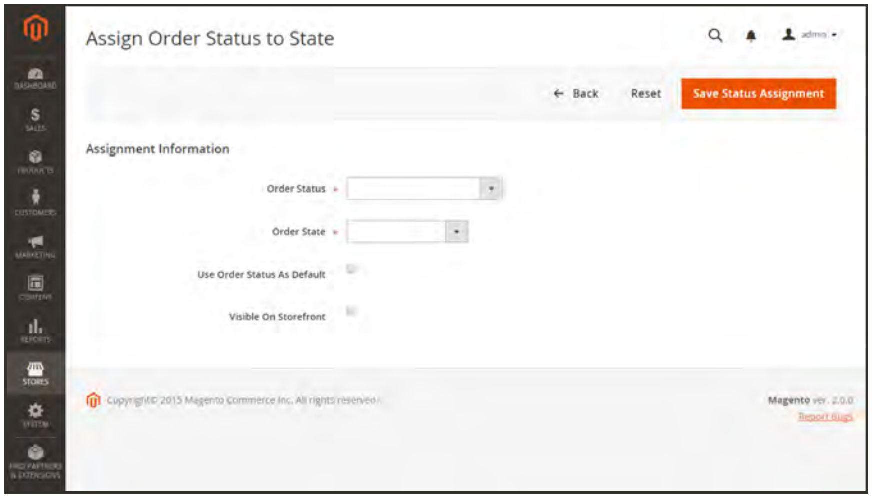
2. In the **Assignment Information** section, do the following:

   a. Choose the **Order Status** that you want to assign. They are listed by status label.

   b. Set **Order State** to the place in the workflow where the order status belongs.

   c. To make this status the default for the order state, mark the **Use Order Status as Default** checkbox.

   d. To make this status visible from the storefront, mark the **Visible On Storefront** checkbox.



Assign Status to State

3. When complete, tap **Save Status Assignment**.

To edit an existing order status:

1. In the Order Status grid, open the status record in edit mode.
2. Update the status settings as needed.
3. When complete, tap **Save Status**.

To remove an order status from an assigned state:

> A status setting cannot be unassigned from a state if the status is currently in use.

1. In the Order Status grid, find the order status record to be unassigned.
2. In the **Action** column on the far right of the row, tap the **Unassign** link.

   A message appears at the top of the workspace that the order status has been unassigned. Although the order status label still appears in the list, it is no longer assigned to a state. Order status settings cannot be deleted.

Order Status and State

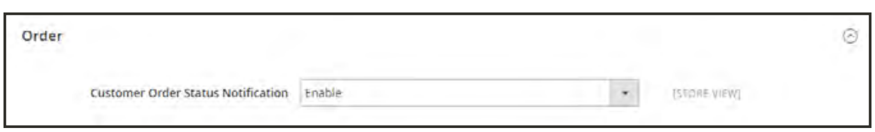
ORDER STATUS	ORDER STATE	
Processing	processing	When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration.

Order Status and State (cont.)

ORDER STATUS	ORDER STATE
Suspected Fraud	fraud
Pending Payment	pending_payment
Payment Review	payment_review
Suspected Fraud	fraud
Pending	pending
On Hold	holded
Complete	complete
Closed	closed
Canceled	canceled
PayPal Canceled Reversal	payment_canceled_ reversal
PayPal Reversed	paypal_reversed
Pending PayPal	pending_paypal

Order Status Notification

Customers can track the status of their orders by RSS feed if the Order RSS feed is enabled in the configuration. When enabled, a link to the RSS feed appears on each order.



Customer Order Status Notification

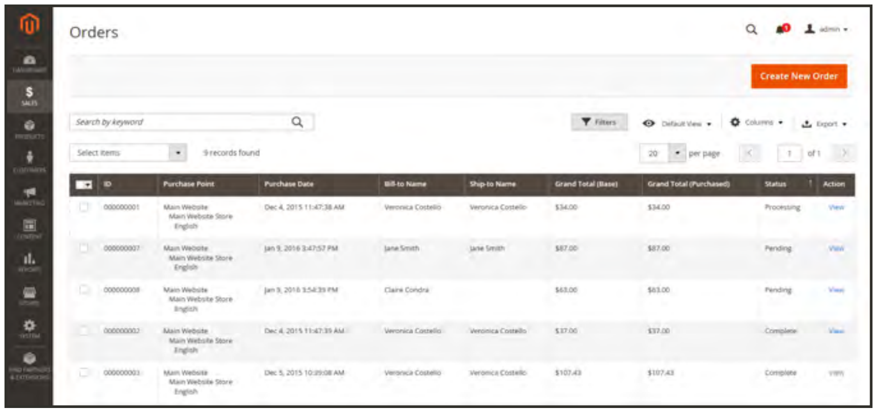
To enable Order Status Notification:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
3. Expand the **Order** section.
4. Set **Customer Order Status Notification** to "Enable".
5. When complete, tap **Save Config**.

Scheduled 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

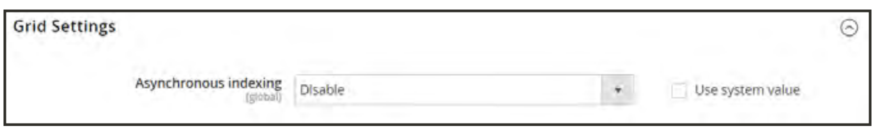
The Grid Settings configuration schedules updates to the following order management grids, and reindexes the data as scheduled by Cron:

- 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.”



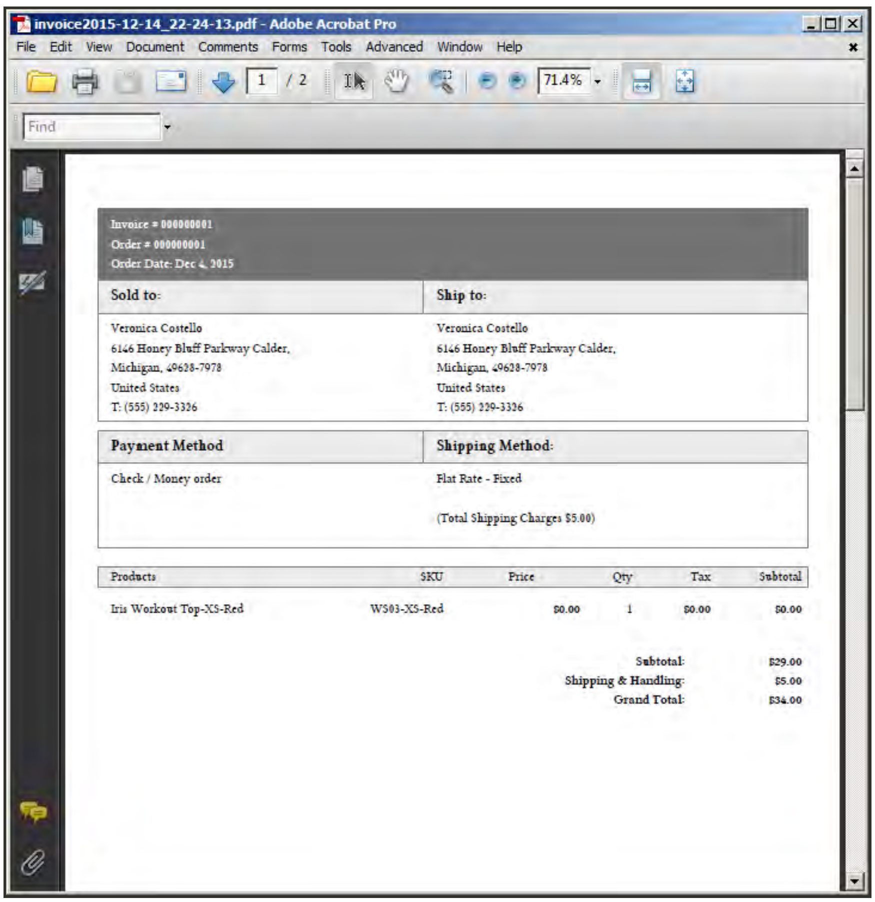
Grid Settings

5. When complete, tap **Save Config**.

CHAPTER 63:

Invoices

An invoice is a record of the record of payment for an order. Multiple invoices can be created for a single order, and each can include as many or as few of the purchased products that you specify. You can upload a high-resolution logo for a print-ready PDF invoice, and include the Order ID in the header. To customize the invoice template with your logo, see: Preparing Your Invoice Logo.



PDF Invoice

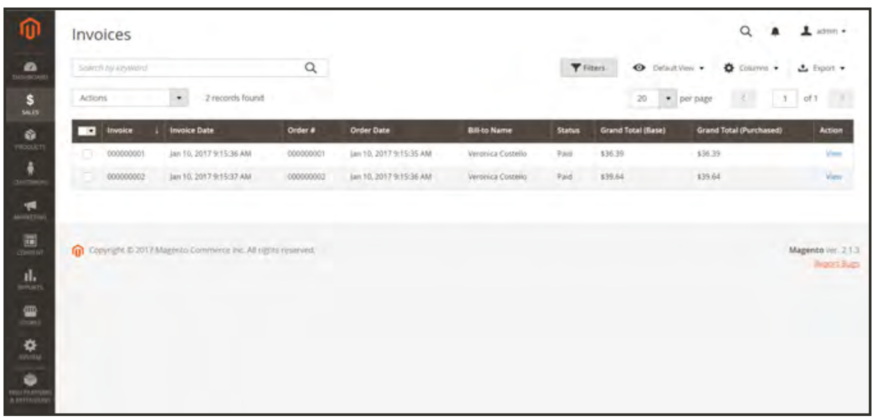
Creating an Invoice

Creating an invoice for an order converts the temporary sales order into a permanent record of the order that cannot be canceled. A new invoice page looks similar to a completed order, with some additional fields. Every activity that is related to an order is noted in the Comments section of the invoice.

Normally, orders are invoiced and shipped after payment is received. However, if the method of payment is a purchase order, the order can be invoiced and shipped before payment is received. You can generate an invoice with a packing slip, and also print shipping labels from your carrier account. A single order can be divided into partial shipments which are invoiced separately, if necessary.

When the state of new orders is set to “Processing,” the option to “Automatically Invoice All Items” becomes available in the configuration. Some credit card payment methods complete the invoicing step as part of the process when Payment Action is set to “Authorize and Capture.” In such a case, the Invoice button does not appear, and the order is ready to ship.

Before an invoice can be printed, it must first be generated for the order. To view or print the PDF, first download and install a PDF reader such as Adobe Acrobat Reader.

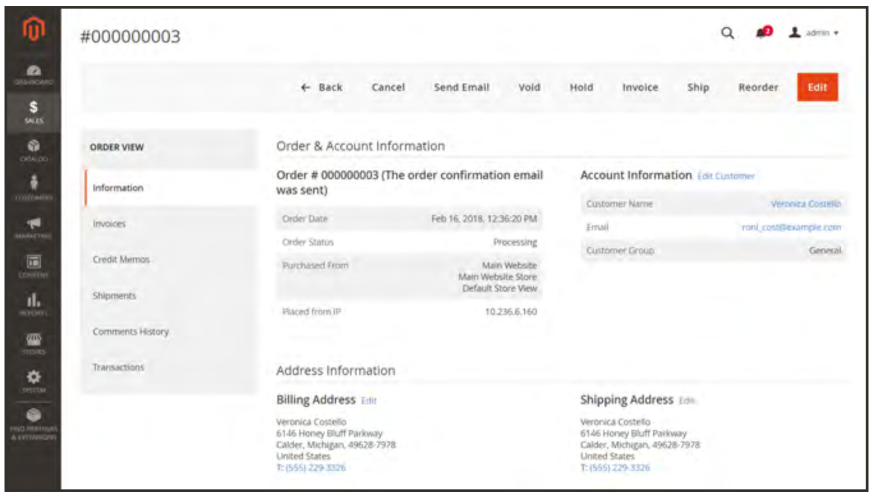


Invoices

To invoice an order:

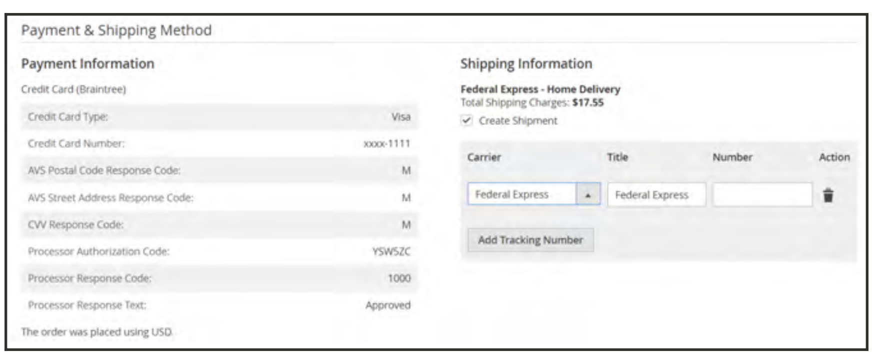
1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the sales order with the status of "Processing" in the grid. Then, do the following:
   a. In the **Action** column, click the **View** link.
   b. In the header of the sales order, choose the **Invoice** option. The new invoice page looks similar to a completed order page, with additional fields that can be edited.

   > The Invoice option does not appear if the payment method is set to "Authorize and Capture."



Invoice Sales Order

3. If the items are ready to ship, you can generate a packing slip for the shipment at the same time you create the invoice. To create a packing slip, do the following:
   a. In the **Shipping Information** section, mark the **Create Shipment** checkbox. A shipment record will be created at the same time the invoice is generated.



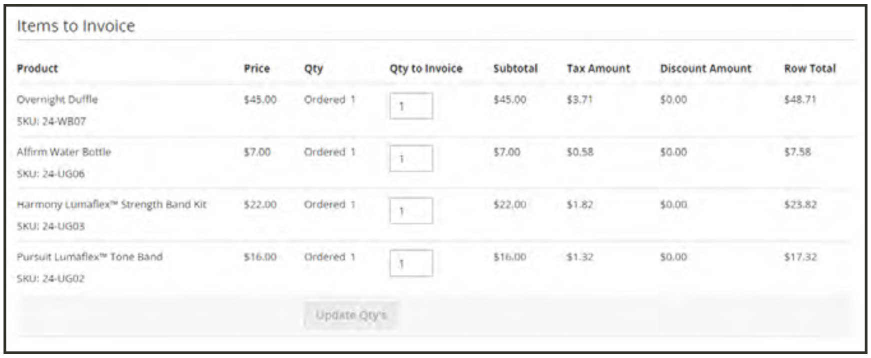
Create Shipment

b. To include a tracking number, tap **Add Tracking Number** . Then, enter the following:

- Carrier
- Title
- Number

c. If you need to generate a partial invoice, do the following:

In the **Items to Invoice** section, update the **Qty to Invoice** column to include only specific items on the invoice. Then, tap **Update Qty's**.


Items to Invoice

Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Total
Overnight Duffle SKU: 24-WB07	$45.00	Ordered 1	1	$45.00	$3.71	$0.00	$48.71
Affirm Water Bottle SKU: 24-UG06	$7.00	Ordered 1	1	$7.00	$0.58	$0.00	$7.58
Harmony Lumaflex™ Strength Band Kit SKU: 24-UG03	$22.00	Ordered 1	1	$22.00	$1.82	$0.00	$23.82
Pursuit Lumaflex™ Tone Band SKU: 24-UG02	$16.00	Ordered 1	1	$16.00	$1.32	$0.00	$17.32

Update Qty's

Items to Invoice

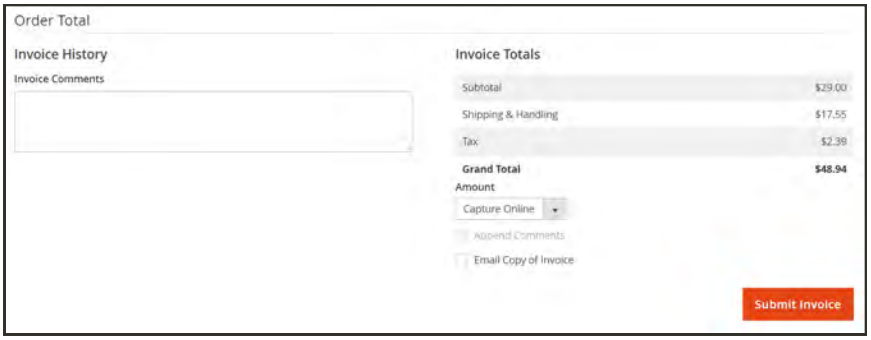
4. If an online payment method was used for the order, set **Amount** to the appropriate option.

5. To notify customers by email when the invoice is generated, do the following:

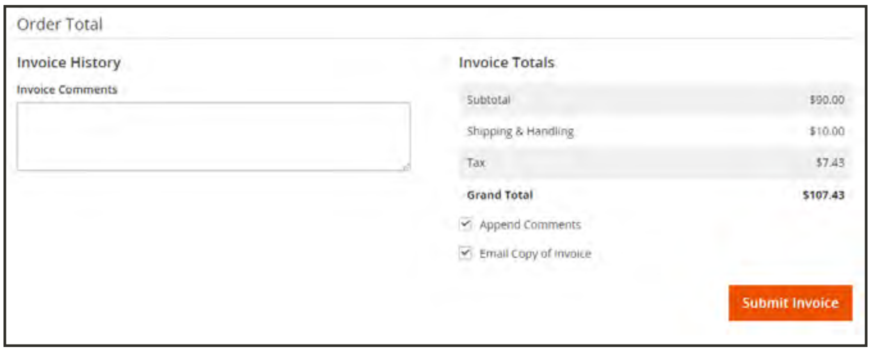
a. Mark the **Email Copy of Invoice** checkbox.

b. Enter any **Invoice Comments**. To include the comments in the notification email, mark the **Append Comments** checkbox.

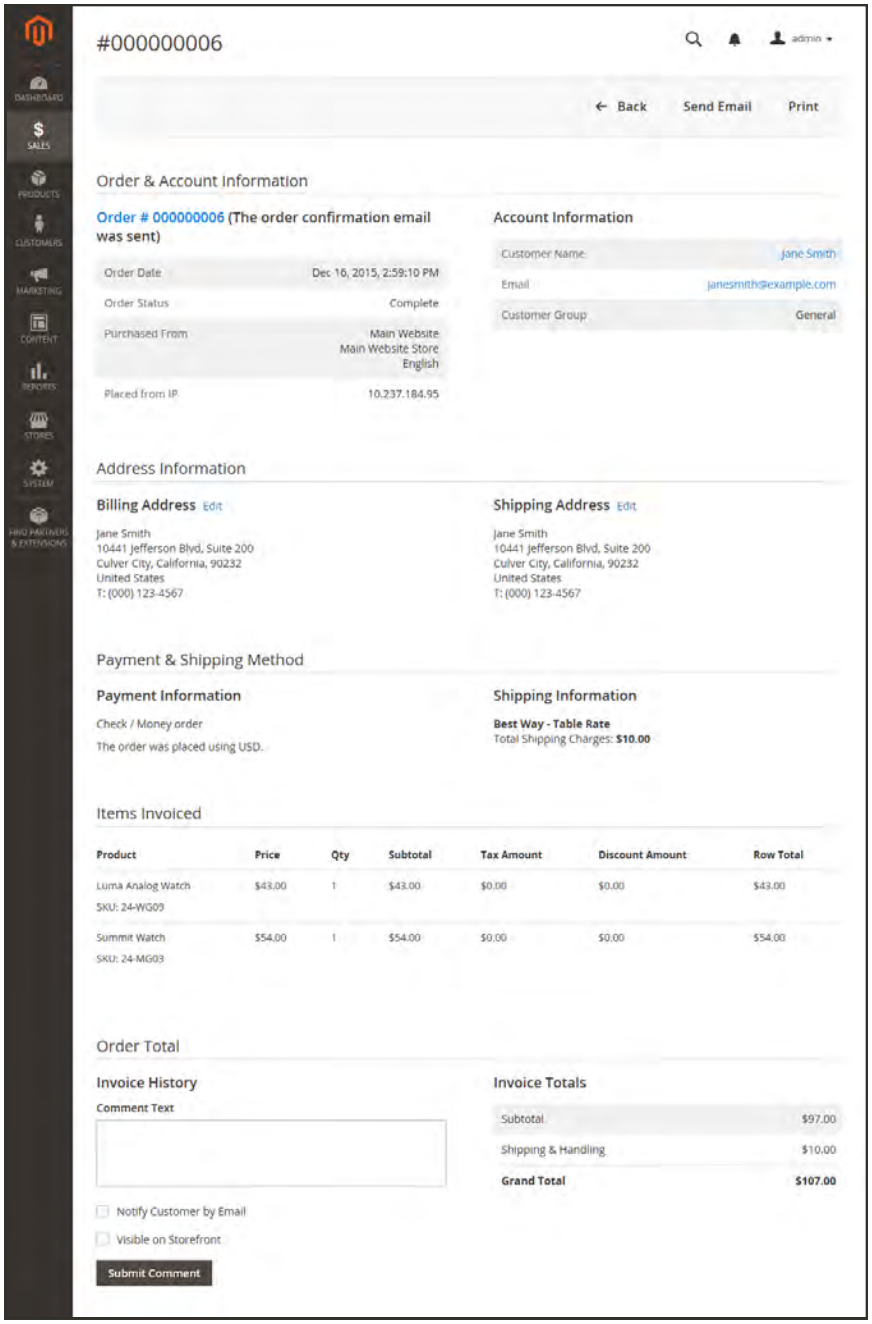
6. When complete, tap **Submit Invoice** at the bottom of the page. The status of the order changes from "Pending" to "Complete."



Submit Invoice (Online Payment Method)



Submit Invoice (Offline Payment Method)

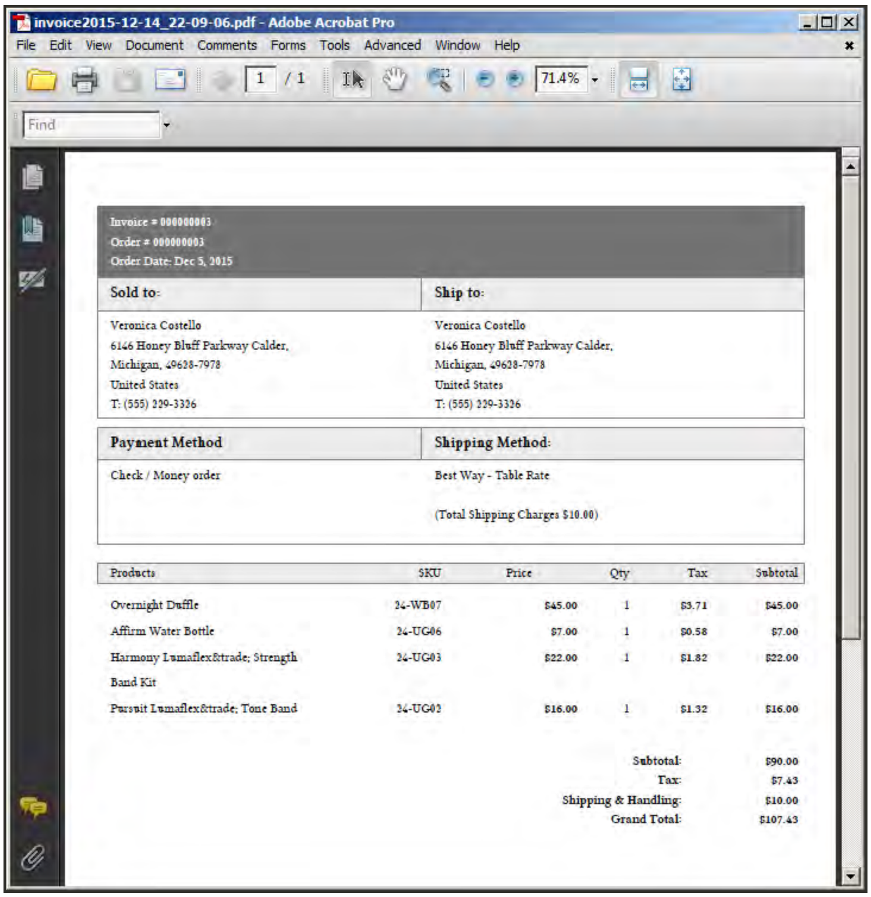


Completed Invoice

To print the invoice:

1. At the top of the workspace, tap **Print** to generate a PDF of the invoice
2. Do one of the following:
   - Send the PDF invoice to a printer.
   - Save the PDF file.

To customize the default invoice, see: Preparing Your Invoice Logo.



Default PDF Invoice

Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	When the invoice is submitted, the system captures the payment from the third-party payment gateway. You have the ability to create a credit memo and void the invoice.
Capture Offline	When the invoice is submitted, the system does not capture the payment. It is assumed that the payment is captured directly through the gateway, and you no longer have the option to capture this payment through Magento. You have the ability to create a credit memo, but you do not have the option to void the invoice. (Even though the order used an online payment, the invoice is essentially an offline invoice.)
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. There is a Capture button in the completed invoice. Before capturing, you are able to cancel the invoice. After capturing you are able to create a credit memo and void the invoice. Do not select Not Capture unless you are certain that you are going to capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured using the Capture button.

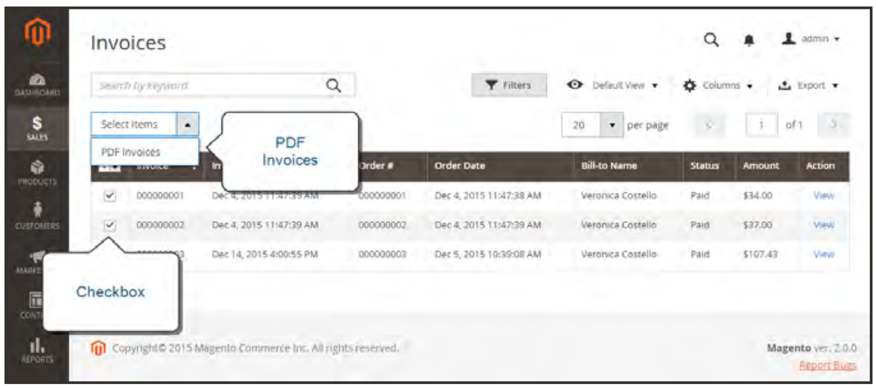
Printing Multiple Invoices

Invoices can be printed individually or as a batch. However, before an invoice can be printed, it must first be generated for the order. To add your logo and address to the invoice, see: Preparing Your Invoice Logo.

> To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

To print multiple invoices:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Invoices**.
2. In the **Invoices** grid, mark the checkbox of each invoice to be printed.
3. Set the **Actions** control to "PDF Invoices."



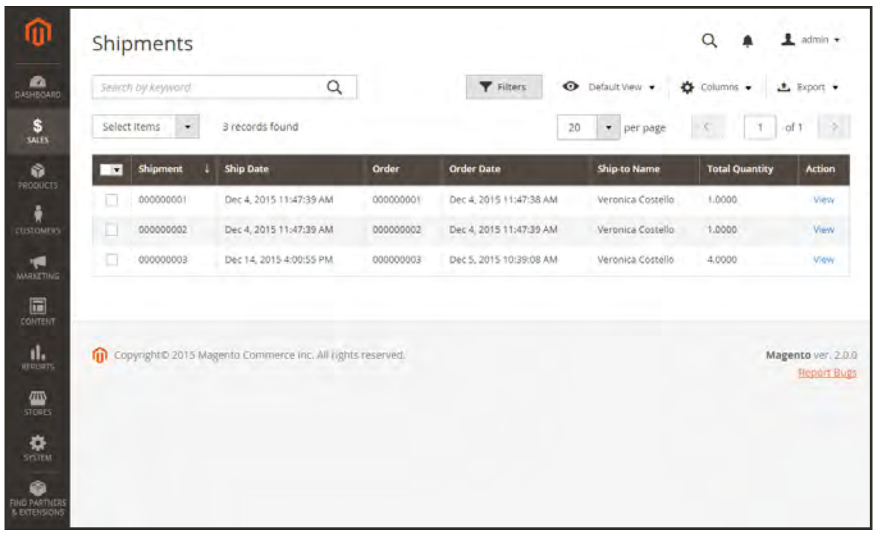
Print Invoices

The invoices are saved in a single PDF file that can be sent to a printer, or saved.

CHAPTER 64:

Shipments

The Shipments grid lists the shipment record of all invoices that have been prepared for shipping. A shipment record can be generated when an order is invoiced.



Shipments

Creating a Shipment

The following instructions walk you through the process of completing a shipment with Magento Shipping.

To create a shipment:

1. On the Admin sidebar, choose **Sales**. Then, choose **Orders**.

2. Find the order in the grid, and open in edit mode.

3. If the order has been paid and invoiced, and is ready to ship, tap **Ship**.

   The sections at the top of the shipment contain name and address and payment information from the sales order.

4. Complete each section of the shipment form as follows:

Items Ordered

For each line item in the order, enter the **Qty Packed**.

Items Ordered

Route Information

Under **Route Information** do the following:

1. Choose the **Origin Location**.
2. If applicable, mark the **International** checkbox.

   For international shipments, the International Item Details and International Shipment Details sections appear in the form.

Route Information

Packages

Under **Packages** do the following:

1. Choose the **Package Type**.
   - If you choose a prepared package type profile, the measurements are entered automatically.
   - If you choose a Custom package, you must enter the Length, Width, Height, and Dim. Units.
2. Enter the **Weight** of the package. If necessary, set the **Weight Units** field to a different unit of measurement that is used for weight.
3. The Contents field displays the value of the Quantity Packed field under Items Ordered. To change the number of ordered items that are packed in the shipment, enter the updated value in the **Contents** field. The Quantity Packed value reflects the change.

Packages

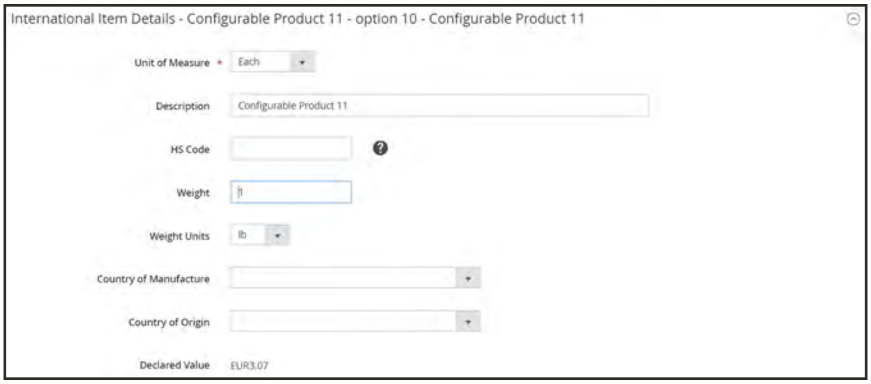
4. To add another package to the shipment, to the following:

   a. Click **Add Another Package**.

b. Complete the description of the package dimensions and weight.

International Item Details (if applicable)

Complete the fields in the **International Item Details** section. If you need help, click the Help ( ) button, or refer to the Field Descriptions at the end of this topic.



International Item Details

International Shipment Details (if applicable)

Complete the fields in the **International Shipment Details** section. If you need help, click the Help ( ) button, or refer to the Field Descriptions at the end of this topic.

International Shipment Details

Add-Ons

1. To give the carrier permission to leave the delivery unattended, mark the **Unattended Delivery** checkbox.

2. To require the carrier to obtain a signature for the delivery, mark the **Signature Required** checkbox.

3. To identify the type of address, set **Destination Address Type** to one of the following:

   - Business
   - Residential
   - Post Office Box

Add-Ons

Shipping Quotes

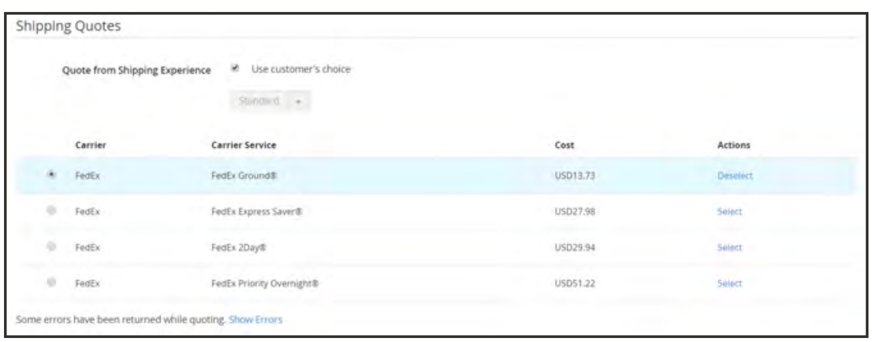
1. Do one of the following:

   - To use the customer's preferred method of shipping, mark the **Customer Preference** checkbox.
   - To override the customer's preferred method, clear the **Customer Preference** checkbox. Then, choose another method.

2. Tap **Get Quotes**.

3. In the list of quotes, select the quote you want to use.

   The Book Shipment button in the header is now active. and the Shipping and Tracking Information is completed for the carrier.



Shipping Quotes

Shipping Comments

Enter a comment in the **Comment Text** box, if needed.

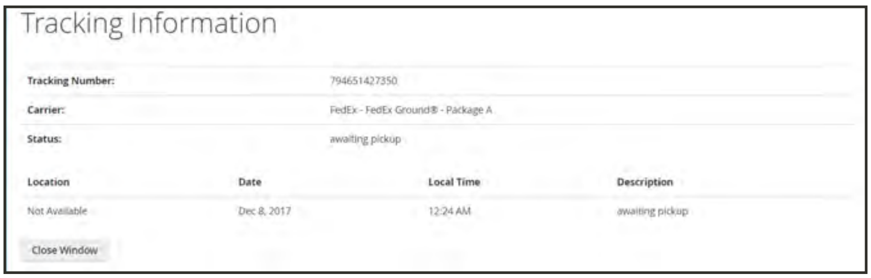
Shipping Comments

5. When the shipment is ready, tap **Book Shipment**.

   The shipment now appears in the Shipments grid, and the Send Tracking Information button appears at the top of the page.

Shipping and Tracking Information

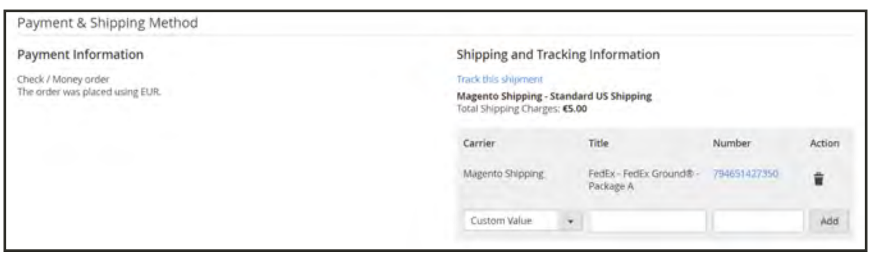
1. To view the tracking information, click the **Tracking Number**.



Tracking Information

2. To send the package tracking information to the customer, tap **Send Tracking Information**.

3. When prompted, tap **OK** to confirm.



Shipping and Tracking Information

6. A message appears at the top of the page that the shipment has been sent, and the **Documentation** section appears in the shipment form.

   a. In the **Action** column, click the link to **Download** the PDF of the package label for the shipment.

Documentation

   b. **Print** the label.

Button Bar

FIELD	DESCRIPTION
Back	Closes the New Shipment form, and returns to the order
Book Shipment	Adds the shipment to the Dispatch grid.
Reset	Restores all fields to original values.

Field Descriptions

FIELD	DESCRIPTION
SHIPPING INFORMATION	
Carrier	The name of the selected carrier
Title	A descriptive name assigned to the package by the carrier.
Number	The linked tracking number that is assigned to the package.
Action	Deletes the carrier selection.
Add	Add another carrier to the shipment.
ROUTE INFORMATION	
Origin Location	Displays a list of available locations.
International	If checked, identifies the shipment as an international shipment.
ITEMS ORDERED	
Description	The description of the item.
SKU	The Stock Keeping Unit of the item.
Weight	The weight of the item.
Qty Ordered	The quantity of the item that was ordered.
Qty Shipped	The quantity of items that have been shipped.
Qty Packed	The number of items included in this package.
PACKAGES	

Field Descriptions (cont.)

FIELD	DESCRIPTION
Code	An automatically generated code that identifies the package.
Package Type	The type of package.
Length	The length of the package.
Width	The width of the package.
Height	The height of the package.
Dim. Units	The number of dimensional units used by the package in the delivery vehicle or container.
Weight	The package weight.
Weight Units	The unit of measurement used to describe the package weight.
Contents	A description of the package contents.
Add Another Package	Adds another package to the shipment.
INTERNATIONAL ITEM DETAILS	
Unit of Measure	The unit of measurement used to describe the shipment.
Description	A description of the items in theshipment.
HS Code	Harmonized System Code A commodity classification developed by the World Customs Organization. Also known as the goods code, statistics code, statistics number, or tariff code. For example: 64-67 Footwear / Headgear
Weight	The weight of the shipment.
Weight Units	The unit of measurement used to describe the weight.
Country of Manufacture	The country where the items in the shipment were manufactured.
Country of Origin	The country where the shipment originated.
Declared Value	The declared value of the items in the shipment.
INTERNATIONAL SHIPMENT DETAILS	

Field Descriptions (cont.)

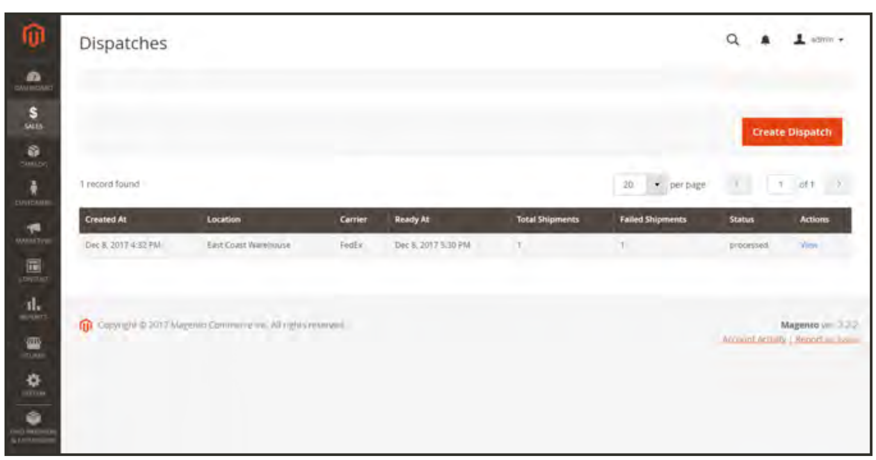
FIELD	DESCRIPTION
Signatory Title	The prefix of the name of the person who is authorized to sign for receipt of delivery.
Signatory First Name	The First Name of the person who is authorized to sign for receipt of delivery.
Signatory Last Name	The Last Name of the person who is authorized to sign for receipt of delivery.
International Commerce Terms (Incoterms)	The code for the International Chamber of Commerce rule that applies to this shipment.
Export Category	The export category that applies to the shipment. Options:
Export Reason	The reason for the export of the shipment.
Dutiable Shipment	Indicates if the shipment is subject to duy. Options: Yes / No
Invoice Number	The number of the associated invoice.
Invoice Date	The date of the associated invoice.
EDN	Export Declaration Number A number issued by the Australian Custom Service when a shipment is accepted for export.
EEL	Exemption and Exclusion Legend When shipping outside the U.S., you must provide either an EEL or a Proof of Filing Citation (PFC).
EEI	Electronic Export Information An electronic declaration of international export information.
ITN	International Transaction Number A number assigned to a shipment that confimrs that the EEI was accepted and is on file in the Automated Export System (AES).
ADD-ONS	
Unattended Delivery	A checkbox that indicates if the carrier can leave the package unattended at the destination address.
Signature Required	A checkbox that indicates if a signature is required.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Destination Address Type	Indicates the type of street address. Options: Residential Business Post Office Box
SHIPPING QUOTES	
Quote from Shipping Experience	Get Quotes — Generates a list of quotes for available carriers. the shipping information and tracking number are completed automatically after the carrier is selected.
SHIPMENT COMMENTS	
Comments	Comments about the shipment are for internal use.
DOCUMENTATION	
Action	**Download** — Download the shipment package label.

Dispatches

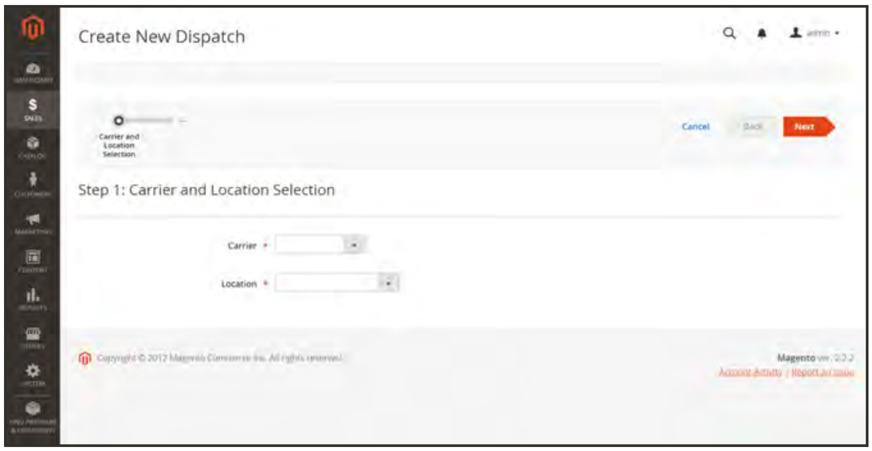
If Magento Shipping is enabled, the Dispatches grid lists all shipments that are ready to ship. For each scheduled pickup, you can create a Dispatch and printed manifest that includes each package that is to be included, per carrier.



Dispatches

To create a dispatch:

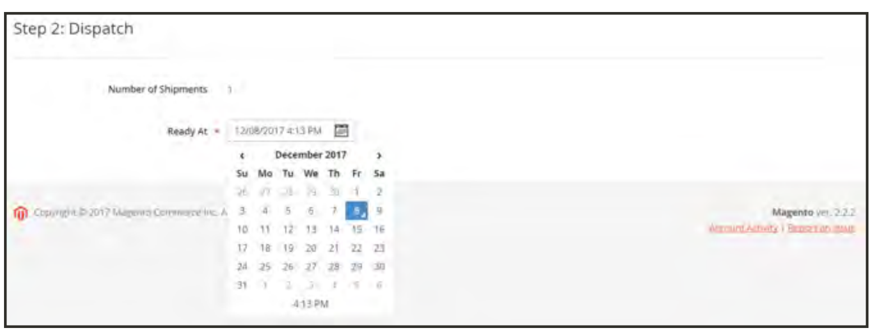
1. On the Admin sidebar, choose **Sales**. Then, choose **Dispatches**.
2. Click **Create Dispatch**. Then, do the following:
   a. Choose the **Carrier**.
   b. Choose the **Location** where the packages in the manifest are to be picked up. Then, tap **Next**.



Carrier and Location Selection

3. To set the date and time of the scheduled pick up, do the following.
   a. In the **Ready At** field, choose the date from the calendar.

> The date and time must be at least 30 minutes in the future.



Dispatch Date

   b. Click the **Time** below the calendar, and choose the scheduled time of the pickup.

Dispatch Time

4. Tap **Finish** to schedule the dispatch.

   The dispatch now appears in the Dispatches grid.

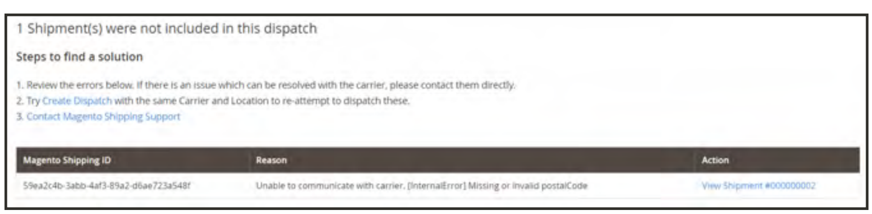
To view the dispatch detail:

1. Find the dispatch in the grid. Then in the **Action** column, click **View**.

Dispatch Information

2. If a problem is encountered while communicating with the carrier, the report will include a failed shipment. Click **Find Solutions** for more information.

   In this case, the problem was caused by a missing or invalid postal code in our sample data.



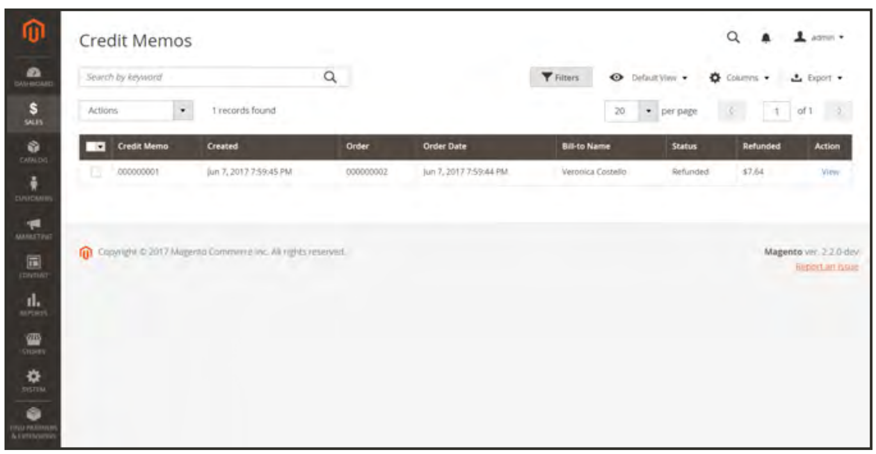
Find a Solution

CHAPTER 65:

Credit Memos

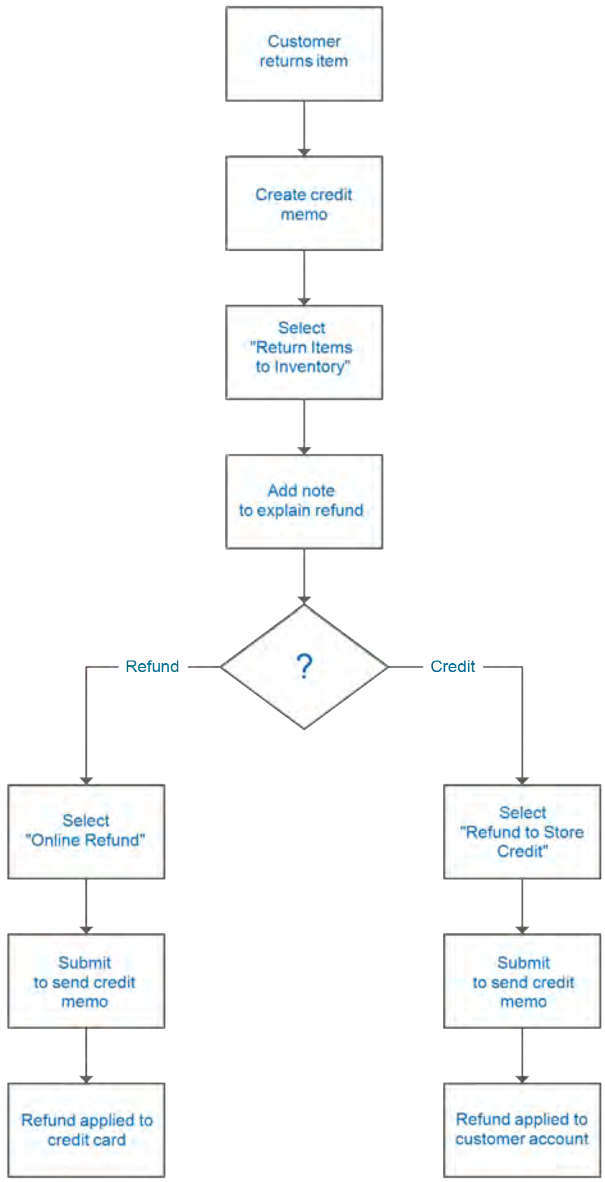
A credit memo is a document that shows the amount that is due the customer for a full or partial refund. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. Before a credit memo can be printed, it must first be generated for the order. The credit memo grid lists the credit memos that have been issued. to customers.

The methods that are available to issue refunds depends on the payment method that was used for the order. Orders that were placed using can be refunded to the respective account. Orders that were paid by credit card through a payment gateway can be refunded online, by the payment processor. Orders that were paid COD or by check or money order are refunded offline.



Credit Memos

Product Return Workflow

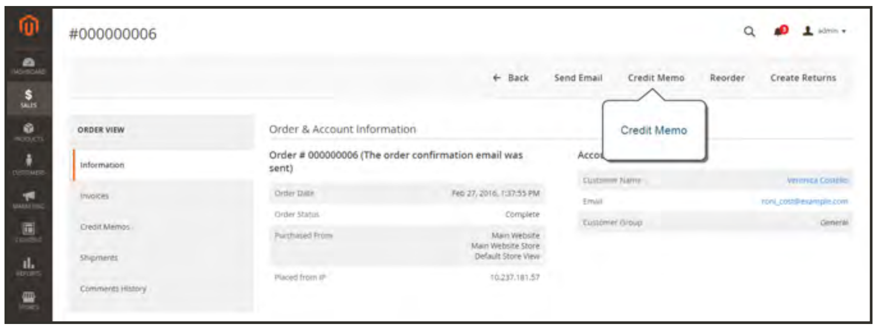


Product Return Workflow

Issuing a Credit Memo

Before a credit memo can be printed, it must first be generated for the order. Any credit memo with a status of "open" has an outstanding refund due. If you create a credit memo for an order that includes gift options, the refund for the gift wrapping and/or printed card appears in the Refund Totals section of the credit memo. To exclude these costs from the amount to be refunded, enter the amount as an Adjustment Fee. If multiple credit memos are issued for the same order, the refund for gift options appears in only the first credit memo.

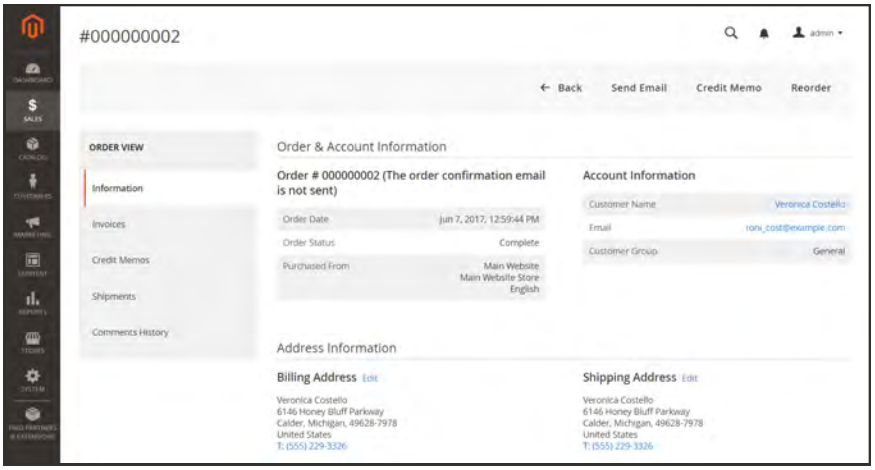
> If using Vertex Cloud, see the Vertex Settings configuration section for information about issuing refunds for sales orders that are invoiced when the status is either "Suspected Fraud" or "Canceled."



Create Credit Memo

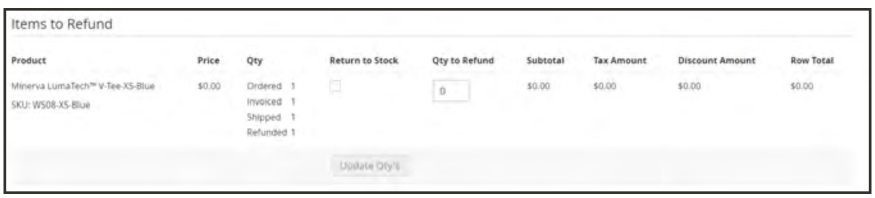
To issue a credit memo:

1. On the Admin sidebar tap **Sales**. Then, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order.
3. In the button bar at the top of the page, tap **Credit Memo**. (The button appears only after an order is invoiced.)



Create Credit Memo

The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice.



Items to Refund

If an online payment method was used, you will not be able to edit these fields.

4. Do one of the following:

   - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
   - If the product will not be returned to inventory, leave the checkbox blank.

   The Return to Stock checkbox appears only if inventory Stock Options are set to “Decrease Stock When Order Is Placed.”

5. Complete the following:

   a. In the **Qty to Refund** box, enter the number of items to be returned. Then, press the **Enter** key to record the change. The Update Qty’s button becomes active.

   b. Enter **0** for the **Qty to Refund** of any items that are not to be refunded.

   c. Tap **Update Qty’s** to recalculate the total. (The amount to be credited cannot exceed the maximum amount that is available for refund.)

6. In the **Refund Totals** section, do the following, as applicable:

a. In the **Refund Shipping** field, enter any amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.

b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (shipping, items, or tax). The amount entered cannot raise the total refund higher than the paid amount.

c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.

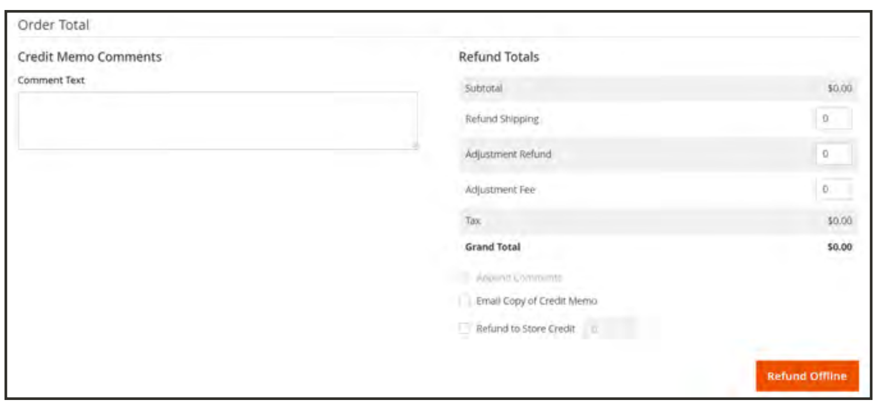
d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer's account balance.

e. To add a comment, enter the text in the **Credit Memo Comments** box.

f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.

g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.



Refund Totals

7. To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type:

- Refund Offline
- Refund Online

8. To add a comment to the completed credit memo, scroll down to the Comments History section, and enter the comment in the box. A history of all activity related to the order is listed below.

   - To send the comment to the customer by email, mark the **Notify Customer by Email** checkbox.
   - To post the comment in the customer's account, mark the **Visible on Frontend** checkbox.

   Then, tap **Submit Comment** .

9. In the panel on the left, choose **Credit Memos**. Any credit memos that are associated with this order appear in the list.

Field Descriptions

FIELD	DESCRIPTION
ORDER & ACCOUNT INFORMATION	
Order Number	The order number appears in the Order & Account Information, followed by a note that indicates if the confirmation email was sent.
Order Date	The date and time the order was placed.
Order Status	Indicates the order status as “Complete.”
Purchased From	Indicates the website, store, and store view where the order was placed.
Placed from IP	Indicates the IP address of the computer from which the order was placed.
Account Information	
Customer Name	The name of the customerwho placed the order. The Customer Name is linked to the customer profile.
Email	The email address of the customer. The email address is linked to open a new email message.
Customer Group	The name of the customer group to which the customer is assigned.
ADDRESS INFORMATION	
Billing Address	The name of the customer who placed the order, followed by the billing address, telephone number and VAT, if applicable. The telephone number is linked to autodial on a mobile device.
Shipping Address	The name of the person to whose attention the order should be shipped, followed by the shipping address and telephone number. The telephone number is linked to autodial on a mobile device.
PAYMENT & SHIPPING METHOD	
Payment Information	The method of payment to be used for the order, and purchase order number, if applicable, followed by the currency that was used to place the order.
Shipping & Handling Information	The shipping method to be used, and any handling fee that is applicable.

Field Descriptions (cont.)

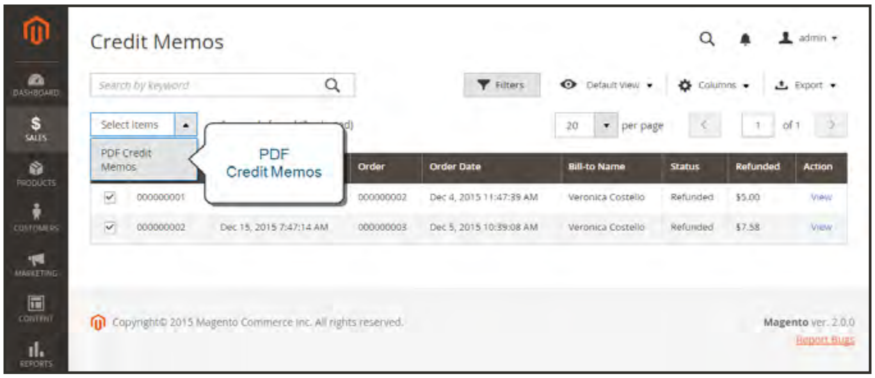
FIELD	DESCRIPTION
ITEMS TO REFUND	
Product	The product name, SKU, and options if applicable.
Price	The purchase price of the item.
Qty	The quantity ordered.
Return to Stock	Checkbox that indicates if the returned item is to be returned to stock.
Qty to Refund	Indicates the number of units returned of the product.
Subtotal	The subtotal is the purchase price multiplied by the quantity of product units returned.
Tax Amount	The amount of tax that applies to the returned item as a decimal value.
Tax Percent	The percentage of tax applied to the returned item as a percentage.
Discount Amount	Any discount that applies to the returned item.
Row Total	The line item total, including applicable taxes that are due for the returned product level, less discounts.
ORDER TOTAL	
Credit Memo Comments	
Comment Text	A text box that is used to enter a comment to the customer about the credit memo.
Refund Totals	
Refund Shipping	The shipping amount to be refunded.
Adjustment Refund	An amount that is added to the total amount refunded as an additional refund that does not apply to any particular part of the order, such as shipping, items, or tax. The amount entered cannot raise the total refund higher than the amount paid.
Adjustment Fee	An amount that is subtracted from the total amount refunded, such as a restocking fee, or an amount that is related to gift wrapping or gift options.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Grand Total	The total amount to be refunded
Append Comments	Checkbox that determines if comments are included in the credit memo.
Email Copy of Credit Memo	Checkbox that determines if a copy of the credit memo is emailed.
Refund to Store Credit	Checkbox that determines if the total is to be refunded to store credit.
REFUND BUTTONS	
The payment method used for the order determines that refund buttons that are available for a credit memo.	
Refund Online	If the original purchase was paid by credit card through a payment gateway, the refund amount is managed by the payment processor. To manage refunds, see the documentation provided by your payment provider.
Refund Offline	If the original purchase was paid by check or money order, the refund is paid directly to the customer, by issuing a check, gift card, or cash if you have a brick and mortar storefront. The credit memo serves as a record of the offline transaction.

Printing Credit Memos

To print or view the completed credit memo, you must have a PDF reader installed on your computer. You can download Adobe Reader at no charge.



Credit Memos

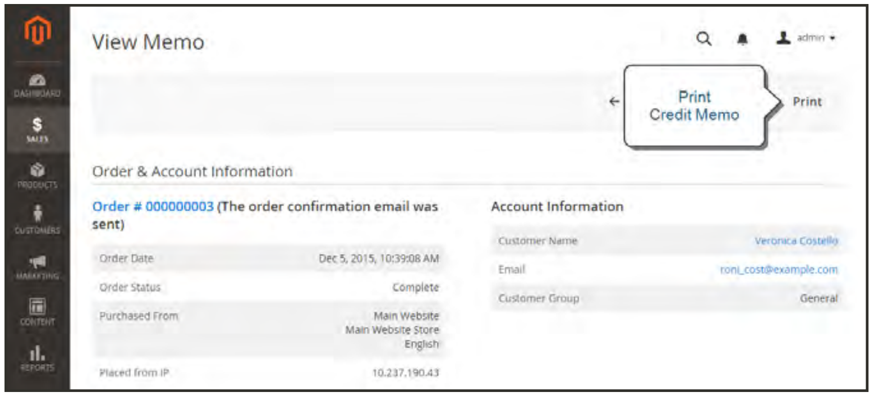
To print a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.

2. Use one of the following methods to print the credit memo:

Method 1: Print current credit memo

1. In the grid, open the credit memo.
2. Tap **Print**.



Print Credit Memo

Method 2: Print multiple credit memos

1. In the list, mark the checkbox of each credit memo that you want to print.
2. Set the **Actions** control to “PDF Credit Memos. Then, tap **Submit**.
3. When prompted, do one of the following:
   - To save the document, tap **Save**. Then, follow the prompts to save the file to your computer. When the download is complete, open the PDF in Adobe Reader, and print the document.
   - To view the document, tap **Open**. The printed-ready PDF credit memo opens in Adobe Reader. From here, you can either print the credit memo or save it to your computer.

CHAPTER 66:

Store Credit

Store credit is an amount that is restored to a customer account. Customers can use their store credit to pay for purchases, and administrators can use store credit for cash refunds. Gift card balances can be credited to the customer's account, instead of using the gift card code for future purchases.

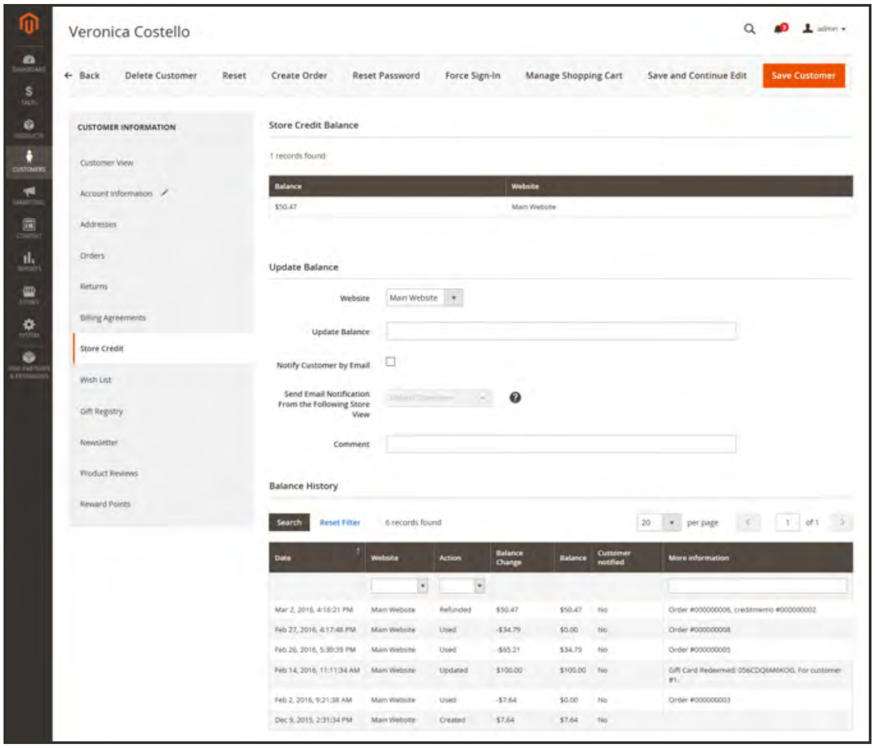
After an order is paid and invoiced, all of the order, or a portion of it, can be refunded by issuing a credit memo. A credit memo differs from a refund because the amount of the credit is restored to the customer's account where it can be used for future purchases. In some cases, a refund can be given at the same time that a credit memo is issued, and applied to the customer's balance of store credit. The amount of store credit that is available in the customer's account is specified in the configuration.

Store Credit Workflow

1. **Customer Login.** Customer logs into account before beginning the checkout process.
2. **Use Store Credit.** During the Review & Payments step of the checkout process, the customer elects to "Use Store Credit" as a payment option. The available balance is shown in parentheses If the available balance is greater than the order grand total, the other payment methods disappear.
3. **Credit Applied to Order.** The amount of store credit that is applied to the order appears with the order totals, and is subtracted from the grand total.
4. **Customer Balance Adjusted.** The customer's available balance is adjusted when the order is placed.

Applying Store Credit

Administrators can view the credit balance and history from the account of a customer, and also apply store credit to a purchase.



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.

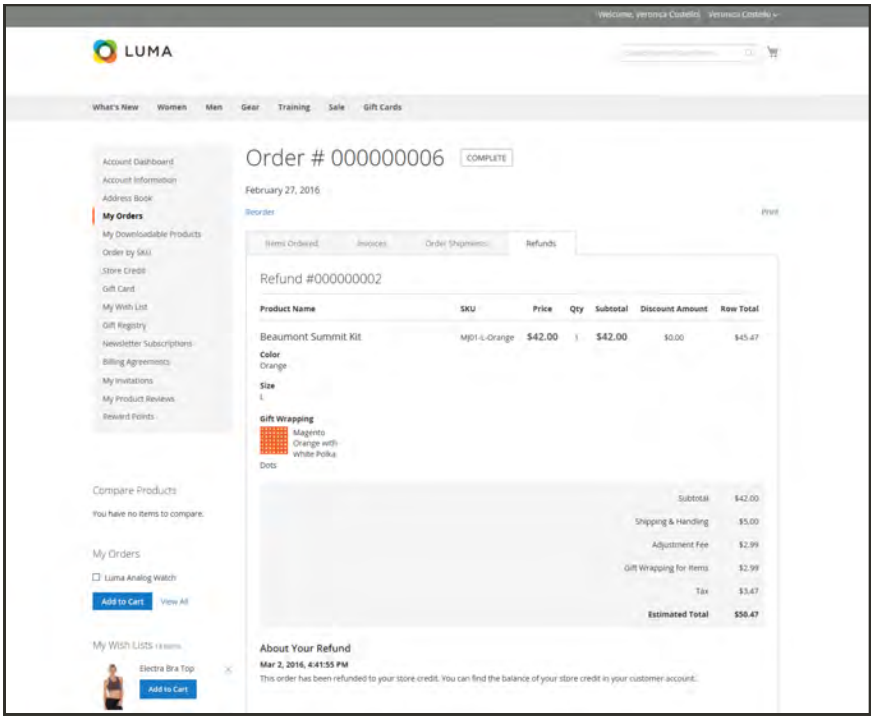
Store Credit Options

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

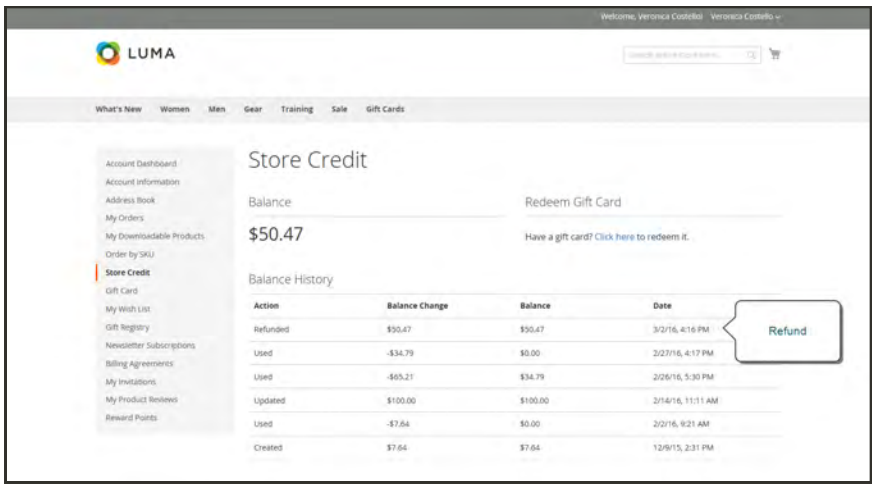
To view a refund from your customer account:

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.



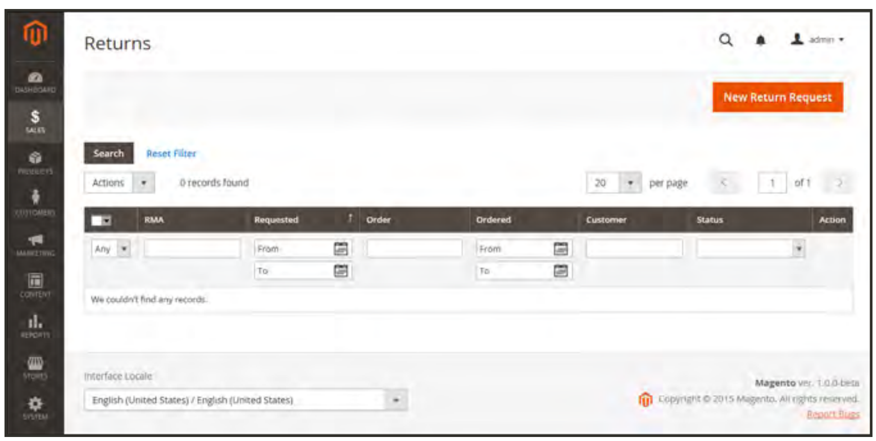
Amount Refunded to Store Credit

CHAPTER 67:

Returns

A returned merchandise authorization (RMA) can be granted to customers who request to return an item for replacement or refund. Typically the customer contacts the merchant to request a refund. If approved, a unique RMA number is assigned to identify the returned product. In the configuration, you can either enable RMA for all products, or allow RMA for only certain products. The Returns grid lists the current returned merchandise requests (RMAs) , and is used to enter new return requests.

RMAs can be issued for simple, grouped, configurable, and bundle product types. However, RMAs are not available for virtual products, downloadable products, and gift cards.



Returns

RMA Workflow

1. **Receive Request.** Both registered customers and guests can request an RMA. You can also submit an RMA request from the Admin.

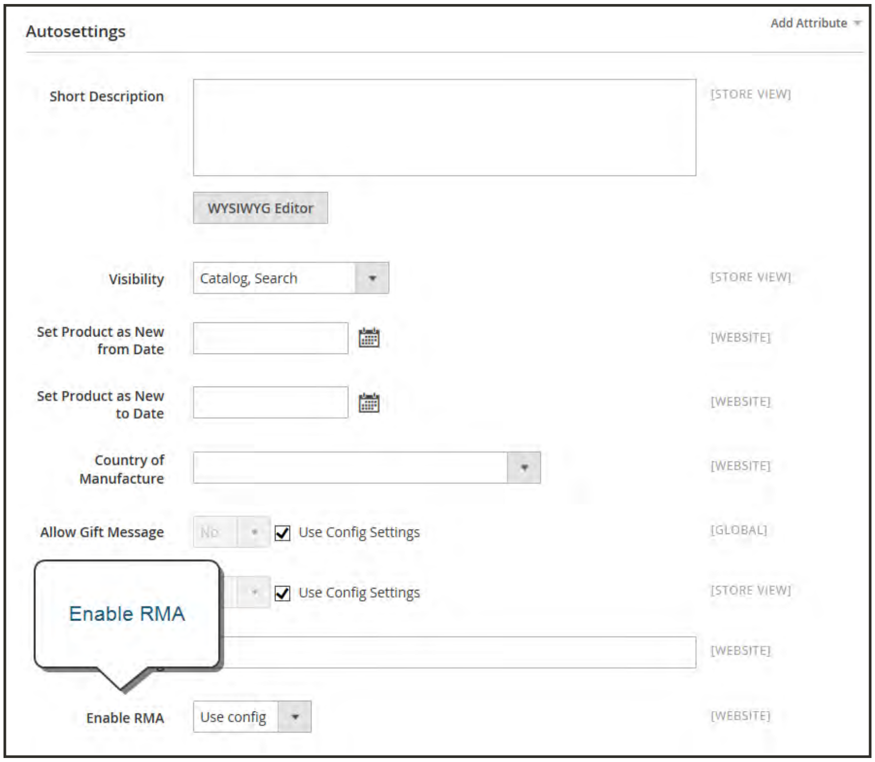
2. **RMA Issued.** After considering the request, you can authorize it partially, completely, or cancel the request. If you authorize the return and agree to pay for the return shipment, you can create a shipment order from the Admin with a supported carrier.

3. **Merchandise Returned.** The customer follows your shipping instructions and returns the merchandise to you,

4. **Receive Merchandise.** You receive and approve the return partially or completely, or cancel the RMA.

Configuring Returns

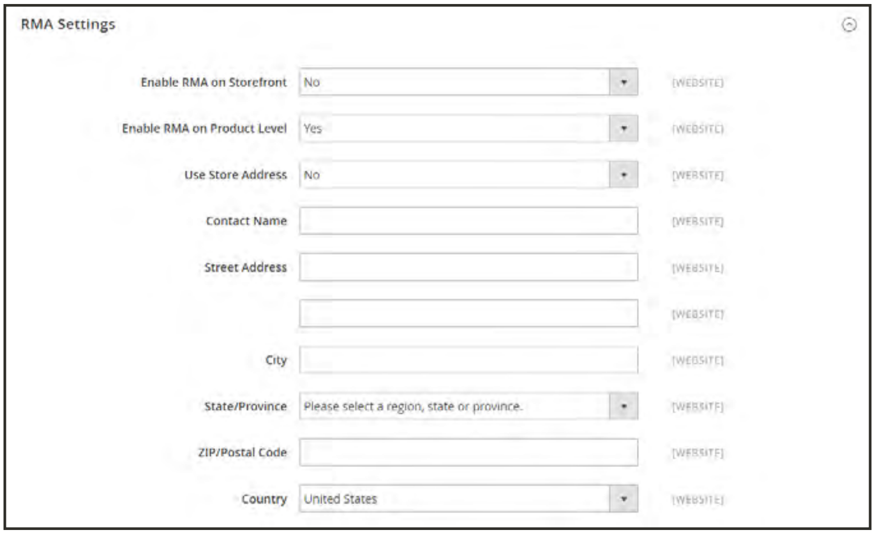
By default, RMA requests can be submitted by customers from the storefront. Requests to return individual items are managed by the Enable RMA attribute, which is managed in the Advanced Settings section of each product record, under Autosettings. By default, the configuration settings are applied to the product. If Enable RMA is set to “No,” the product does not appear in the list of items that are available for return. An RMA can be generated only if there is an item in the order that is available for return. Changes to the value of the Enable RMA attribute apply to both new and existing orders.



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:



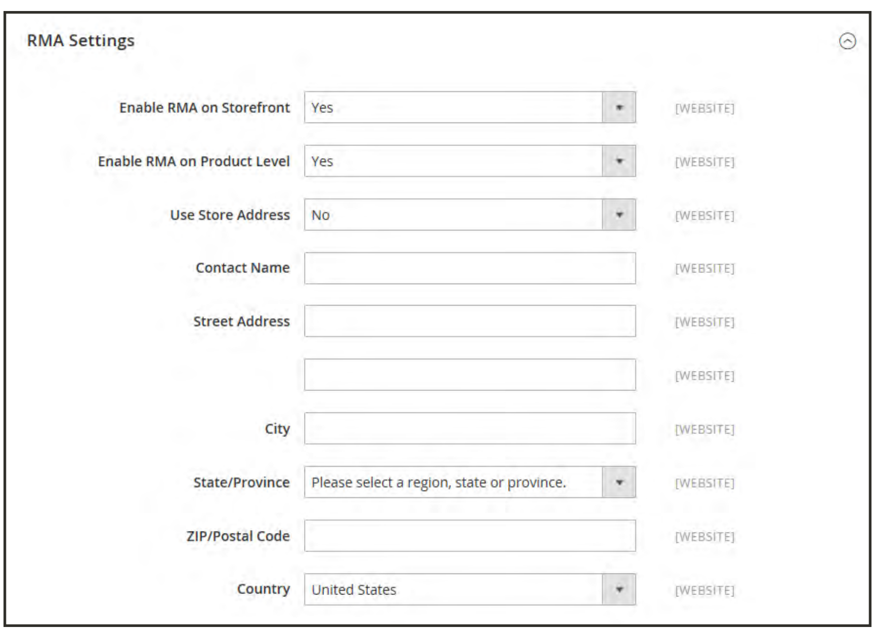
RMA Settings

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.

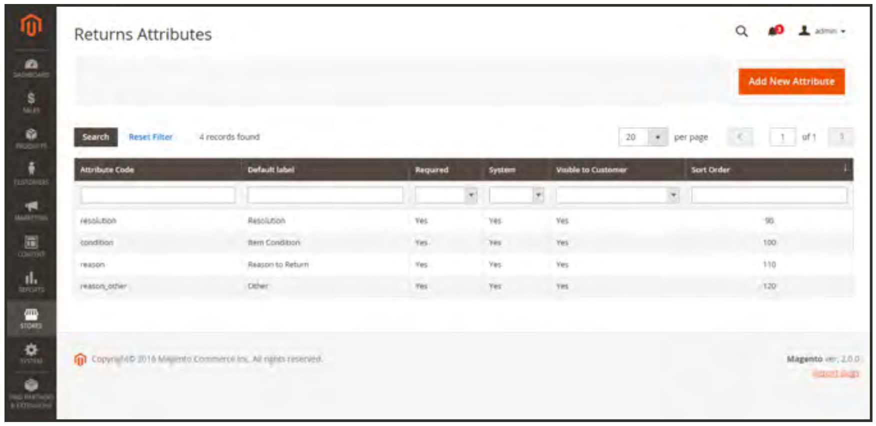


RMA Settings with Alternate Address

4. When complete, tap **Save Config**.

Returns Attribute

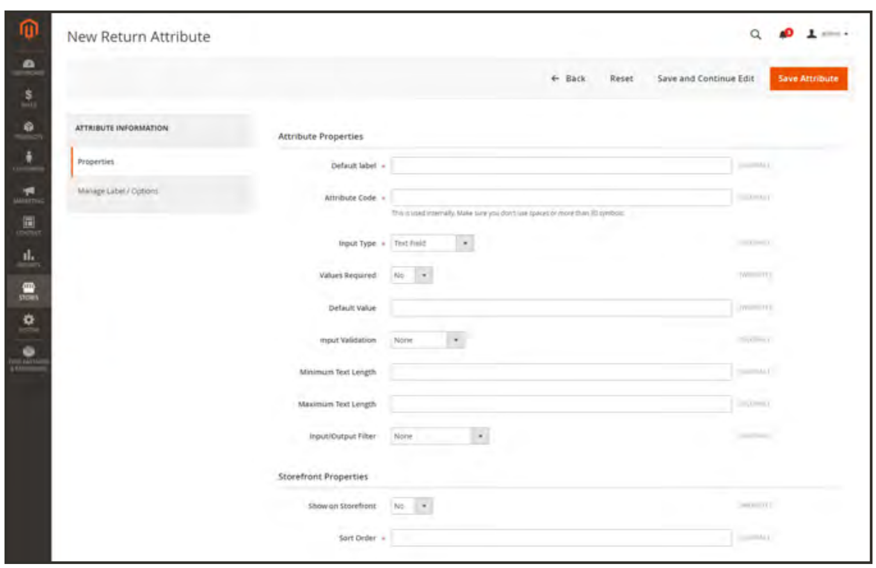
The Returns Attributes are used to store information that is needed during the product return process. The default attributes include the condition of the returned product, the reason for the return, and a field that indicates how the return was resolved. The process to create a returns attribute is similar to creating a customer attribute.



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

CHAPTER 68:

Billing Agreements

The Billing Agreements grid lists all billing agreements between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer’s billing agreements. A canceled billing agreement can be deleted only by the store administrator.

Billing Agreements

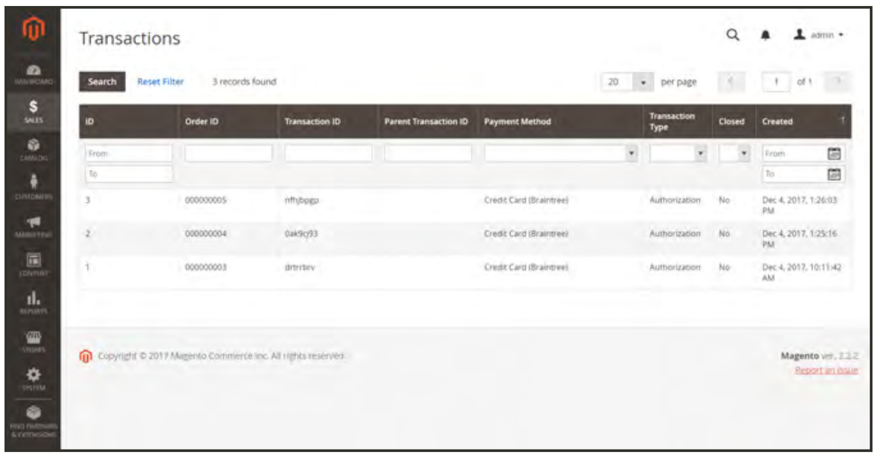
CHAPTER 69:

Transactions

The Transactions grid lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

To view transactions:

On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Transactions**.



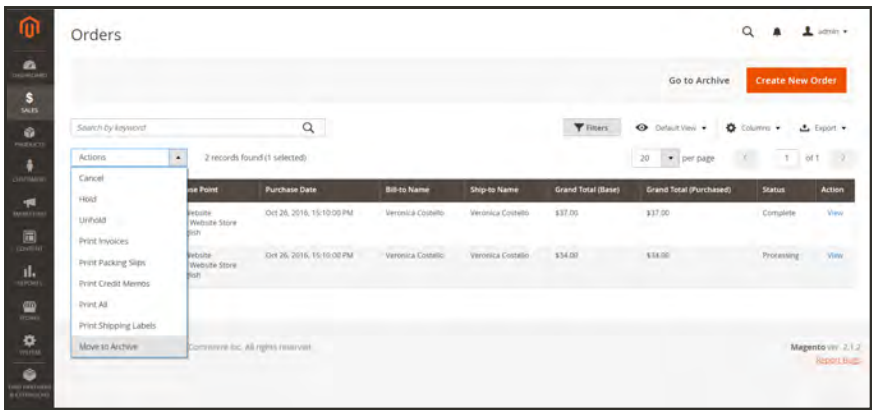
Transactions

CHAPTER 70:

Archive

Archiving orders on a regular basis improves performance and keeps your workspace free of unnecessary information, so you can focus on current business. Invoices, shipments, and credit memos can be archived automatically or manually, and can be viewed at any time.

> The Archive option appears in the Sales menu only when archiving is enabled.



Move Order to Archive

To enable archiving:

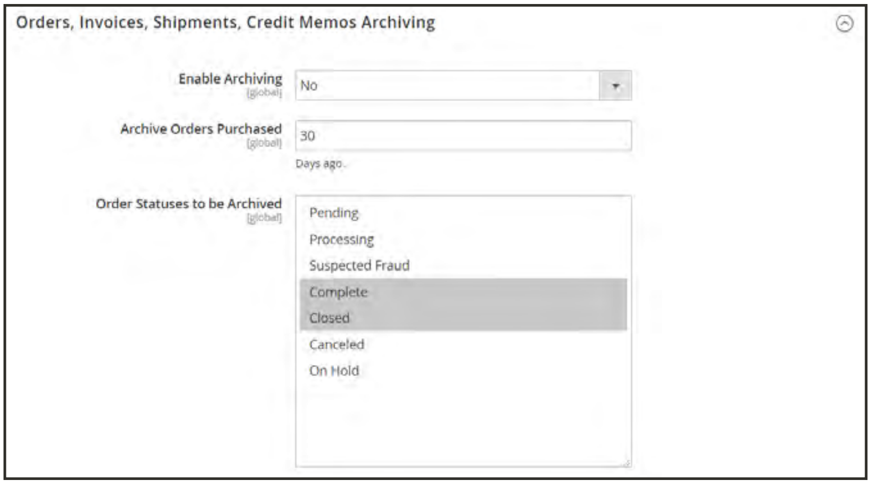
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales**.
3. Expand the **Orders, Invoices, Shipments, Credit Memos Archiving** section, and do the following:

   a. Set **Enable Archiving** to "Yes."

   b. In the **Archive Orders Purchased** field, enter the number of days to wait before completed orders are archived.

   By default ,orders are archived thirty days after the purchase.

   c. In the list, select each **Order Status to be Archived**. (Hold down the Ctrl key, and click the status of each item to be archived.)



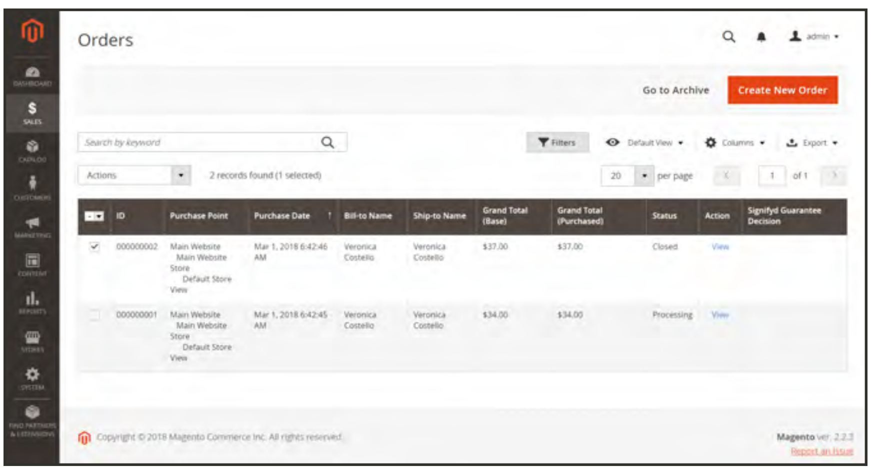
Orders, Invoices, Shipments, Credit Memos Archiving

4. When complete, tap **Save Config**.

To manually archive an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.

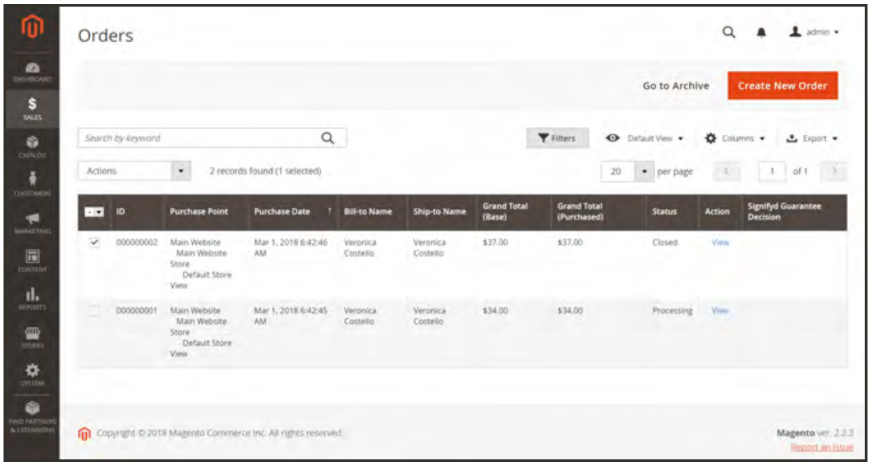
2. Find the order in the grid. Then, mark the checkbox in the first column.



Mark the Order(s) to Archive

3. Set the **Actions** control to “Move to Archive.”

   Then, look for the message that order has been archived.



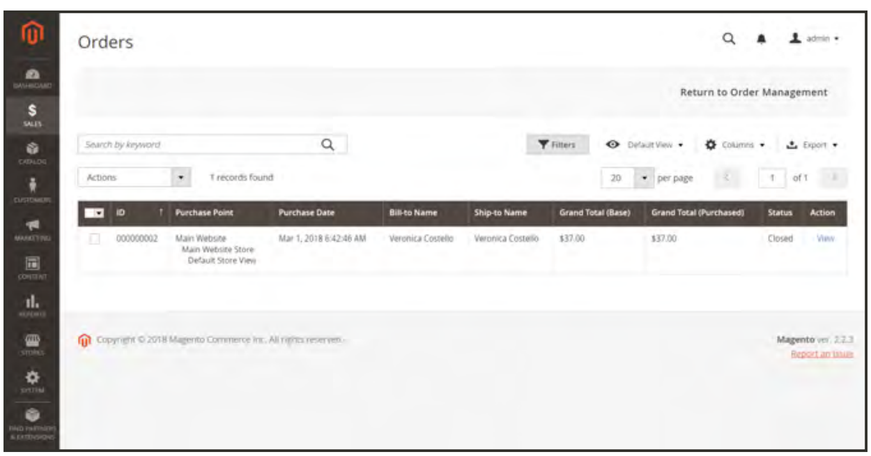
Mark Checkbox

To view an archived order:

1. Do one of the following:
   - In the button bar above the Orders grid, click **Go to Archive**.
   - On the Admin sidebar, tap **Sales**. Then under **Archive**, choose **Orders**.

> Like the Orders page, the title of the archived orders page is "Orders." The only noticeable difference is the option in the button bar to "Return to Order Management." The URL of the page also indicates that you are in the order archive.

2. In the **Action** column, click **View**.



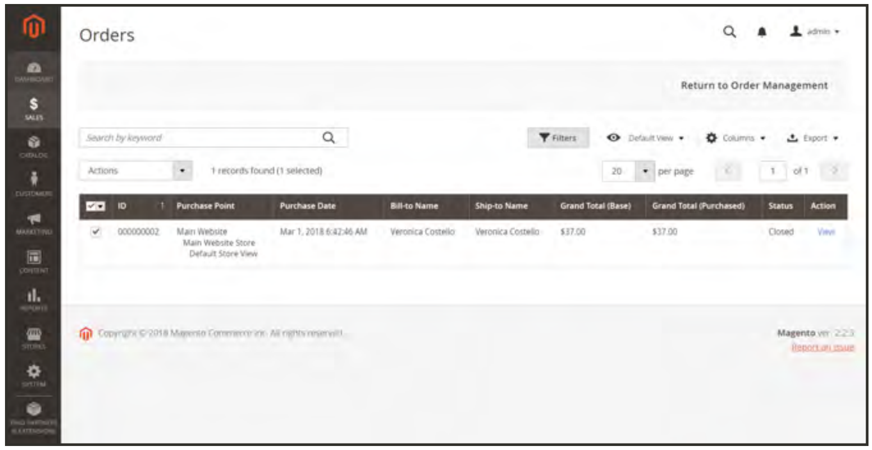
View Archived Order

To restore an archived order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.

2. In the button bar, click **Go to Archive**.

3. Mark the checkbox of the archived order to be restored.



Select Order to be Restored

4. Set the **Actions** control to "Remove to Archive."

   Look for the message that the archived order has been removed from the archive.

5. In the button bar, click **Return to Order Management**.

Payments

Contents

In this section of the guide, you will learn about the payment methods, services, and gateways that you can make available to your customers, and how to configure them.

CHAPTER 71:

Recommended Solutions

The following payment solutions provide an easy way for merchants who are just starting out to accept online payments. As your business grows, you can combine these with additional PayPal payment solutions.

PayPal Express Checkout

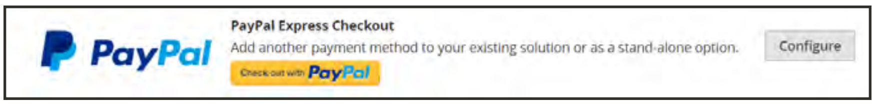
Use PayPal Express Checkout as a standalone option, or combine it with another PayPal payment solution.

Braintree

Braintree allows you to accept credit/debit cards and PayPal without any setup or monthly fees. Your customers never leave your store to complete the purchase.

PayPal Express Checkout

PayPal Express Checkout helps boost sales by giving your customers the ability to pay by credit card or from the security of their personal PayPal accounts. During checkout, the customer is redirected to the secure PayPal site to complete the payment information. The customer is then returned to your store to complete the remainder of the checkout process. Choosing Express Checkout adds the familiar PayPal button to your store, which has been reported to increase sales.*



Customers with current PayPal accounts can make a purchase in a single step by clicking the “Check out with PayPal” button. Express Checkout can be used as a standalone, or in combination with one of PayPal’s All-In-One solutions. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal.

> PayPal has deprecated support for the sale of digital goods through PayPal Express Checkout, and recommends that you use either PayPal Payments Standard or any other PayPal payment gateway to process any order that includes virtual products.

Requirements

- Merchant: Personal PayPal Account
- Customer: Personal PayPal Account

Checkout Workflow

Unlike other payment methods, PayPal Express Checkout allows the customer to check out at the beginning of the usual checkout workflow from the product page, the mini shopping cart, and shopping cart.

1. **Customer Places Order.** The customer taps the “Check out with PayPal” button. .

2. **Customer Is Redirected to PayPal Site.** The customer is redirected to the PayPal site to complete the transaction. / The customer taps the “Check out with PayPal” button. and is redirected to the PayPal site to complete the transaction.

3. **Customer Logs into their PayPal Account.** The customer must log in to their PayPal account to complete the transaction. The payment system uses the customer’s billing and shipping information from their PayPal account.

4. **Customer Returns to the Checkout Page.** The customer is redirected back to the checkout page in your store to review the order.

5. **Customer Places Order.** The customer places the order, and the order information is submitted to PayPal.

6. **PayPal Settles the Transaction.** PayPal receives the order and settles the transaction.

PayPal Express Checkout does not support orders with multiple-addresses.

Setting Up PayPal Express Checkout

You can have two PayPal solutions active at the same time: Express Checkout, plus an All-In-One solution. If you enable a different solution, the one used previously is automatically deactivated.

Process Overview:

Step 1: Configure Your PayPal Account
Step 2: Complete the Required Settings
Step 3: Advertise PayPal Credit
Step 4: Complete the Basic Settings
Step 5: Complete the Advanced Settings

Step 1: Configure Your PayPal Account

1. Before you begin, you must configure your PayPal merchant account on the PayPal website.

   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.

When testing the configuration in a sandbox, use only credit card numbers that are recommended by PayPal. When you are ready to "go live," return to the configuration and set Sandbox Mode to "No."

e. If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to "Yes." Then,, complete the following:

- Proxy Host
- Proxy Port

4. When these sections are complete, set **Enable this Solution** to "Yes."

5. To enable PayPal In-Context Checkout, do the following:

a. Set **Enable In-Context Checkout Experience** to "Yes."

b. Enter your PayPal **Merchant Account ID**.

Your Merchant Account ID is in your PayPal business account profile.

6. To offer financing through PayPal to your customers, see PayPal Credit to learn more.

You have now completed the Required PayPal Settings. At this point, you can either continue with the Basic and Advanced Settings, or click the **Save Config** button. You can return later fine-tune the configuration.

Step 2: Complete the Required Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
4. In the **Merchant Location** section, select the **Merchant Country** where your business is located.

5. Under Recommended Solutions in the **PayPal Express Checkout** section, tap **Configure**. Then, do the following:

   a. Enter the **Email Address** that is associated with your PayPal merchant account.

   > **Important!** Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

   b. Set **API Authentication Methods** to one of the following:

   - API Signature
   - API Certificate

   c. If necessary, tap **Get Credentials from PayPal**. Then, complete the following:

   - API Username
   - API Password
   - API Signature

   d. If you are using credentials from your sandbox account, set **Sandbox Mode** to "Yes."

   If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.

   e. If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to "Yes." Then,, complete the following:

   - Proxy Host
   - Proxy Port

6. Set **Enable This Solution** to "Yes."

7. If you want to offer PayPal Credit to your customers, set **Enable PayPal Credit** to "Yes."

   You have now completed the required settings. You can either continue with the remaining settings, or save and return later fine-tune the configuration.

Step 4: Complete the Basic Settings

1. Expand the **Basic Settings - PayPal Express Checkout** section.

2. Enter a **Title** to identify this payment method during checkout. It is recommended to set the title to "PayPal" for each store view.

3. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which PayPal Payments Standard is listed with the other methods. Payment methods appear in ascending order based on the Sort Order value.

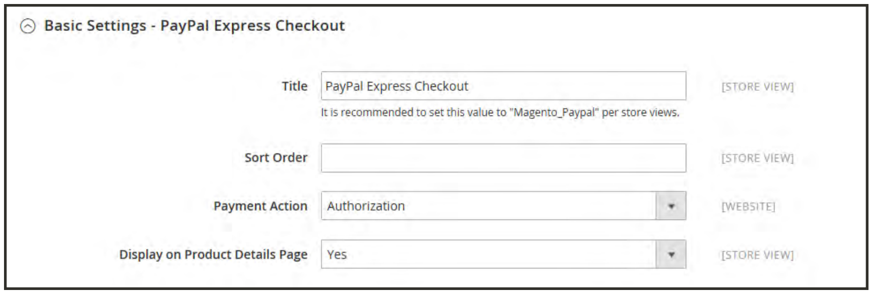
4. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is "captured" by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer's account.
Order	The amount of the order is neither captured nor authorized in the customer's balance, bank account, or credit card at PayPal. The Order payment action represents an agreement between the PayPal payment system and the merchant, which enables the merchant to capture one or more amounts up to the "ordered" total from the customer's buyer account, over a period of up to 29 days. After the funds are "ordered," the merchant can capture them at any time during the following 29 day period. Capturing of the order amount can be done only from the Magento Admin by creating one or more invoices.

5. To display the "Check out with PayPal" button on the product page, set **Display on Product Details Page** to "Yes."

6. If **Payment Action** is set to "Order," complete the following fields:

Authorization Honor Period (days)	Determines how long the primary authorization remains valid. The value should be equal to the corresponding value in your PayPal merchant account. The default value in your PayPal merchant account is 3. To increase this number you need to contact PayPal. The authorization becomes invalid at 11:49 p.m., U.S. Pacific Time, of the last day.
Order Valid Period (days)	Determines how long the order remains valid. When the order becomes invalid, you can no longer create invoices for it. Specify the value equal to the Order Valid Period value in your PayPal merchant account. The default value in your PayPal merchant account is 29. To change this number, you must contact PayPal.
Number of Child Authorizations	Specifies the maximum number of authorizations for a single order, which determines the maximum number of online partial invoices that you can create for an order. The number in this field should be equal to the corresponding setting in your PayPal merchant account. The default number of child authorizations in your PayPal account is 1. To increase this number, you must contact PayPal.



Basic Settings

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:

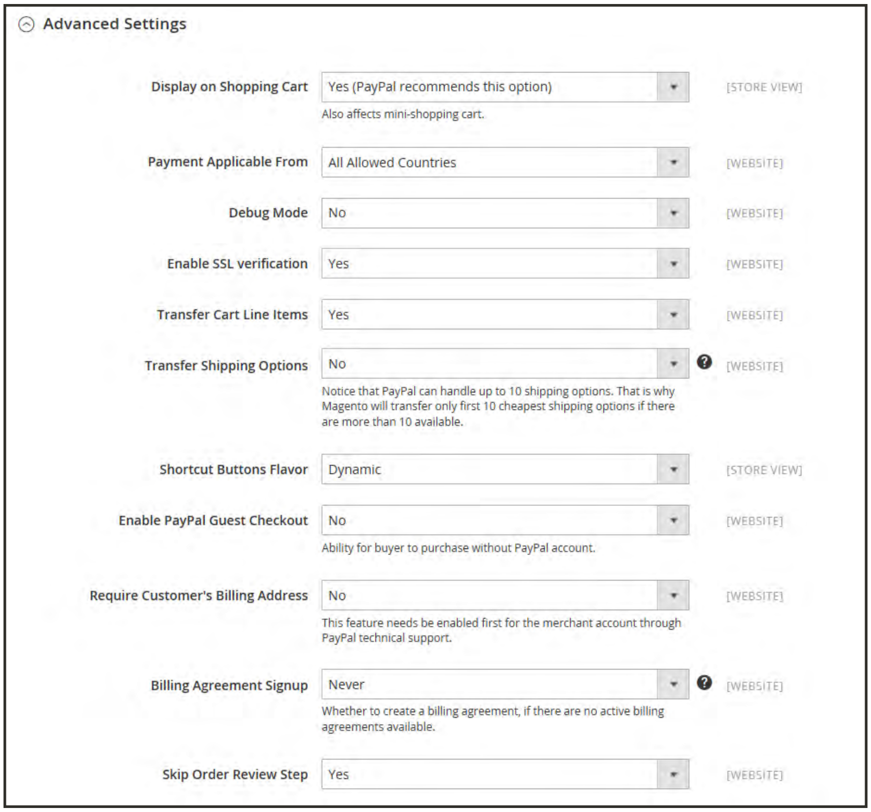
Yes	Requires the customer's billing address for all purchases.
No	Does not require the customer's billing address for any purchases.
For Virtual Quotes Only	Requires the customer's billing address for virtual quotes only.

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.

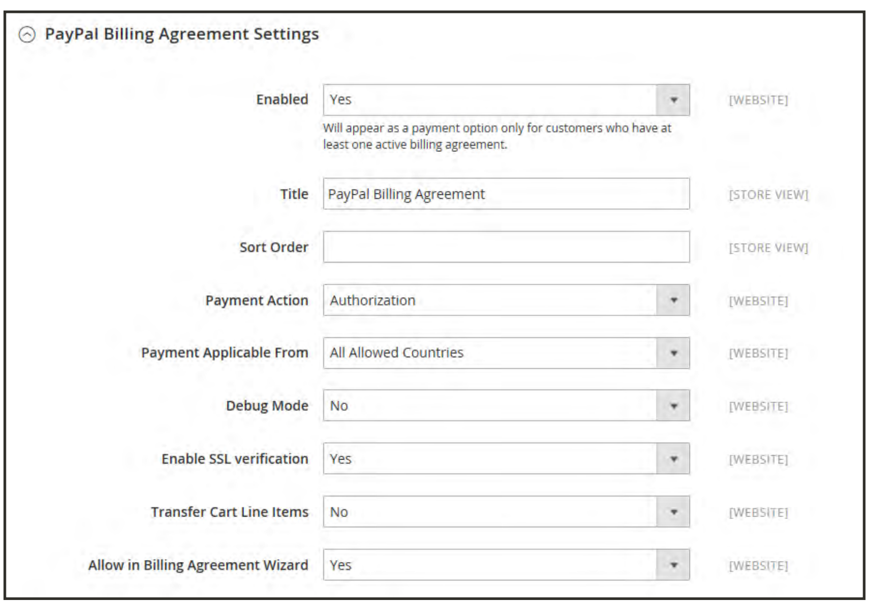
e. To record communications with the payment system in the log file, set **Debug Mode** to "Yes."

> 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."



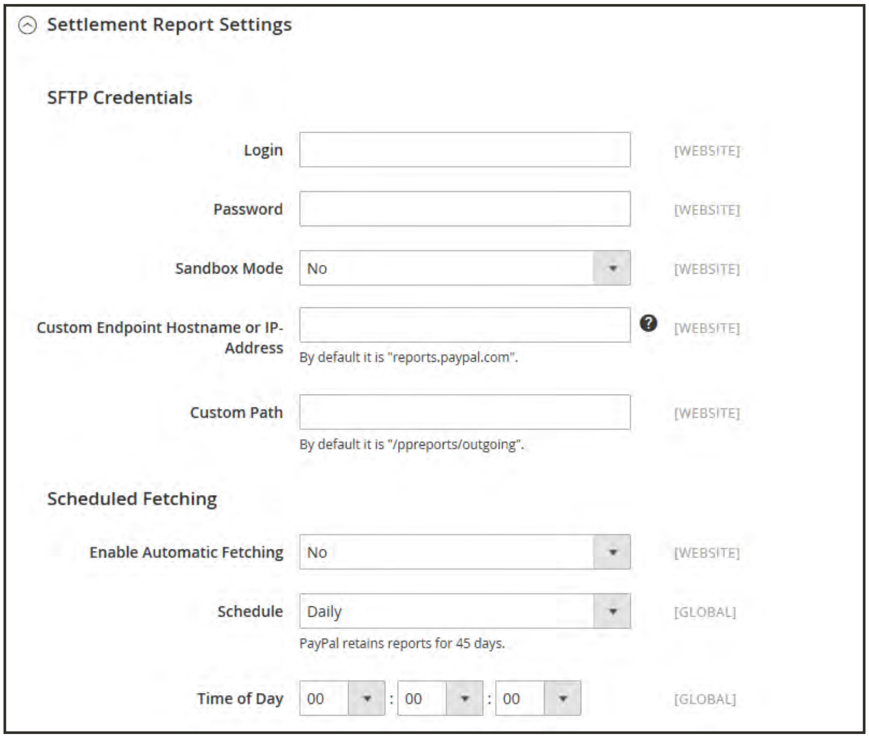
Billing Agreement Settings

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:

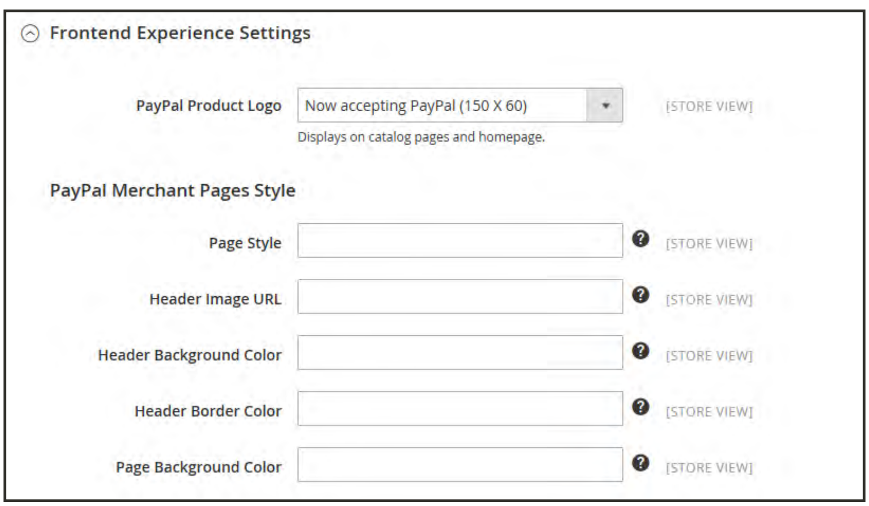
paypal	Uses the PayPal page style.
primary	Uses the page style that you identified as the "primary" style in your account profile.
your_custom_value	Uses a custom payment page style, which is specified in your account profile.

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.

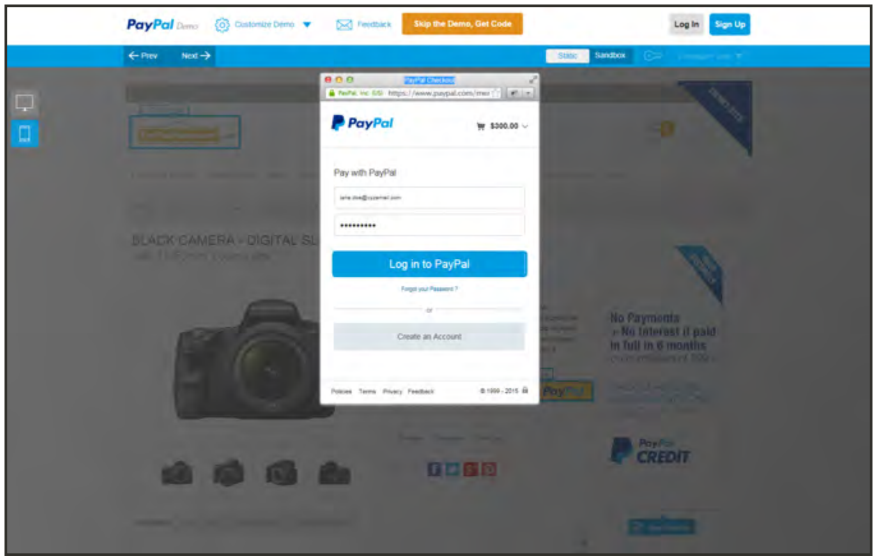


Frontend Experience Settings

3. When complete, tap **Save Config**.

PayPal In-Context Checkout

PayPal's In-Context Checkout makes it easier than ever to pay online. Customers never lose sight of your store during this simplified one- or two-click seamless checkout. In-Context Checkout works equally well on Macs and PCs, and offers a consistent experience on desktop computers, tablets, and mobile devices. To learn more, see: In-Context Checkout in Express Checkout.

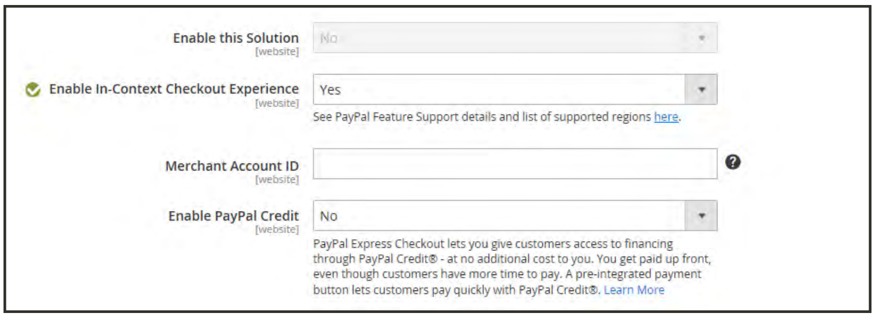


PayPal In-Context Checkout Demo

To configure In-Context Checkout:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. In the **PayPal Express Checkout** section, tap **Configure**. Then, do the following:
   a. In the **Required PayPal Settings** section, set **Enable In-Context Checkout Experience** to "Yes."
   b. Enter your PayPal **Merchant Account ID**.

   Your Merchant Account ID is in your PayPal business account profile.



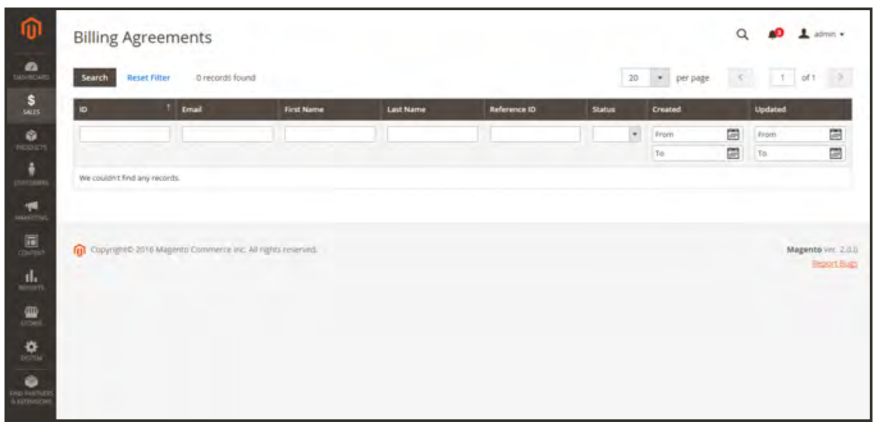
Enable PayPal In-Context Checkout

4. When complete, tap **Save Config**.

PayPal Billing Agreements

To simplify the checkout process, customers can enter into a billing agreement with PayPal, as the payment service provider. During checkout, the customer chooses the billing agreement as the payment method. The payment system verifies the billing agreement by its unique number, and charges the customer's account. With a billing agreement in place, it is no longer necessary for the customer to enter payment information for each purchase. Customers can manage their billing agreements from the dashboard of their customer account, where the status of each is shown as “Active” or “Canceled.” When a billing agreement is canceled, it cannot be reactivated.

The Billing Agreements grid lists all billing agreements between your store and its customers. The store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. Each record includes general information about the billing agreement, and all sales orders that have used it as a payment method. The store administrator can view, cancel, or delete customer’s billing agreements. A canceled billing agreement can be deleted only by the store administrator.



Billing Agreements

Billing Agreement Workflow

1 **Customer signs up for a billing agreement.** After a billing agreement is in place, additional billing agreements can be added only from the customer account. There is no limit to the number of billing agreements a customer can create. Customers can use any of the following methods to sign up for billing agreements:

- **Sign up in customer account.** Customers can sign up for a billing agreement from their customer accounts.
- **Sign up at checkout.** Customers who pay for a purchase with PayPal Express Checkout can mark a checkbox to create a billing agreement. Although the billing agreement is not used for the current order, it becomes available as a payment method option the next time the customer places an order.
- **Sign up by store administrator.** On a customer’s request, the store administrator can create a sales order using the customer’s billing agreement.

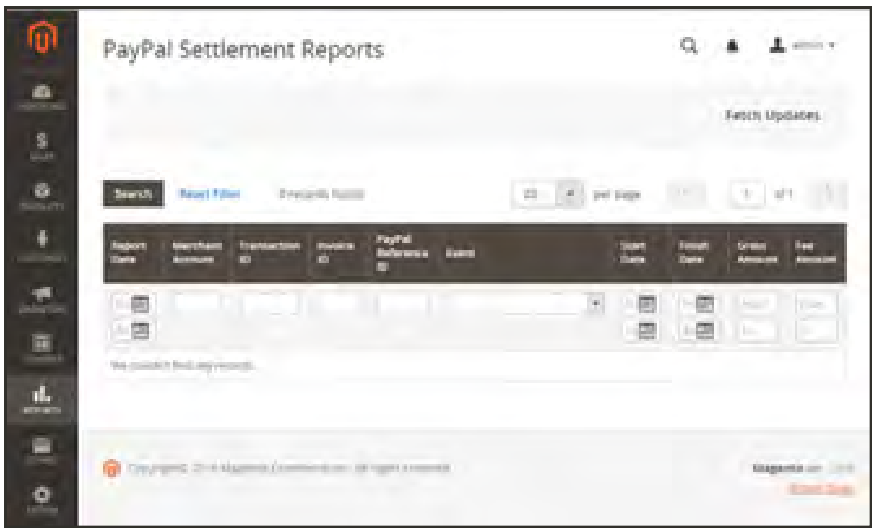
2 **PayPal Verifies and Records Agreement.** When the customer places the order with payment by billing agreement, the billing agreement reference ID and sales order payment details are transferred to PayPal, and recorded in the customer account, along with reference information. If the payment is authorized, an order is created in Magento.The billing agreement reference ID is sent to the customer and to the store.

PayPal Settlement Reports

The PayPal Settlement report provides the store administrator with the information about each transaction that affects the settlement of funds.

> Before generating settlement reports, the store administrator must request PayPal Merchant Technical Services to create an SFTP user account, enable settlement reports generation, and enable SFTP in their PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports during the following twenty-four hours. The list of available settlement reports can be viewed from the Admin.



To view settlement reports:

1. On the Admin sidebar, tap **Reports**. Then under **Sales**, choose select **PayPal Settlement.**

2. For the most recent updates, tap **Fetch Updates** in the upper-right corner.

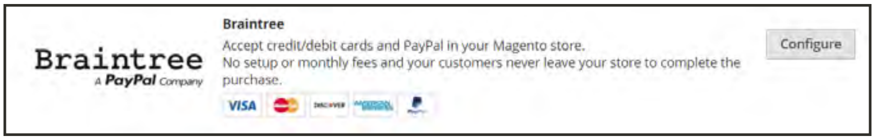
   The system connects to the PayPal SFTP server to fetch the reports. When the process is complete, a message appears with the number of reports fetched. The report includes the following information for each transaction:

Field Descriptions

FIELD	DESCRIPTION	
PayPal Reference ID Type	One of the following reference codes: Order ID Transaction ID Subscription ID	
Preapproved Payment ID	Options include:	
	Custom	The text entered by the merchant on the transaction in PayPal.
	Transaction Debit or Credit	The direction of money movement of gross amount.
	Fee Debit or Credit	The direction of money movement for fee.

Braintree

Braintree offers a fully customizable checkout experience with fraud detection and PayPal integration. Braintree reduces the PCI compliance burden for merchants because the transaction takes place on the Braintree system.



Configure Braintree

Setting Up Braintree

Process Overview:

Step 1: Get Your Braintree Credentials

Step 2: Complete the Basic Settings

Step 3: Complete the Advanced Settings

Step 4: Complete the Country-Specific Settings

Step 5: Complete the PayPal through Braintree Settings

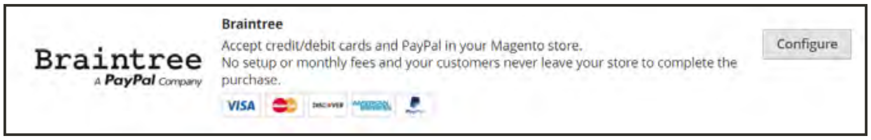
Step 6: Complete the 3D Verification Settings

Step 1: Get Your Braintree Credentials

Visit Braintree Payments and sign up for an account.

Step 2: Complete the Basic Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
   - If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
   - In the **Merchant Location** section, verify that **Merchant Country** is set to the location of your business.
3. Under Recommended Solutions, in the **Braintree** section, tap **Configure**. Then, do the following:



Configure Braintree

a. Enter a **Title** to identify Braintree as a payment option during checkout.

b. Set the current operating **Environment** for Braintree transactions to one of the following:

- Sandbox
- Production

When testing the configuration in a sandbox, use only credit card numbers that are recommended by Braintree. When you are ready to go live with Braintree, set **Environment** to "Production."

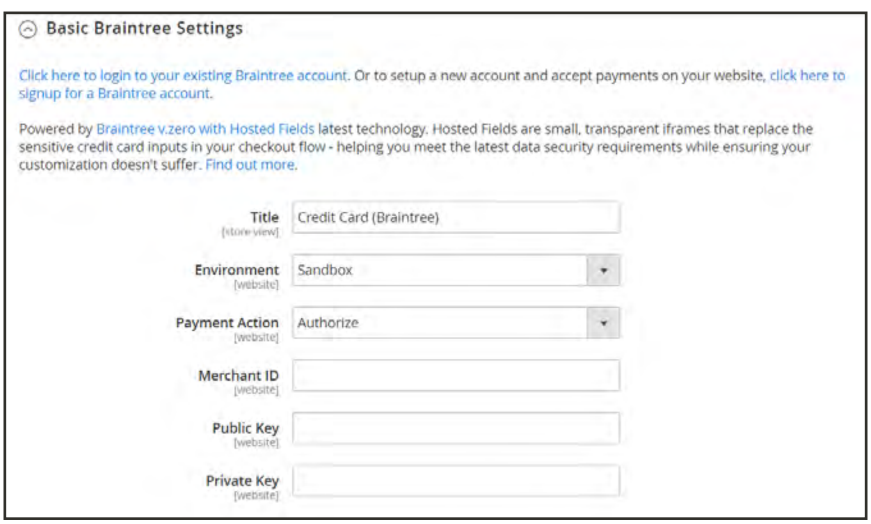
c. Set **Payment Action** to one of the following:

Authorize Only	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

d. Enter the **Merchant ID** from your Braintree account.

e. Enter the following credentials from your Braintree account:

- Public Key
- Private Key

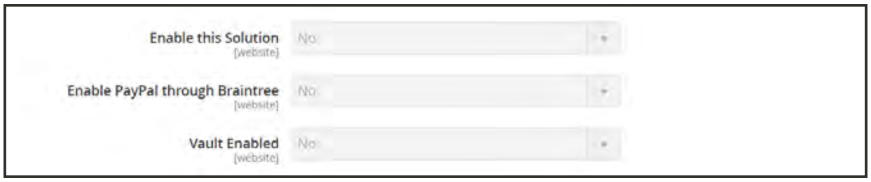


Basic Settings

4. Set **Enable this Solution** to “Yes.”

5. To include PayPal as a payment option with Braintree, set **Enable PayPal through Braintree** to “Yes.”

6. If you want the ability to store customer information securely, so customers don't have to reenter it each time they make a purchase, set **Vault Enabled** to “Yes.”



Basic Settings

Step 3: Complete the Advanced Settings

1. Expand the **Advanced Braintree Settings** section.

2. In the **Vault Title** field, enter a descriptive title for your reference that identifies the vault where your customer card information is stored.

3. Enter the **Merchant ID** from your Braintree account.

4. To use Braintree fraud protection for all transactions, set **Advanced Fraud Protection** to “Yes.”

   Make sure that Advanced Fraud Protection is enabled in the Settings/Protection section of your account.

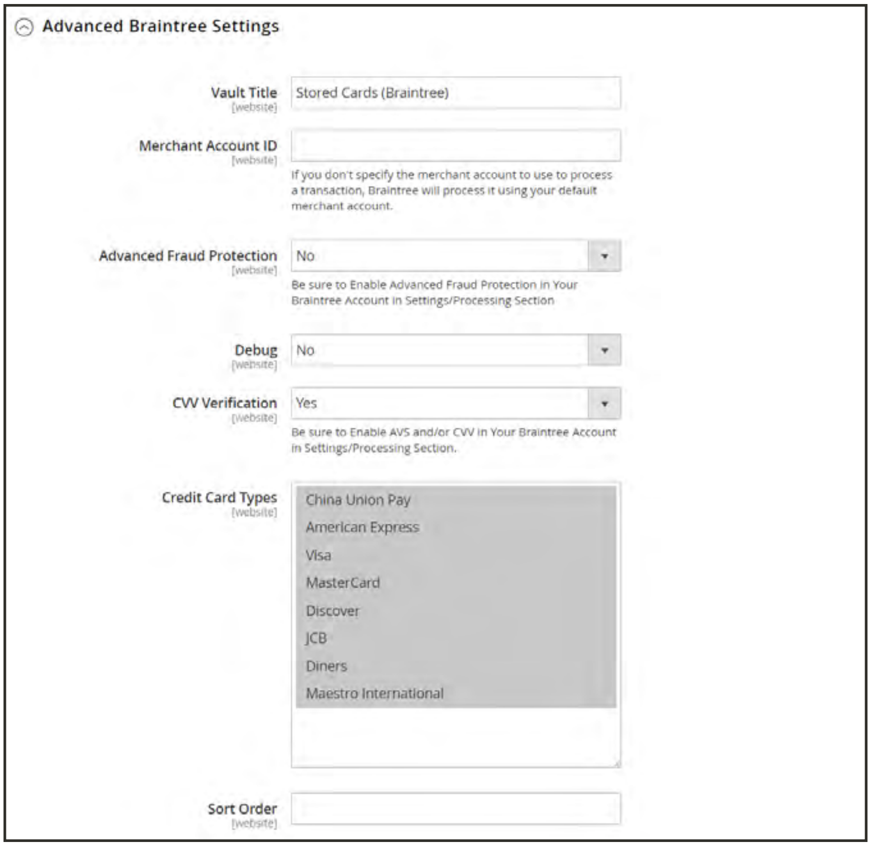
5. If you want the system to save a log file of interactions between your store and Braintree, set **Debug** to “Yes.”

6. To require customers to provide the three-digit security code from the back of a credit card, set **CVV Verification** to “Yes.”

   If using CVV verification, make sure to enable AVS and/or CVV in the Settings/Processing section of your Braintree account.

7. In the **Credit Card Types** box, hold down the Ctrl key and select each credit card that is accepted by your store as payment through Braintree.

8. In the **Sort Order** field, enter a number to determine the sequence in which Braintree appears when listed with other payment methods during checkout.



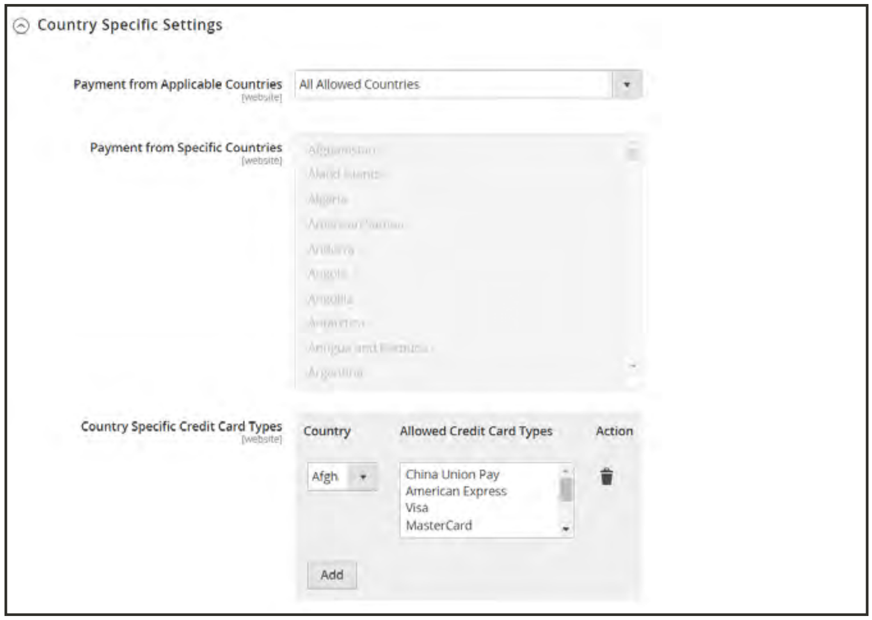
Advanced Settings

Step 4: Complete the Country Specific Settings

1. Set **Payment from Applicable Countries** to one of the following:

   - All Allowed Countries
   - Specific Countries

   For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.



Country-Specific Settings

2. To set up **Country Specific Credit Card Types**, do the following:

   a. Tap **Add**.

   b. Set the **Country**, and choose each **Allowed Credit Card Type**.

   c. Repeat to identify the credit cards that are accepted from each country.

Step 5: Complete the PayPal through Braintree Settings

1. Do the following to identify your PayPal through Braintree configuration:

   a. Enter a **Title** to identify Braintree's payment by PayPal option during checkout.

   b. In the **Vault Title** field, enter a descriptive title to identify the vault where your customer card information is to be stored.

   c. In the **Sort Order** field, enter a number to determine the sequence in which Braintree's PayPal payment option appears when listed with other payment options during checkout.

   d. To display your merchant name differently than what is defined in your store configuration, enter the name as you want it to appear in the **Override Merchant Name** field.

2. Set **Payment Action** to one of the following:

Authorize	Approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
Authorize and Capture	The amount of the purchase is authorized and immediately withdrawn from the customer's account.

3. Set **Payment from Applicable Countries** to one of the following for Braintree transactions processed by PayPal:

   - All Allowed Countries
   - Specific Countries

   For **Payment from Specific Countries**, hold down the Ctrl key and select each country from which you accept payment.

4. To require that customers provide a billing address, set **Require Customer's Billing Address** to "Yes."

   > This feature must first be enabled for your account by PayPal Technical Support.

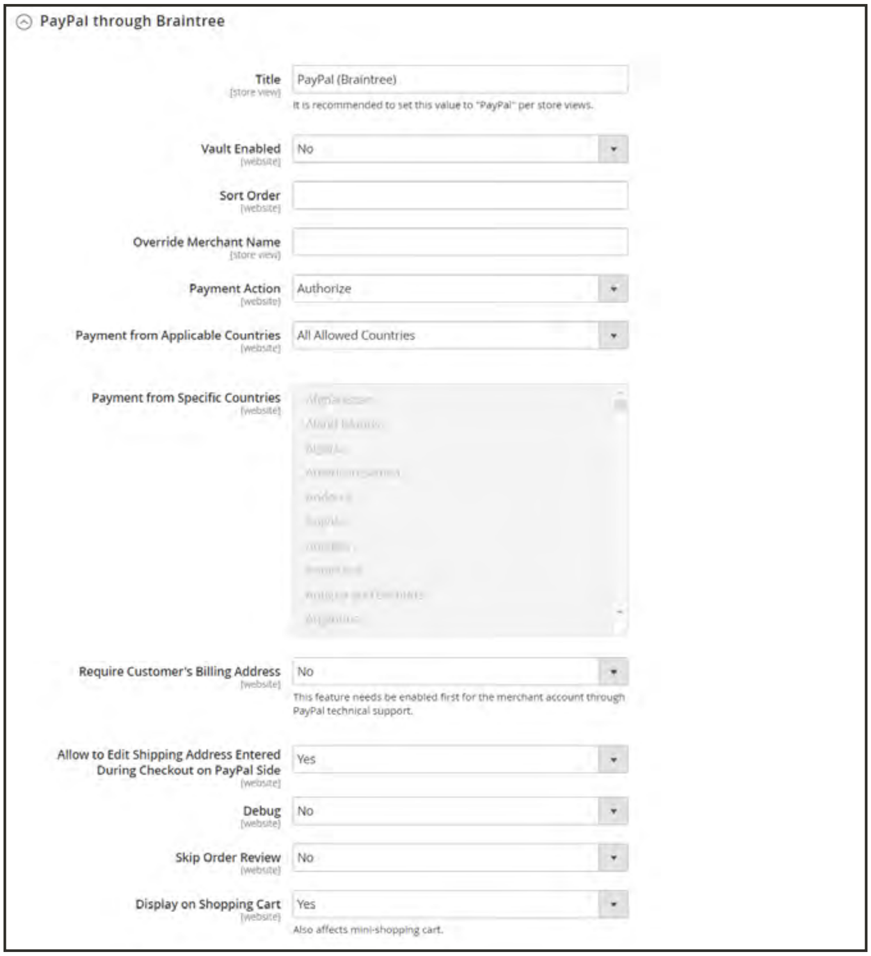
5. If you want customers to be able to edit the shipping address while completing a PayPal transaction, set **Allow to Edit Shipping Address Entered During Checkout on PayPal Side** to "Yes."

6. To save a log file of interactions between your store and PayPal through Braintree, set **Debug** to "Yes."

7. If you want to bypass the Order Review step before the order is submitted, set **Skip Order Review** to "Yes."

   By default, Order Review is the last stage of the checkout process.

8. To display the PayPal button on both the mini shopping cart and shopping cart page, set **Display on Shopping Cart** to "Yes."



PayPal through Braintree Settings

Step 6: Complete the 3D Verification Settings

1. If you want to add a verification step for customers using credit cards that are enrolled in a verification program such as "Verified by VISA," set **3d Secure Verification** to "Yes."

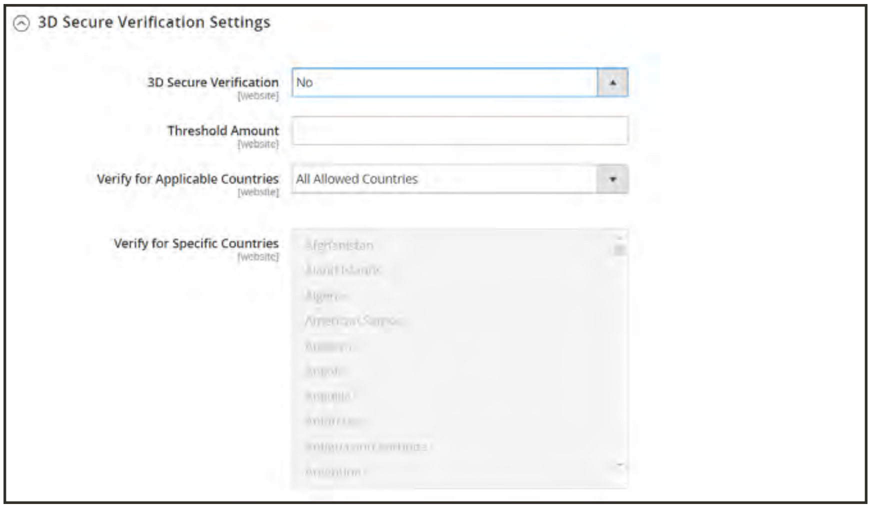
   During the process, the transaction amount that is submitted for verification is checked against the amount that is sent for authorization,

2. In the **Threshold Amount** field, enter the minimum order amount that is required to trigger 3D verification.

3. Set **Verify for Applicable Countries** to one of the following:

   - All Allowed Countries
   - Specific Countries

   To **Verify for Specific Countries**, hold down the Ctrl key and select each country from which payments are to be verified.



3D Verification Settings

Step 7: Dynamic Descriptors

The following descriptors are used to identify purchases on customer credit card statements. You can reduce the number of chargebacks by clearly identifying the company that is associated with each purchase. If Dynamic Descriptors are not enabled for your account, contact Braintree support.

1. Enter the Dynamic Descriptor for the **Name**, **Phone**, and **URL** according to these guidelines:

Name	There are two parts to the Name descriptor, which are separated by an asterisk (*). For example: `company*myproduct` The first part of the descriptor identifies the company or DBA, and the second part identifies the product. The length of the Company and Product parts of the descriptor can be allocated in the following ways, for a combined length of up to twenty-two characters.

Characters in Name Descriptor

	Company	Product
Option 1	Must be 3 characters	Up to 18 characters
Option 2	Must be 7 characters	Up to 14 characters
Option 3	Must be 12 characters	Up to 9 characters

Phone	The Phone descriptor must be ten to fourteen characters in length, and can include only numbers, dashes, parentheses, and periods. For example:
	`9999999999`
	`(999) 999-9999`
	`999.999.9999`

URL	The URL descriptor represents your domain name, and can be up to thirteen characters long. For example: `company.com`

2. When your Braintree configuration is complete, tap **Save Config**.

Other PayPal Solutions

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Commerce, you can accept payments from all major debit and credit cards. PayPal offers additional convenience without extra effort, because even your customers who don't have a PayPal account can pay for their purchases with PayPal. In this guide, PayPal payments solutions are organized as follows:

- Recommended Solutions
- PayPal All-In-One Payment Solutions
- PayPal Payment Gateways

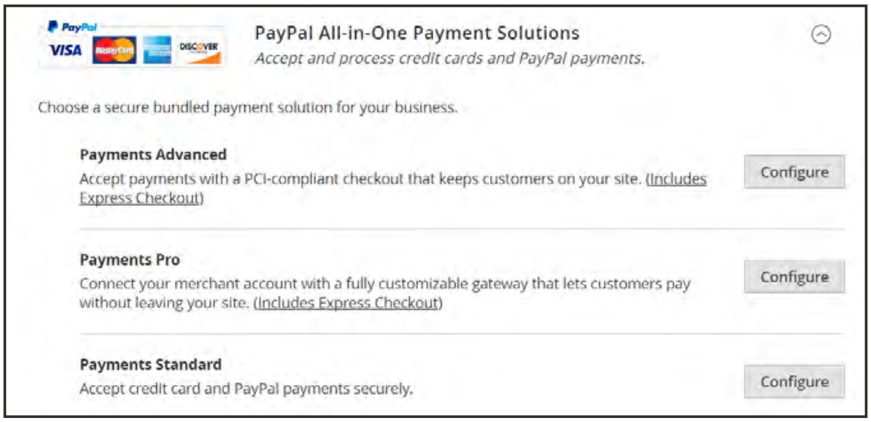
The selection of available PayPal solutions varies by merchant location. PayPal Express Checkout and PayPal Payments Standard can be used in all parts of the world. To learn more, see: PayPal Solutions by Country.

> You cannot have more than one PayPal method enabled at a time, with the exception of PayPal Express Checkout. PayPal Express Checkout can be used in combination with other PayPal payment methods. except for PayPal Payments Standard. If you change payment solutions, the one used previously is disabled.

PayPal All-In-One Payment Solutions

In the United States, PayPal offers the following PCI-compliant solutions to meet the needs of your growing business.

- PayPal Payments Advanced
- PayPal Payments Pro
- PayPal Payments Standard

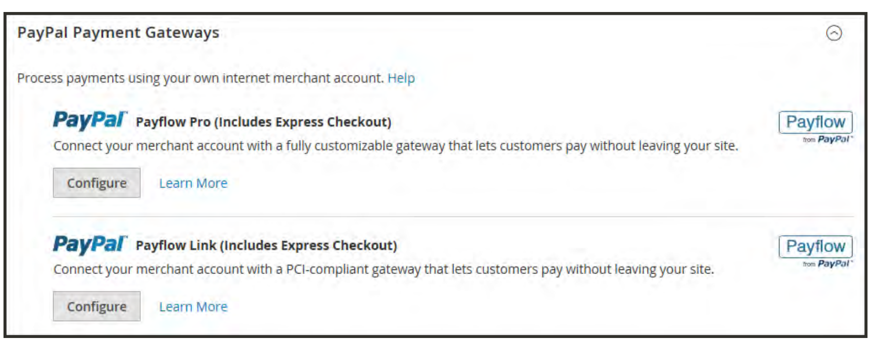


PayPal All-In-Payment Solutions

PayPal Payment Gateways

PayPal offers a choice of two payment gateway solutions for your business. You can let PayPal host your checkout on its secure payment site, or you can take control of the entire payment experience with a completely customizable solution.

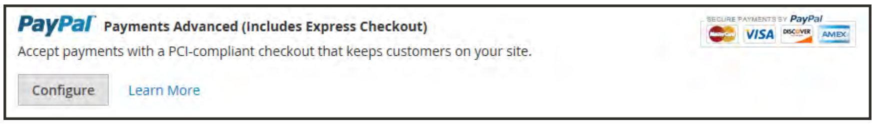
- PayPal Payflow Pro
- PayPal Payflow Link



PayPal Payment Gateways

PayPal Payments Advanced

PayPal Payments Advanced is a PCI-compliant solution that lets your customers pay by debit or credit card without leaving your site. It includes an embedded checkout page that can be customized to create a seamless and secure checkout experience.



PayPal Payments Advanced

Even customers without a PayPal account can make purchases through PayPal's secure payment gateway. Accepted cards include Visa, MasterCard, Switch/Maestro, and Solo credit cards in the United States and United Kingdom. For additional convenience, PayPal Express Checkout is included with PayPal Payments Advanced.

You can have two PayPal solutions active at the same time: Express Checkout, plus any All-In-One or Payment Gateway solution. If you change payment solutions, the one that was used previously is disabled.

PayPal Payments Advanced cannot be used for orders created from the Admin of your store.

Requirements

- PayPal Business Account
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Checkout Workflow

1 **Customer Chooses Payment Method.** During checkout, the customer chooses to pay with PayPal Payments Advanced. The Pay Now button appears instead of the Place Order button.

2 **Pay Now.** The customer taps Pay Now, and a PayPal-hosted form appears. The customer enters the card information, and the card is verified. If successful, the order confirmation page appears.

Pay with PayPal. The form also includes the Pay with PayPal button, which redirects the customer to the PayPal site, where payment can be made with PayPal Express Checkout.

3 **Troubleshooting.** If the transaction fails for any reason, an error message appears on the checkout page and the customer is instructed to try again. Any issues are managed by PayPal.

Order Processing Workflow

Processing orders with PayPal Payments Advanced is the same as for any regular PayPal order. Orders are invoiced and shipped, and credit memos generated for both online and offline refunds. However, multiple online refunds are not available for orders paid with PayPal Payments Advanced.

1 **Customer Places Order.** In the final stage of checkout, the customer taps the Place Order button.

2 **PayPal Responds.** PayPal evaluates the request. If found to be valid, PayPal processes the transaction.

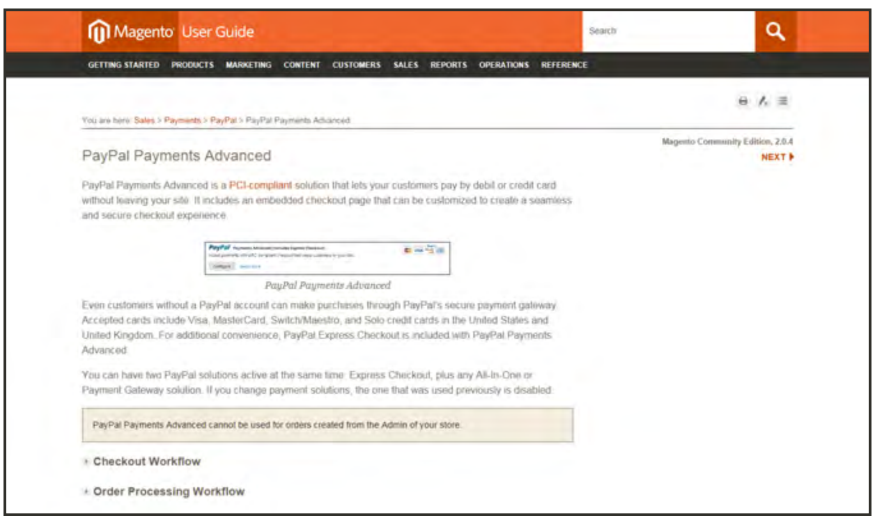
3 **Magento Sets Order Status.** Magento receives response from PayPal, and sets the order status to one of the following:

Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the PayPal fraud filters. The system receives the response from PayPal that the transaction is under review by Fraud Service.

4 **Merchant Fulfills Order.** The merchant invoices and ships the order.

Setting Up PayPal Payments Advanced

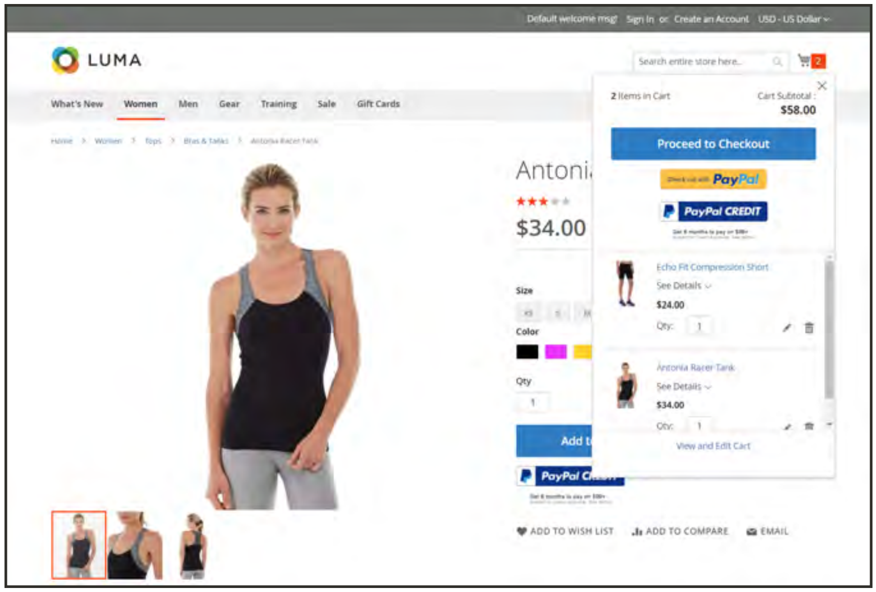
For step-by-step configuration instructions, see PayPal Payments Advanced in the Magento Commerceonline user guide.



Setting Up PayPal Payments Advanced

PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience. PayPal Express Checkout is automatically enabled with PayPal Payments Pro, so you can tap into more than 110 million active PayPal users.



PayPal Payments Pro

> For merchants outside the US, this method is called "PayPal Website Payments Pro."

You can have two PayPal solutions active at the same time: PayPal Express Checkout, plus any one of the All-In-One solutions. If you change payment solutions, the one used previously is automatically disabled.

Requirements

- PayPal Merchant Account (with Direct Payments Activated)

Checkout Workflow

1. **Customer Goes to Checkout.** Customer adds products to cart, and taps Proceed to Checkout.

2. **Customer Chooses Payment Method.** During checkout, customer chooses the PayPal Direct Payment option, and enters the credit card information.

   - If paying with PayPal Payments Pro, the customer stays on your site during the checkout process.
   - If paying with PayPal Express Checkout, the customer is redirected to the PayPal site to complete the transaction.

   At the customer's request, the store administrator can also create an order from the Admin, and process the transaction with PayPal Payments Pro.

Order Processing Workflow

1 **Order Placed.** The order can be processed either the Admin of your store, or from your PayPal merchant account.

2 **Payment Action.** The payment action specified in the configuration is applied to the order. Options include:

Authorize	Magento creates a sales order with the "Processing" status. In this case, the amount of money to be authorized is pending approval.
Sale	Magento creates both a sales order and invoice.
Capture	PayPal transfers the order amount from the buyer's balance, bank account or credit card to the merchant's account.

3 **Invoicing.** An invoice is created in Magento after PayPal sends an instant payment notification message to Magento.

> Make sure that instant payment notifications are enabled in your PayPal merchant account.

If required, an order can be partially invoiced for a specified quantity of products. For each partial invoice submitted, a separate Capture transaction with a unique ID becomes available, and a separate invoice is generated.

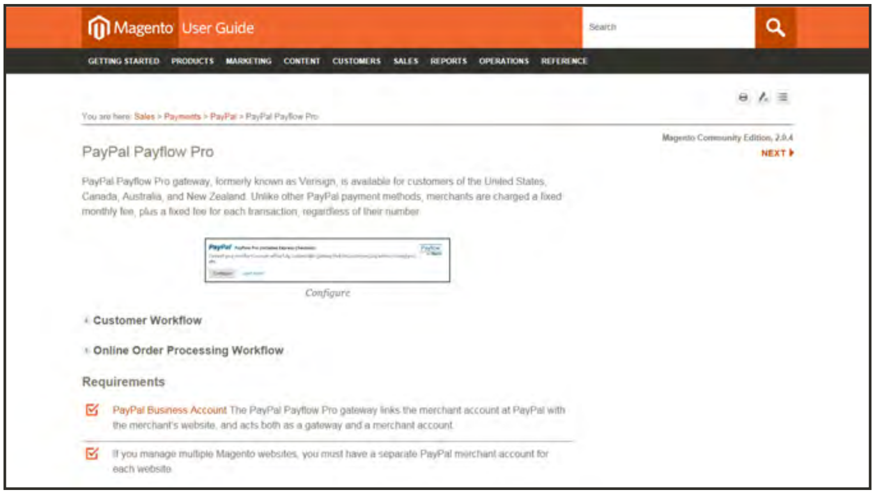
Authorization-only payment transactions are closed only after the full order amount is captured.

An order can be voided online at any time until the order amount is fully invoiced.

4 **Returns.** If for any reason the customer returns the purchased products and claims a refund, as with order amount capturing and invoice creation, you can create an online refund either from the Admin or from your PayPal merchant account.

Setting Up PayPal Payments Pro

For step-by-step configuration instructions, see PayPal Payments Pro in the Magento Commerce online user guide.



Setting Up PayPal Payment Pro

PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment both by credit card and PayPal by simply adding a checkout button to your store.

PayPal Payments Standard

For merchants outside the US, this method is called “PayPal Website Payments Standard.”

With PayPal Payments Standard, you can swipe credit cards on mobile devices. There is no monthly fee, and you can get paid on eBay. Supported credit cards include Visa, MasterCard, Discover, and American Express. In addition, customers can pay directly from their personal PayPal accounts. PayPal Payments Standard is available in all countries on the PayPal worldwide reference list.

Merchant Requirements

PayPal Business Account

Checkout Workflow

For customers, PayPal Payments Standard is a one-step process if the credit card information the their personal PayPal accounts is up to date.

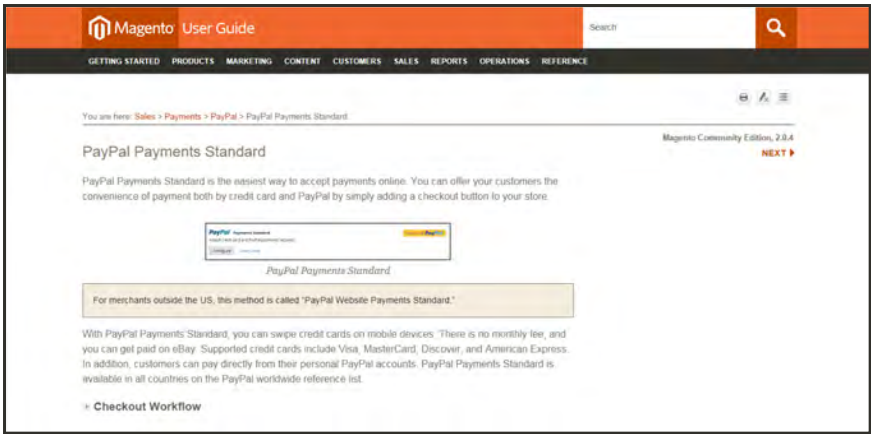
1. **Customer Places Order.** The customer taps the “Pay Now” button to complete the purchase.

2. **PayPal Processes the Transaction.** The customer is redirected to the PayPal site to complete the transaction.

Setting Up PayPal Payments Standard

PayPal Payments Standard cannot be used simultaneously with any other PayPal method, including Express Checkout. If you change payment solutions, the one used previously is disabled.

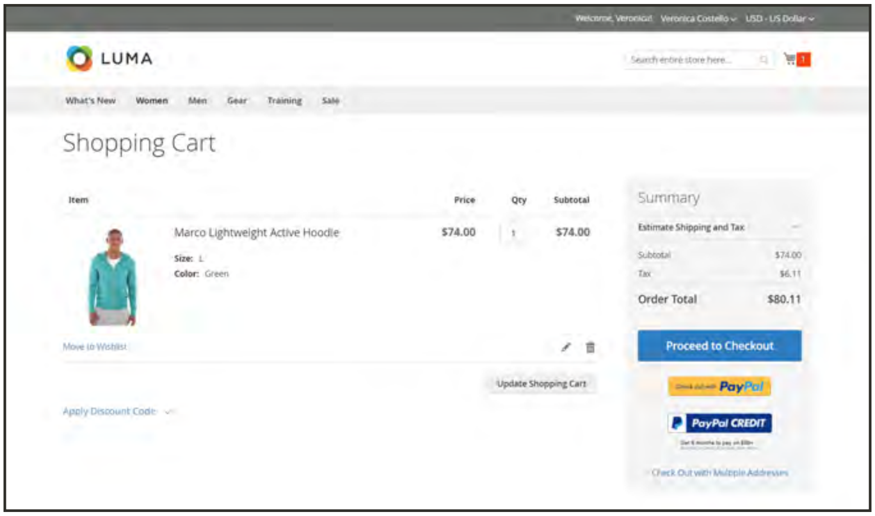
For step-by-step configuration instructions, see PayPal Payments Standard in the online user guide.



Setting Up PayPal Payments Standard

PayPal Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is available for customers of the United States, Canada, Australia, and New Zealand. Unlike other PayPal payment methods, merchants are charged a fixed monthly fee, plus a fixed fee for each transaction, regardless of their number.



Checkout with PayPal

Requirements

- **PayPal Business Account**

  The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.

- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Customer Workflow

1 **Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow Pro, and enters the credit card information.

Customers are not required to have personal PayPal accounts. However, depending on the merchant country, customers can also use their personal PayPal account to pay for the order.

2 **Customer Submits Order.** The customer submits the order, and the order information is sent to PayPal for processing. The customer does not leave the checkout page of your site.

3 **PayPal Completes the Transaction.** Payments are accepted at the time the order is placed. Depending on the payment action specified n the configuration, either a sales order or a sales order and an invoice is created.

Online Order Processing Workflow

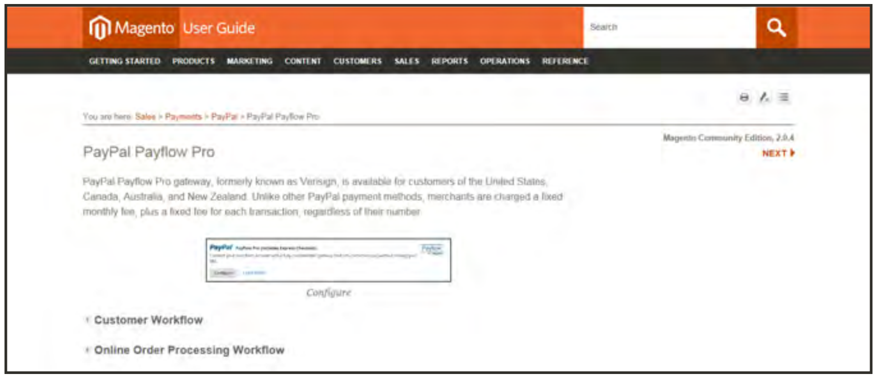
1 **Administrator Submits Online Invoice.** The store administrator submits an online invoice. and as a result a corresponding transaction and an invoice is created.

2 **PayPal Receives the Transaction.** The order information is sent to PayPal. A record of the transaction and an invoice is generated. You can view all Payflow Pro Gateway transactions in your PayPal merchant account.

> Partial invoices and partial refunds are not supported by PayPal Payflow Pro.

Setting Up PayPal Payflow Pro

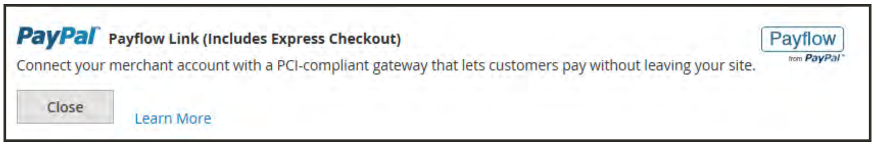
For step-by-step configuration instructions, see PayPal Payflow Pro in the Magento Commerceonline user guide.



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 their credit card information in a form that is hosted by PayPal. The information is never stored on your Magento server. PayFlow Link cannot be used for orders that are created from the Admin.



Configure

Credit memos are supported for both online and offline refunds. However, multiple online refunds are not supported.

Requirements

- PayPal Business Account
  The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.
- If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Customer Workflow

1. **Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow link, and enters the credit card information.
   The customer is not required to have a personal PayPal account.
2. **Customer Chooses Pay Now.** The customer taps the Pay Now button to submit the order.
3. **Customer Enters Credit Card Info.** The customer enters the credit card information on a form that is hosted by PayPal/
   If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to "Canceled."
4. **Customer Submits the Order.** The credit card information is submitted directly to PayPal, and is not retained anywhere on the Magento site.

Order Workflow

1 **PayPal Receives Request.** PayPal receives the request from the customer to Pay Now.

2 **PayPal Verifies the Payment Information.** PayPal verifies the credit card information, and assigns the appropriate status.

Payment Verified: If verified, the "Pending Payment" the applicable status is initially assigned to the order until the transaction is settled.

Processing	The transaction was successful.
Pending Payment	The system did not receive any response from PayPal.
Canceled	The transaction was not successful for some reason.
Suspected Fraud	The transaction did not pass some of the PayPal fraud filters. The system receives the response from PayPal that the transaction is under review by Fraud Service.

Cancel Payment. If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to "Canceled."

3 **Customer Is Redirected to Confirmation Page.** If the transaction completes successfully, the customer is redirected to the order confirmation page in your store.

If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are managed by PayPal.

4 **Merchant Fulfills Order.** The merchant invoices, and ships the order as usual.

Setting Up PayPal Payflow Link

For step-by-step configuration instructions, see PayPal Payflow Link in the Magento Commerceonline user guide.

PayPal Payflow Link Setup

PayPal Reference

PAYPAL SOLUTION	DESCRIPTION
EXPRESS CHECKOUT	
PayPal Express Checkout	During checkout, the customer is redirected to the secure PayPal site to complete the payment information.
ALL-IN-ONE SOLUTIONS	
PayPal Payments Advanced (Includes Express Checkout)	Allows you to accept payments with a PCI-compliant checkout that keeps customers on your site.
PayPal Payments Pro (Includes Express Checkout) PayPal Website Payments Pro (Outside US)	Allows you to accept payments with a completely customizable checkout.
PayPal Payments Standard (Includes Express Checkout) PayPal Website Payments Standard (Outside US)	Adds PayPal as an additional payment method to your checkout page.
PAYMENT GATEWAYS	
PayPal Payflow Pro (Includes Express Checkout)	Connects your merchant account with a fully customizable gateway that lets customers pay without leaving your site.
PayPal Payflow Link (Includes Express Checkout)	Connects your merchant account with a PCI-compliant gateway that lets customers pay without leaving your site.
OTHER PAYPAL SOLUTIONS	
PayPal Integral Evolution PayPal Pasarela Integral PayPal Pro PayPal Website Payments Plus PayPal Website Payments Pro Hosted Solution PayPal Payments Pro Hosted Solution (includes Express Checkout)	

PayPal Business Account

To offer PayPal as a payment method in your store, you must have a PayPal business account and/or a PayPal Payflow account. The account requirements are specified in the description of each PayPal solution. Your PayPal merchant account is also used to manage any fraud filters that are applied to purchases made from your store.

Customers who use PayPal Express Checkout or Express Checkout for Payflow Pro must have a PayPal buyer account. PayPal Payments Standard (which is some countries is called Website Payments Standard) can be used directly or through a buyer account, provided that the merchant enables PayPal Account Optional. By default, this parameter is enabled. Customers can choose to enter their credit card information, or create a buyer account with PayPal. When disabled, customers must first create a PayPal buyer account before making a purchase.

Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require customers to enter credit card information during checkout.

PayPal Credit®

PayPal Credit offers your customers quick access to financing, so they can buy now and pay over time, at no additional cost to you. You are not charged when customers choose PayPal Credit, and pay only your normal PayPal transaction fee.

> On July 2, 2018, Synchrony Bank becomes the issuing bank for PayPal Credit — a change that brings a significant expansion of available offerings. To learn more, see: PayPal Credit: The shortest distance between you and higher sales.

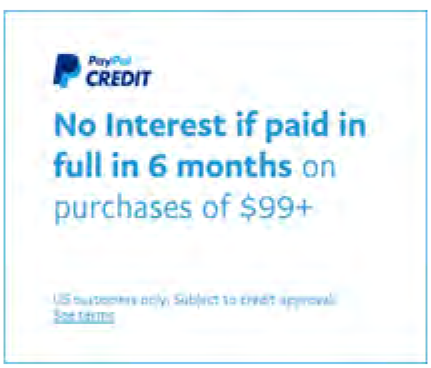
According to a recent study, nearly 40% of PayPal Credit users say they spent more online because financing was available. Plus, their transactions are up to 68% larger than credit/debit purchases.[1] To learn more, see PayPal Credit on the PayPal website.

Give your sales a boost when you advertise financing. PayPal helps turn browsers into buyers with financing with PayPal Credit®. Your customers can pay over time, while you get paid up front – at no additional cost to you. Use PayPal's free banner ads that let you advertise PayPal Credit® financing as a payment option when your customers check out with PayPal. The PayPal Advertising Program has been shown to generate additional purchases as well as increase consumer's average purchase sizes by 15% or more.

You can easily add free, ready-made banner ads to pages of your stie, and the PayPal Credit button to your shopping cart during checkout to remind your customers that financing is readily available.

PayPal Credit Button

Add a PayPal Credit button to your cart to make it easier for your customers to make a purchase.



PayPal Credit Banners

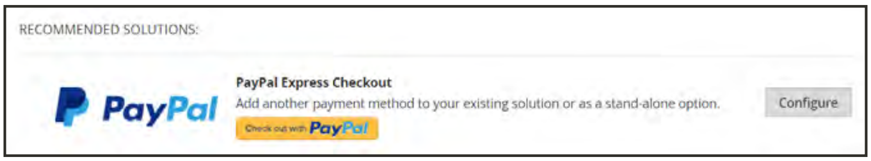
Use banners on your home page, product pages, and shopping cart to turn "window shoppers" into buyers.

For US merchants, PayPal Credit is included as a PayPal Express Checkout option, and is available with PayPal All-In-One Solutions (Payment Advanced, Payments Pro, and Payments Standard) and PayPal Payment Gateways (PayFlow Pro and PayFlow Link). Before you configure PayPal Credit for your Magento store, make sure it is enabled in your PayPal account.

To enable PayPal Credit:

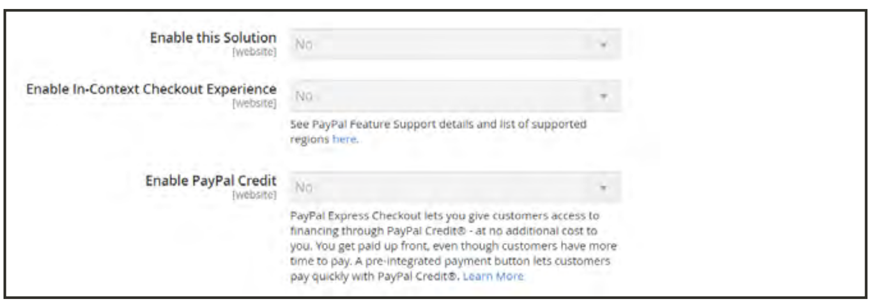
Give your customers access to financing with PayPal Credit®, at no additional cost to you. You get paid up front, even though customers can pay over time. A pre-integrated payment button lets customers pay quickly with PayPal Credit®.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. For any of the following **Recommended Solutions**, tap **Configure**.
   - PayPal Express Checkout
   - Any PayPal All-In-One Solution with PayPal Express Checkout



PayPal Express Checkout

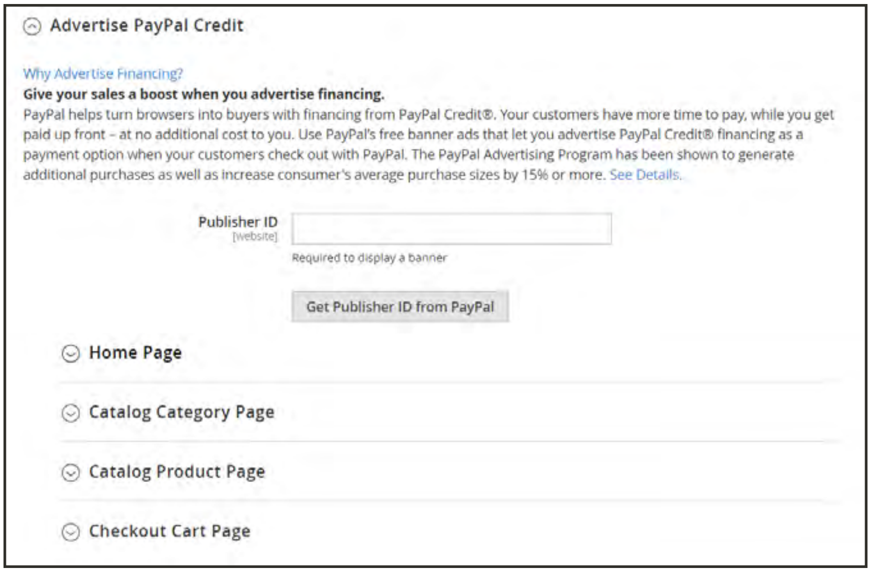
4. Complete the **Required PayPal Settings**. Then, expand **Advertise PayPal Credit**.
5. Set **Enable PayPal Credit** to “Yes”.
6. Tap **Save Config**.



Enable PayPal Credit

To enable PayPal Credit banners:

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. For any of the following **Recommended Solutions**, tap **Configure**.
   - PayPal Express Checkout
   - Any PayPal All-In-One Solution with PayPal Express Checkout
4. Expand the **Required PayPal Settings** section. Then, expand the **Advertise PayPal Credit** section.



Advertise PayPal Credit

5. Click the **Get Publisher ID from PayPal** button and follow the directions to get your account information. Then, enter your **Publisher ID**.

6. Expand the **Home Page** section. Then, do the following:

   a. To place a banner on the page, set **Display** to "Yes".

   b. Set **Position** to one of the following:

      - Header (center)
      - Sidebar (right)

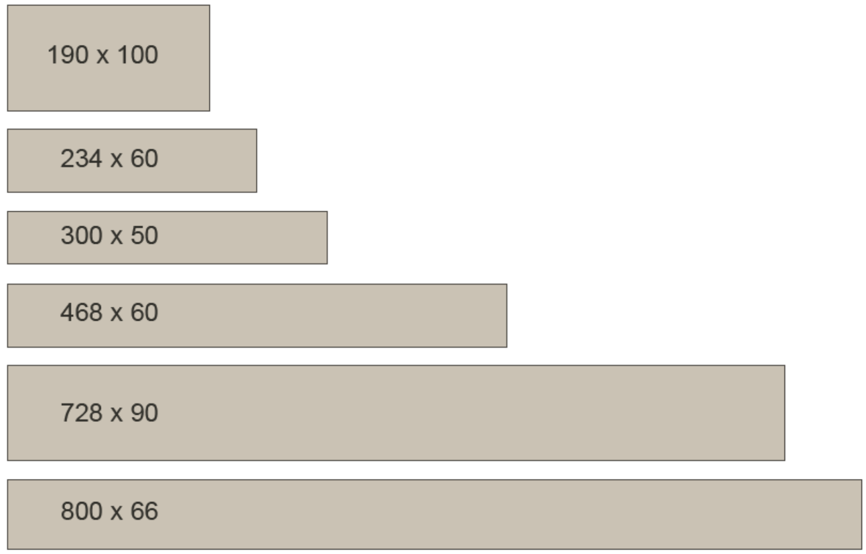
   c. Set **Size** to one of the following:

      - 190 x 100
      - 234 x 60
      - 300 x 50
      - 468 x 60
      - 728 x 90
      - 800 x 66

7. Repeat the previous step for each of the following sections:

   - Catalog Category Page
   - Catalog Product Page
   - Checkout Cart Page

8. When complete, tap **Save Config**.



Banner Sizes

These examples do not represent the actual size of the banners, but show their relative shape and proportion.

[1] As reported in Neilsen's PayPal Credit Average Order Value Study for activity occurring from April 2015 to March 2016 (small merchants) and October 2015 to March 2016 (midsize merchants), which compared PayPal Credit transactions to credit and debit card transactions on websites that offer PayPal Credit as a payment option or within the PayPal Wallet. Nielsen measured 284890 transactions across 27 mid and small merchants. Copyright Nielsen 2016.

PayPal Fraud Management Filter

PayPal fraud management filters make it easier to detect and respond to fraudulent transactions, and can be configured to flag, hold for review, or deny riskier payments. Magento order status values changed according to the fraud filter settings.

Filter Actions

ACTION	DESCRIPTION
Review	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 by Country

PayPal Payment Solutions

COUNTRY	PAYPAL PAYMENT SOLUTION
Australia	PayPal Website Payments Standard PayPal Payflow Pro PayPal Website Payments Pro Hosted Solution PayPal Express Checkout
Canada	PayPal Website Payments Standard PayPal Website Payments Pro PayPal Payflow Pro PayPal Payflow Link (includes Express Checkout) PayPal Express Checkout
France	PayPal Integral Evolution PayPal Website Payments Standard PayPal Express Checkout
Germany	PayPal Express Checkout
Hong Kong SAR China	PayPal Website Payments Pro Hosted Solution PayPal Website Payments Standard PayPal Express Checkout
Italy	PayPal Pro PayPal Payments Standard PayPal Express Checkout
Japan	PayPal Website Payments Plus PayPal Website Payments Standard PayPal Express Checkout
New Zealand	PayPal Payflow Pro PayPal Website Payments Standard PayPal Express Checkout
Spain	PayPal Pasarela Integral PayPal Website Payments Standard PayPal Express Checkout

PayPal Payment Solutions (cont.)

COUNTRY	PAYPAL PAYMENT SOLUTION
United Kingdom	PayPal Payments Pro Hosted Solution (includes Express Checkout) PayPal Payments Standard PayPal Express Checkout
United States	PayPal Payments Advanced (Includes Express Checkout) PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard+ PayPal Payflow Pro (Includes Express Checkout) PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout

OTHER COUNTRIES
PayPal Express Checkout and PayPal Website Payments Standard are available in the following countries:
Argentina, Austria, Belgium, Brazil, Bulgaria, Chile, Costa Rica, Cyprus, Czech Republic, Denmark. Dominican 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

CHAPTER 72:

Other Payment Methods

Magento Commerce supports the following payment solutions that offer merchant services in all parts of the world. Unlike some payment solutions that transfer control to another site to complete the transaction, a payment gateway makes it possible for you to accept credit card payments directly from your store without the customer leaving your site.

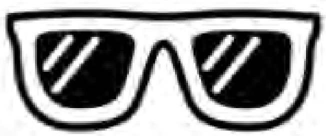
- Klarna
- Amazon Pay
- Authorize.Net Direct Post
- Cybersource
- eWAY
- Worldpay

Klarna

Klarna lets your customers choose how they want to pay, and supports the purchase with buyer protection and excellent customer service.

Pay Now

Customers can pay in full quickly and securely with Direct Bank Transfer/Direct Debit.



Pay Later

Customers can buy now, and pay later. You get paid immediately, and Klarna takes care of the rest.

Slice It

Customers can spread the cost of their purchases over time at a low interest rate. Klarna's credit application process takes less than thirty seconds to complete.

Klarna Customer Experience

Klarna appears as a payment method during checkout. if enabled in the configuration. If data sharing is used, Klarna can instantly prequalify the customer, and present the available solutions.

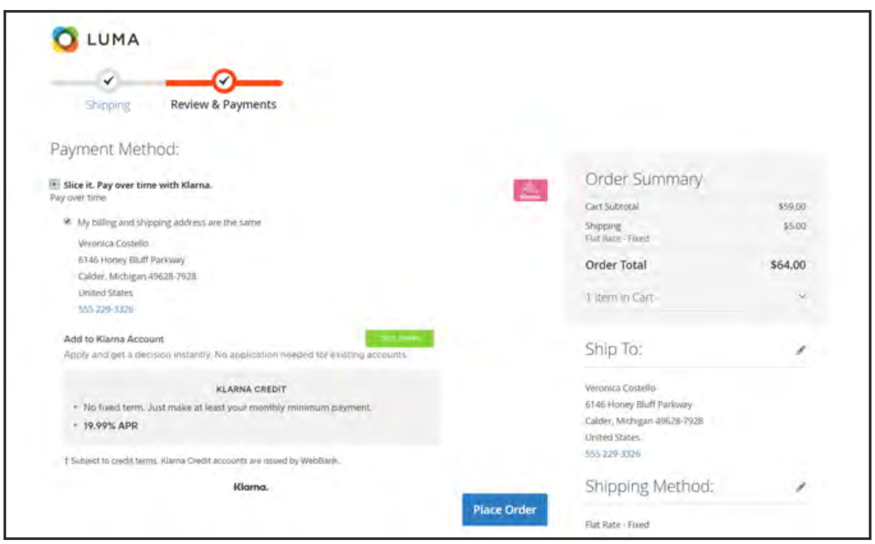
To pay with Klarna:

1. Select **Slice it. Pay over time with Klarna**.

Pay Over Time with Klarna

2. Do one of the following:

   - Add the purchase to your Klarna account.
   - Apply for Klarna credit, and receive an instant decision.

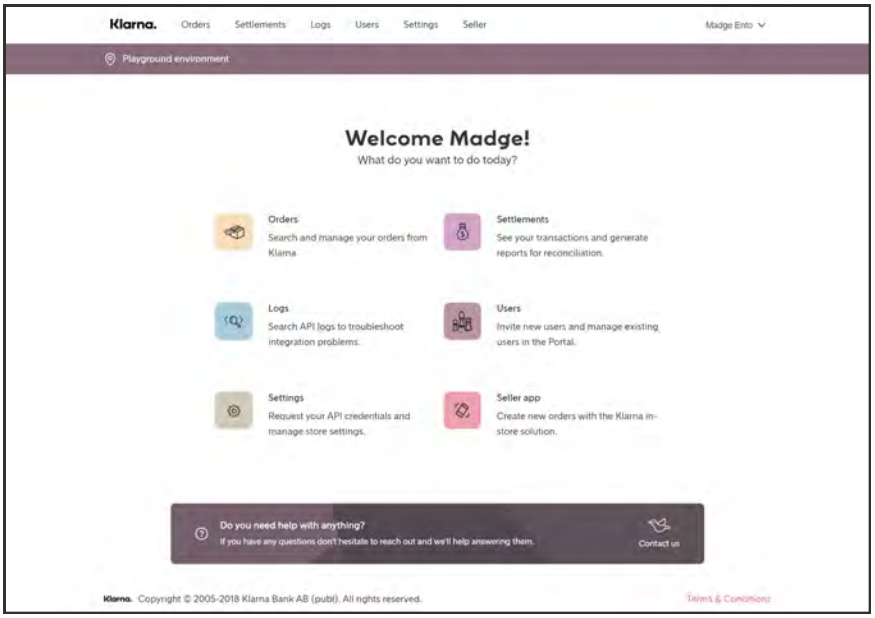


Klarna During Checkout

3. After the terms of the credit are approved, place your order.

Setting Up Klarna

To offer your customers the benefit of paying with Klarna, you must first sign up for a Klarna account and gain access to the Klarna Merchant Portal. Then, complete the Klarna configuration from the Admin of your Magento store.



Klarna Merchant Portal

Step 1: Set Up Your Klarna Account

1. Visit the Klarna website, and sign up for an account. Then, sign in to your account on the Klarna Merchant Portal.

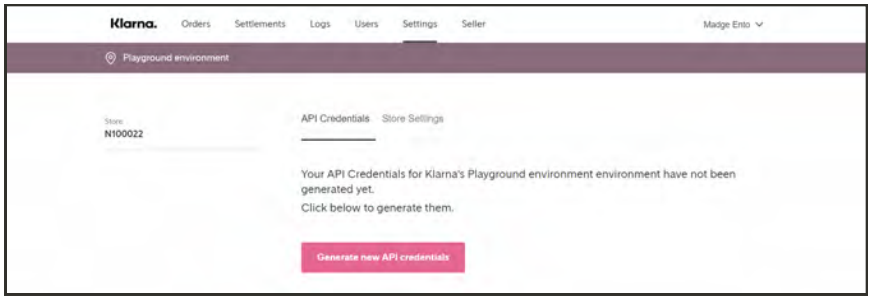
2. To generate your API Credentials for Klarna's Playground environment, do one of the following:

   - Tap the **Settings** icon.
   - In the main menu, choose **Settings**.

   Then, do the following:

   a. On the **API Credentials** tab, tap **Generate new API credentials**.

   b. **Copy** your credentials, and save them to a notepad. You will need them later to complete the Magento configuration.



Generate API Credentials

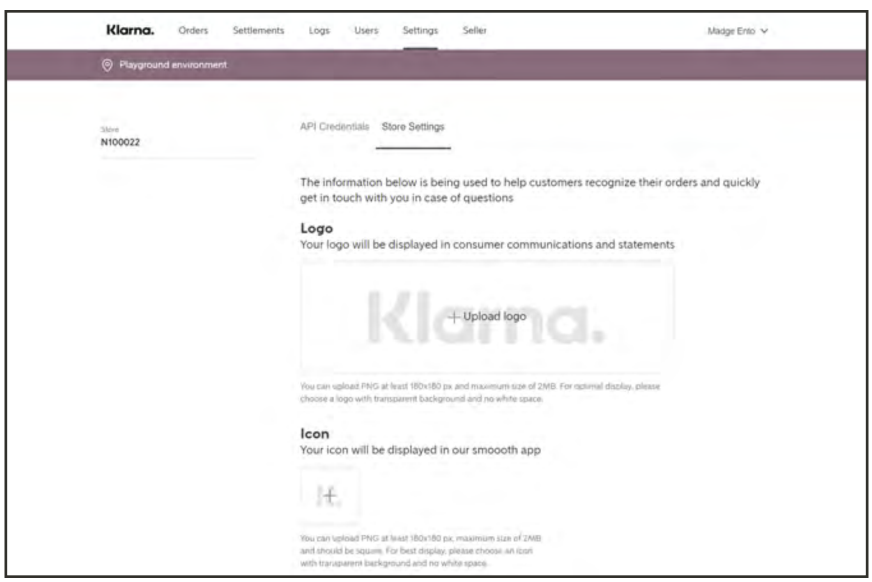
3. On the **Store Settings** tab, do the following:

   a. Take note of your **Store ID** in the upper-left corner of the page. Copy and paste the value into Notepad, along with your API credentials.

   b. If the image files are ready, upload your **logo** and **icon**. Otherwise, you can complete this step later.

   c. Complete the following store information:

      - Store name
      - Homepage URL
      - Customer Support Email
      - Customer Support Phone



Store Settings

Step 2: Configure Magento

1. Open another browser tab, and log in to the Admin of your Magento store.

2. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.

3. In the upper-left corner, choose the **Store View** where the configuration applies. If your installation has only one view, accept the "Default Config" setting.

4. In the panel on the left, under **Sales**, choose **Payment Methods**. Under **Other Payment Methods**, expand the **Klarna** section. Then, tap **Configure**.

Klarna

5. Expand the **Klarna API** section. then, do the following:

   a. Set **API Version** to one of the following:

      - Klarna Payments (Europe)
        Supported countries: AT, DE, DK, FI, NL, NO, SE
      - Klarna Payments (North America)

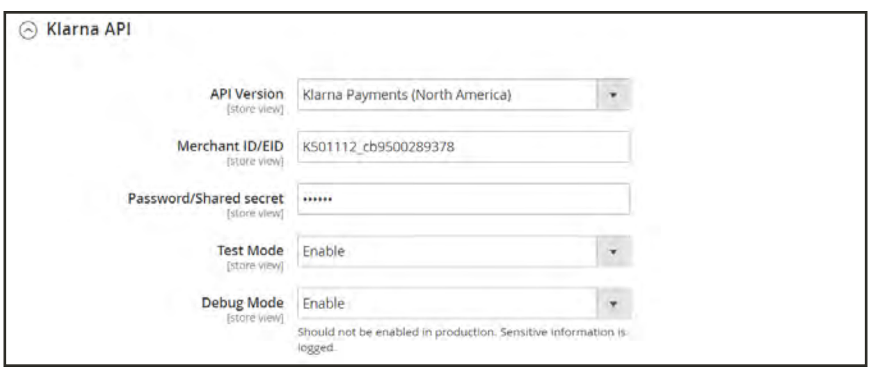
   b. In the **Merchant ID/EID** field, enter the **Store ID** from your Klarna account.

   c. Enter the **Password/Shared secret** from your Klarna account.

   d. To use the Klarna Playground for test transactions, set **Test Mode** to "Yes."

   e. To generate a record of interactions while testing the integration, set **Debug Mode** to "Yes."

Turn Debug Mode off before going live with Klarna in your production store.



Klarna API

6. Expand the **Klarna Payments** section. then, do the following:

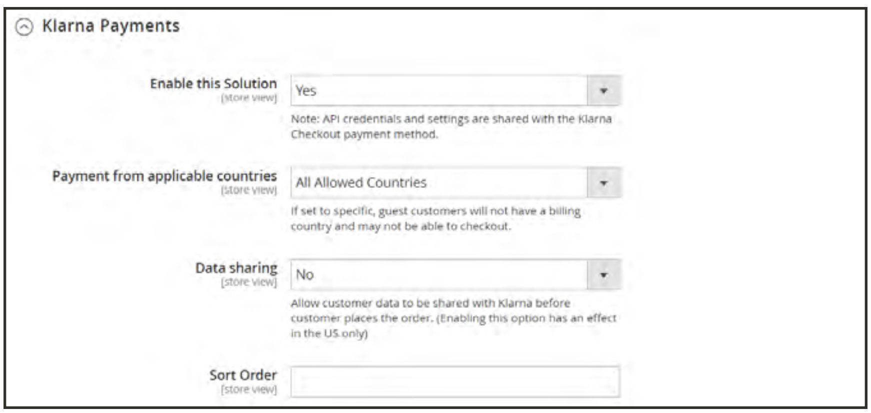
   a. Set **Enable this Solution** to "Yes."

   b. Set **Payment from applicable countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

   c. (U.S. Only) If you want Klarna to prepare set of personalized credit options for each customer, set **Data sharing** to "Yes."

   d. Enter a **Sort Order** number to determine the position of Klarna in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)



Klarna Payments

7. If you want to stop here, tap **Save Config**. Then when prompted, click the Cache Management link at the top of the page to refresh all invalid caches.

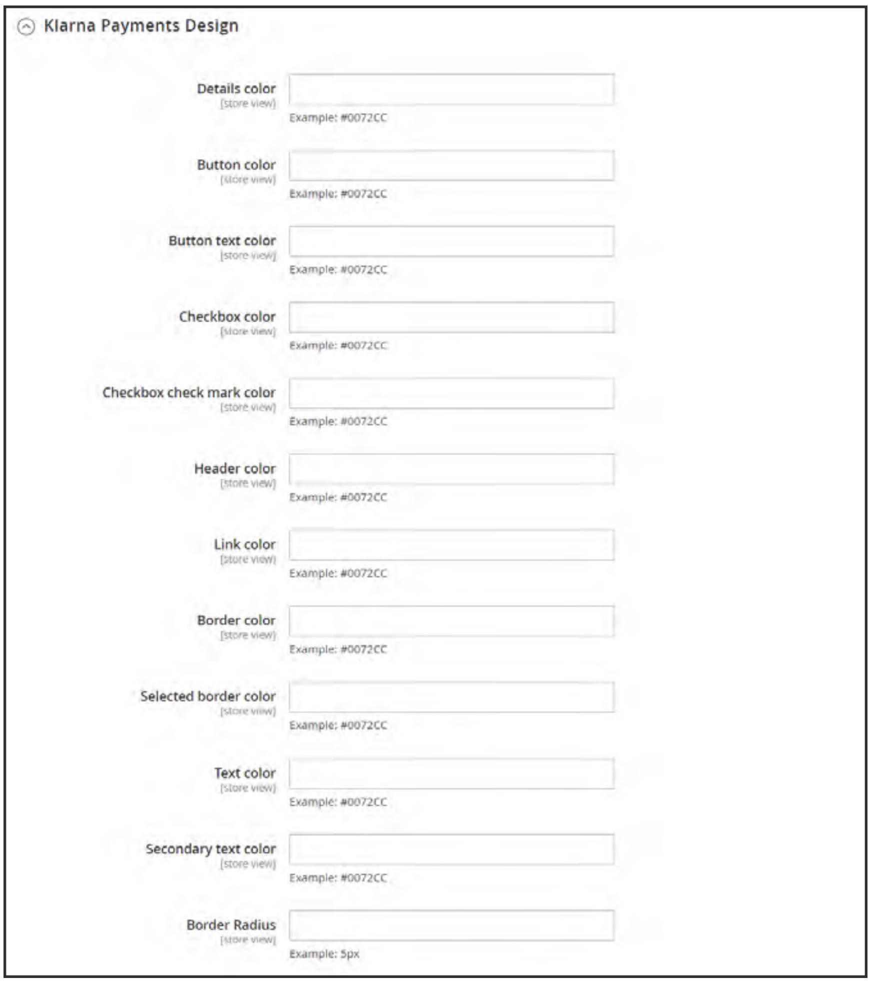
Step 3: Complete the Design Settings (Optional)

You can complete the Klarna Payment Design Settings now, or at a later time. You might use a color picker to experiment with different colors for each element to match your store's theme. The results might vary, depending on theme.

Enter the hexadecimal value of the color that you want to use for each element.

- Details color
- Button color
- Button text color
- Checkbox color

- Checkbox check mark color
- Header color
- Link color
- Border color
- Selected border color
- Text color
- Secondary text color
- Border radius



Klarna Payments Design

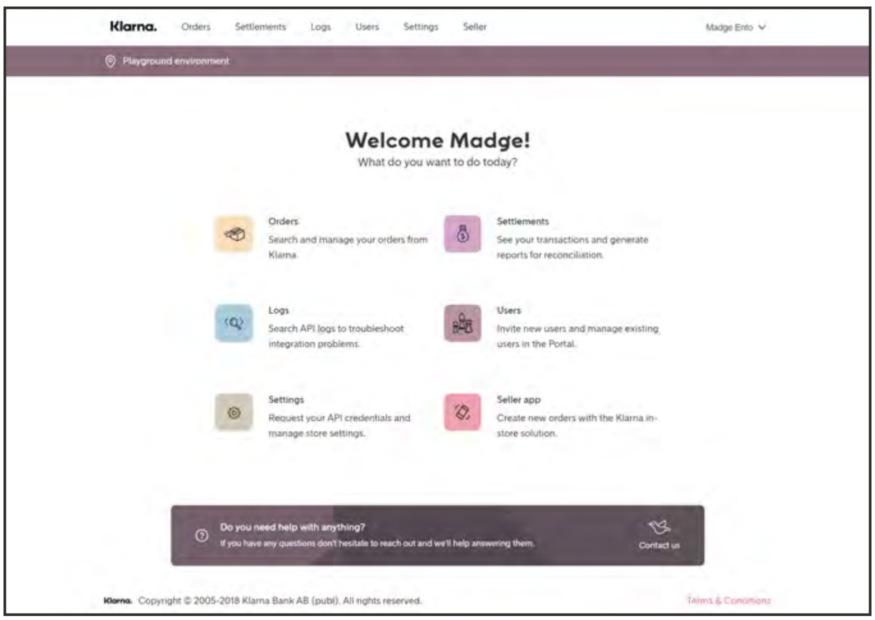
8. When complete, tap **Save Config**. Then when prompted, click the Cache Management link at the top of the page to refresh all invalid caches.

Managing Your Account

The Klarna Merchant Portal makes it easy to manage orders, view transactions, and generate reconciliation reports. You can also manage your Klarna account settings, and add new users to your account.

All orders are captured from the Magento Admin. However, Klarna supports post-order processing from the Magento Admin for the following events:

EVENT	ACTION
Canceled Order	Sends cancel to Klarna.
Full/Partial Capture	Sends capture to Klarna.
Full/Partial Refund	Sends refund to Klarna.



Klarna Merchant Portal

To manage orders:

Do one of the following:

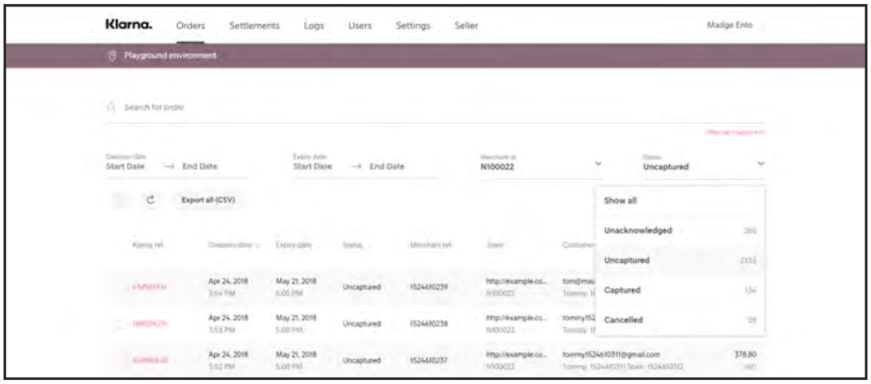
- In the main menu, choose **Orders**.
- On the Klarna dashboard, choose **Orders**.

Then, do any of the following:

Find an Order

1. To filter the list, set **Status** to one of the following:

- Unacknowledged
- Uncaptured
- Captured
- Cancelled



Show

2. To find a specific order, enter any of the following into the **Search for order** box:
   - Customer name and email
   - Merchant reference
   - Klarna reference
   - Order ID

Export Orders

1. Tap **Export all (CSV)**.
2. Look for the export file in the lower-left corner of the browser window. Then, open the file in your spreadsheet.

	A	B
1	order_id;klarna_reference;merchant_reference1;merchant_reference2;created_at;expires_at;merchant_id;merchant_name;billing_address_e	
2	4be3759d-4489-52c9-91aa-b2bb08610669;"VXS1VB4Z";"100000059";"";"2017-02-16T20:14:45.145+00:00";"2017-03-16T00:00:00.000+00:00"	
3	a9f602df-9	Suite 300";"43215";"Columbus";"US";"16149291287";"account";"70.00";"USD"
4	5b043d40-6464-6e65-859e-ad80045a6281;"B5N5GSW4";"";"";"2017-02-22T23:56:40.852+00:00";"2017-03-22T00:00:00.000+00:00";"N10002	
5	fd184ee8-	Suite 300";"43215";"Columbus";"US";"(614) 929-1287";"statement";"143.00";"USD"
6	fd0f648b-590e-527e-a119-1e5cf6bafe1d;"W2T01XDJ";"100000064";"";"2017-03-02T16:57:16.163+00:00";"2017-03-30T00:00:00.000+00:00";	
7	7e6f78fd-a	Suite 300";"43215";"Columbus";"US";"+1 614-929-1287";"statement";"70.00";"USD"
8	58226b52-	Suite 300";"43215";"Columbus";"US";"6144997453";"account";"230.00";"USD"
9	b8cdc644-	Suite 300";"43215";"St. Columbus";"US";"6144997453";"account";"275.00";"USD"
10	c3b6e81c-	Suite 300";"43215";"Columbus";"US";"16149291287";"account";"250.00";"USD"
11	cc495768-	Suite 300";"43215";"Columbus";"US";"6144997453";"account";"64.00";"USD"
12	a719a73b-0e8e-6649-ad75-e2b4b65cb85c;"QZ2J1H9H";"145000098";"";"2017-03-10T15:51:08.996+00:00";"2017-04-07T00:00:00.000+00:00"	
13	b3fc053c-l	Suite 300";"43215";"Columbus";"US";"+1 614-499-7453";"statement";"51.82";"USD"
14	76ad0a42-	Suite 300";"43215";"Columbus";"US";"+1 614-499-7453";"account";"70.00";"USD"
15	e49c1dad-24c0-6f60-8dc9-001af182b9aa;"XCN2XWB7";"2000000026";"";"2017-04-06T01:10:38.506+00:00";"2017-05-04T00:00:00.000+00:0	
16	e7ae5e72-	Suite 300";"43215";"Columbus";"US";"+1 614-499-7453";"statement";"70.27";"USD"
17	5155c716-	Suite 300";"43215";"Columbus";"US";"+1 614-499-7453";"statement";"00.00";"USD"
18	4dbb5075-faa2-646e-8533-a29508c7932c;"8N1GQRB9";"145000104";"";"2017-04-10T14:15:46.915+00:00";"2017-05-08T00:00:00.000+00:00	
19	c5655a7e-9fbe-6f05-8599-552824ffdde8;"3XP5QDJZ";"145000107";"";"2017-04-10T15:49:12.698+00:00";"2017-05-08T00:00:00.000+00:00";"	
20	0a7ffdf8-4185-6949-ae41-88129982ed8e;"QJ5Q2FW1";"145000108";"";"2017-04-12T19:45:44.707+00:00";"2017-05-10T00:00:00.000+00:00"	
21	9d85b878-89e5-6e70-b6db-b1aca5d99fc9;"V549F5L5";"145000115";"";"2017-04-12T19:55:01.416+00:00";"2017-05-10T00:00:00.000+00:00";	
22	3035676b-c0c9-58a2-83fa-09867f8fc5ef;"Q8DDC935";"100000006";"";"2017-04-15T03:05:09.319+00:00";"2017-05-13T00:00:00.000+00:00";	
23	a2675865-b940-5238-9d02-b4d2b1000332;"FTRDWKC3";"100000009";"";"2017-04-17T17:49:31.171+00:00";"2017-05-15T00:00:00.000+00:0	
24	046f33cf-687c-5944-af38-b2447437877b;"D0H76PXL";"100000070";"";"2017-04-17T14:45:24.237+00:00";"2017-05-15T00:00:00.000+00:00";	

Exported Orders

Amazon Pay

Amazon Pay and Login with Amazon offer your customers a secure and convenient way to pay that is easy to set up, and that helps to increase conversions and sales. Customers who log in to your store with their Amazon credentials can speed through checkout using the payment and shipping information that is already stored in their Amazon accounts.

Shop Safely

Customer purchases are protected by Amazon’s A-to-z Guarantee. Customer password and payment information is never shared.

Speed Through Checkout

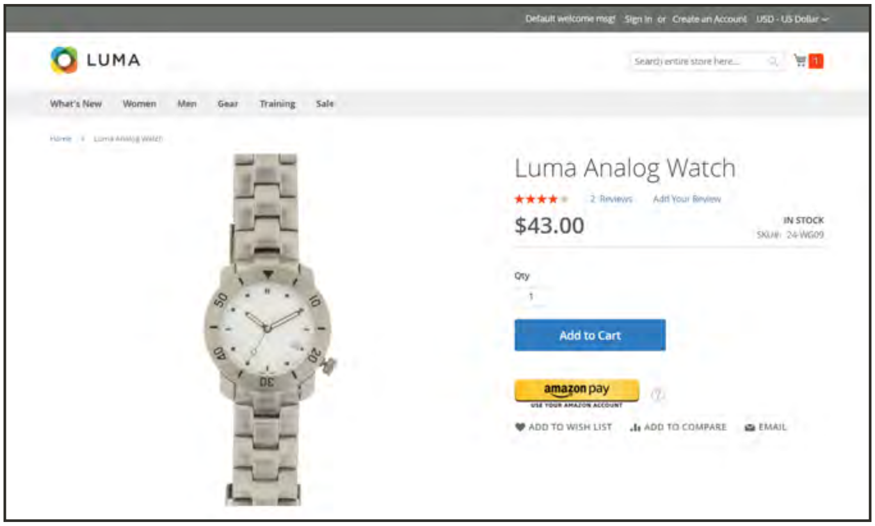
During checkout, shipping and payment information is read directly from the customer’s Amazon Payments account.

Log in with Amazon

Customers can use their Amazon password to log in to their account with your store.

Amazon Pay Customer Experience

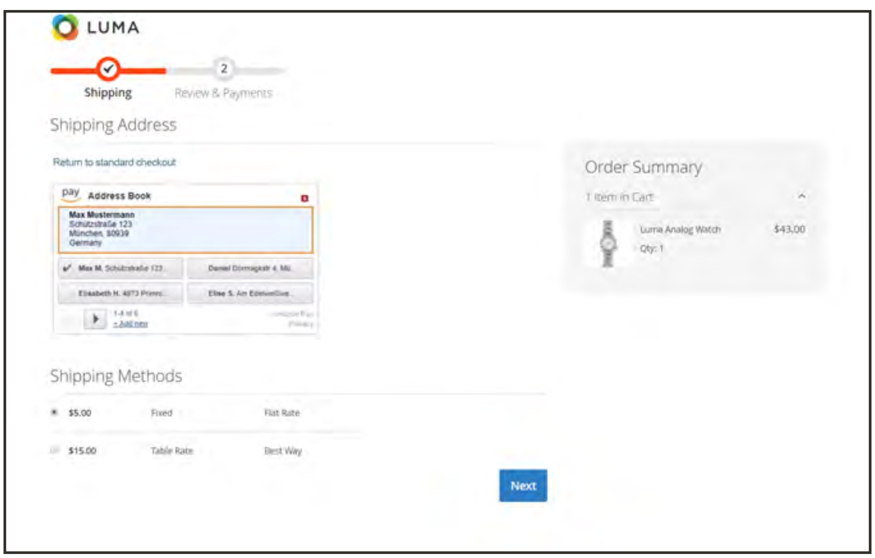
Customers can speed through checkout by using the payment methods and shipping addresses that are available in their Amazon accounts. Your store can be configured to show the Amazon Pay button on product pages, and in the cart sidebar, shopping cart, and during checkout.



Amazon Pay on Product Page

To place an order with Amazon Pay:

1. To begin the checkout process, tap **Amazon Pay**. Then when prompted, enter your Amazon credentials.

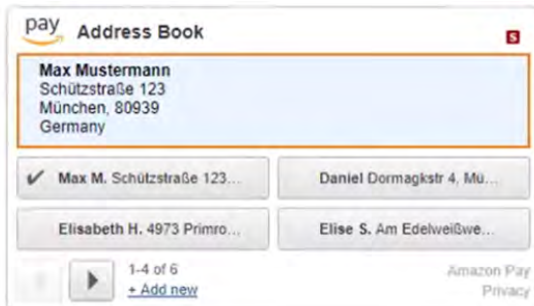


Shipping Addresses

2. Choose the **shipping address** from your Amazon Address Book.

The pagination indicator shows how many addresses are available. However, only four can be viewed at a time.

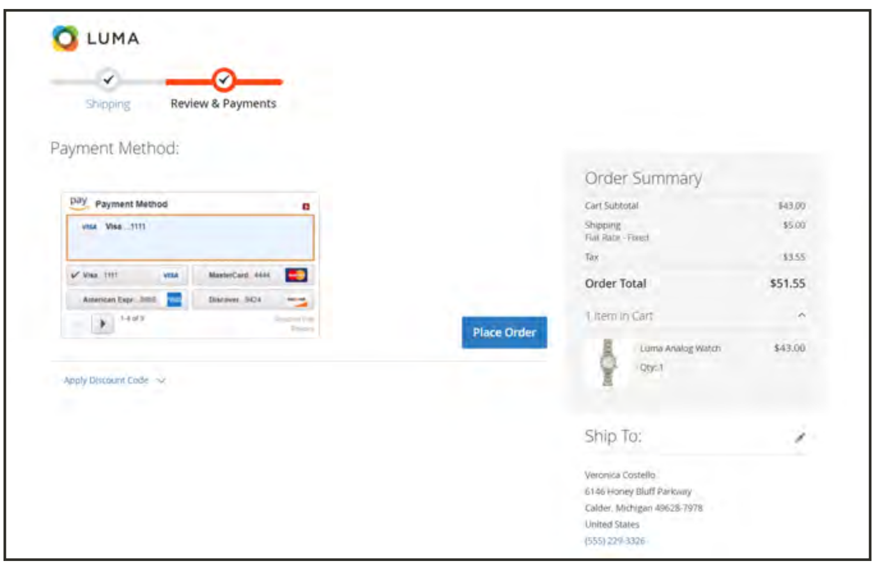
- Click the **arrow** (▶) to view all available options.
- To add a new address to the Address Book, click **Add new**.
- If you prefer, click **Return to standard checkout**.



Amazon Pay Address Book

3. Choose the **Shipping Method** that you want to use for the order. Then, tap **Next**.

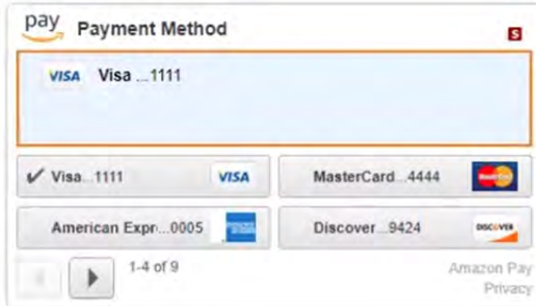
4. During the **Review & Payments** checkout step, the standard Magento payment methods are replaced with the payment methods that are available in your Amazon account.



Review & Payments

The pagination indicator shows how many payment methods are available. However, only four can be viewed at a time.

- Click the **arrow** (▶) to view all available options.
- Choose the **Payment Method** that you want to use for the purchase.



Amazon Pay Payment Method

5. Enter a **Discount Code**, if applicable.
6. Review the order. Then, tap **Place Order**.

Setting Up Amazon Pay

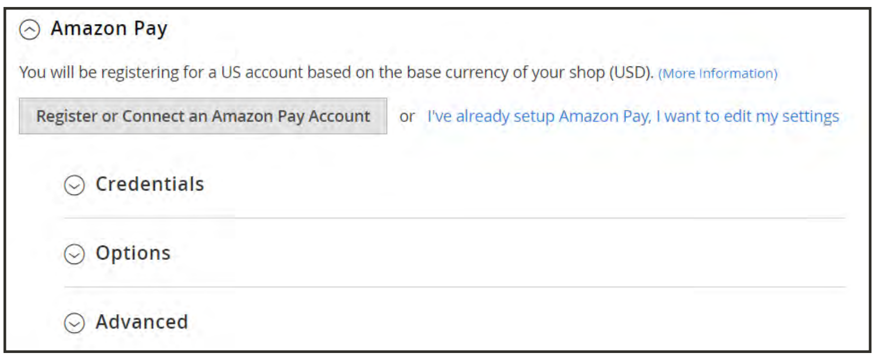
Amazon Pay and Login with Amazon work together to create a great buyer experience. To learn more, see the Amazon Pay and Login with Amazon documentation for Magento 2.

To set up Amazon Pay:

1. On the Admin menu, choose **Stores**. Then under **Settings**, choose **Configuration**. Then, do the following:

   a. In the upper-right corner, set the **Store View** chooser to establish where the Amazon Pay configuration applies.

   b. In the panel on the left under **Sales**, choose **Payment Methods**. Then under **Other Payment Methods**, expand the **Amazon Pay** section.

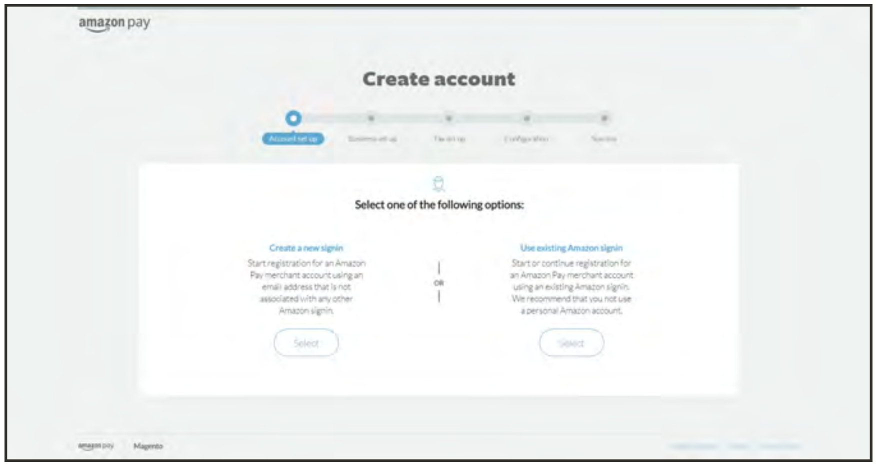


Amazon Pay

2. Under **Amazon Pay**, tap **Register or Connect an Amazon Pay Account**.

Do not use your personal Amazon account for Amazon Pay.

a. If you do not yet have an Amazon merchant account, choose **Create a new signin**, and tap **Select**. Then, follow the onscreen instructions to create a new account.



Create Amazon Pay Account

b. If you already have an Amazon merchant account, choose **Use existing Amazon signin**, and tap **Select**. Then, complete the following sections:

Credentials

1. Expand the **Credentials** section. Your credentials are transferred automatically from your Amazon Pay account to the Magento Admin. Your credentials can also be found in Amazon Seller Central in both Production and Sandbox modes.

   To use test credentials from the Amazon Pay Sandbox, do the following:

   a. Get your Test Credentials for the Amazon Pay Sandbox.

   b. In the Magento Amazon Pay configuration under Credentials, mark the **Test Credentials** checkbox.

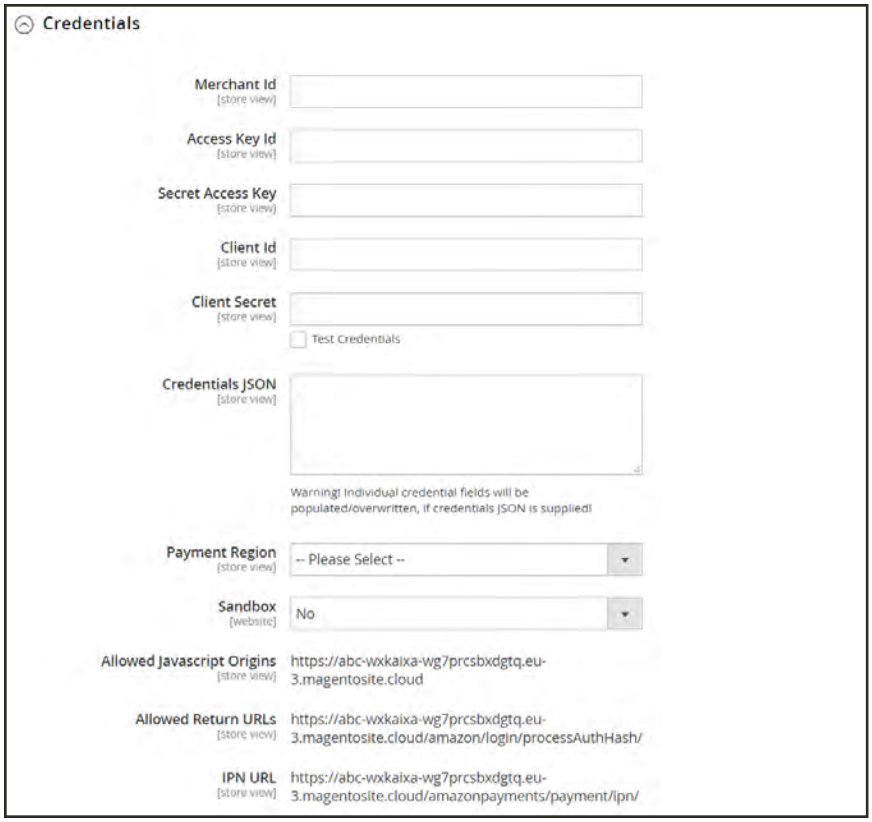
   c. Enter the following credentials that you copied from the Amazon Pay Sandbox on Amazon Seller Central:

   - Merchant Id
   - Access Key Id
   - Secret Access Key
   - Client ID
   - Client Secret

   d. Set **Sandbox** to "Yes."

   When you are through testing and ready to go live with Amazon Pay, return to the configuration and clear the **Test Credentials** checkbox. Then, set Sandbox to "No" and tap **Save Config**.

2. Verify the **Payment Region** for the store.



Credentials

3. When complete, tap **Save Config**.

Look for the message, "Your Amazon configuration is valid" at the top of the Configuration page.

- If your credentials are valid, continue with the configuration.
- Otherwise, correct your credentials, and try again.

Options

1. Expand the **Options** section.
2. Set **Enable Amazon Pay** to “Yes.”
3. Set **Enable Login with Amazon** to “Yes.”
4. Set **Payment Action** to one of the following:

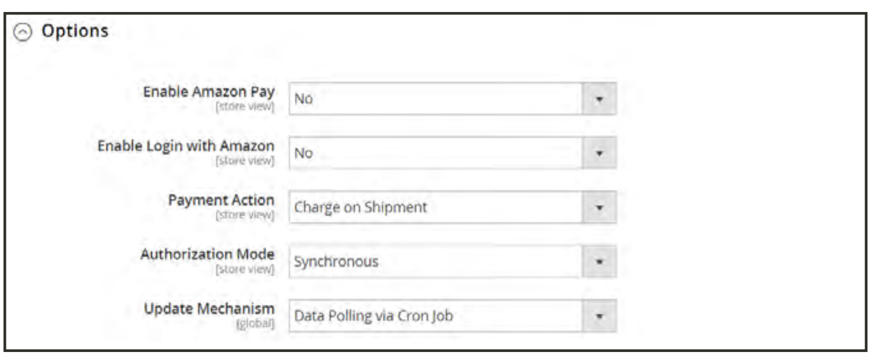
Charge on Shipment	(Default) Amazon receives a capture request and charges the customer when an invoice is created in Magento.
Charge on Order	Amazon creates the invoice and charges the customer when the order is placed.

5. Set **Authorization Mode** to one of the following to determine the method that is used to transmit authorization data.

Synchronous	(Default) Makes the disposition of an authorization available within a couple of seconds.
Asynchronous	The status of sales order is “Pending” while the disposition of authorization is outstanding.
Synchronous if Possible	(Recommended) Uses synchronous authorization if possible, and switches to asynchronous processing as needed, for some declines. The change in processing modes is transparent to the user.

6. Set **Update Mechanism** to one of the following:

Data Polling via Cron job	(Default) Uses the standard Magento notification process that is scheduled by Cron job.
Instant Payment Notifications	(IPN) Sends notifications to the Instant Payment Notification URL.



Options

Advanced Settings

1. Expand the **Frontend** section. Then, do the following as applicable:

   a. (Optional) If your store is available in multiple languages, you can display the text on the Amazon Pay button in a different language for each store view. To override the default display language for the current store view, enter one of the following language parameters in the **Button Display Language** field:

en-GB	English (Great Britain)
de-DE	German (Germany)
fr-FR	French (France)
it-IT	Italian (Italy)
sp-SP	Spanish (Spain)

   To learn more, see Language in the Amazon Pay Integration Guide.

   b. Set **Button Color** to one of the following:

   - Gold
   - Light Gray
   - Dark Gray

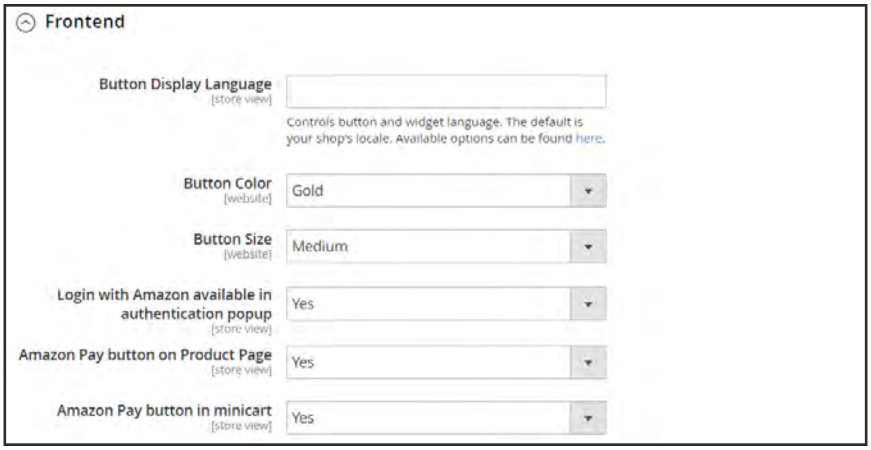
   To learn more, see the Merchant Tools page on the Amazon Pay website.

   c. Set **Button Size** to one of the following:

   - Small
   - Medium
   - Large
   - Extra Large

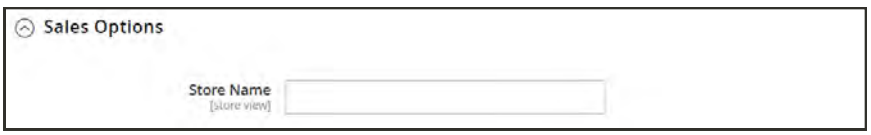
   d. Choose "Yes" for each feature that you want to enable for the current store view:

   - Login with Amazon available in authentication popup
   - Amazon Pay button on Product Page
   - Amazon Pay button in minicart



Frontend

2. Expand the **Sales Options** section. Then, enter the **Store Name**.



Sales Options

3. When complete, tap **Save Config**.

4. In the message at the top of the page to refresh cache types, click **Cache Management**. Then, do the following:

   a. Mark the checkbox of each invalid cache.

   b. With the control set to “Refresh,” tap **Submit**.

Using Amazon Seller Central

Use the chooser at the top of the page to change the view of Amazon Seller Central. The options include all the Amazon resources that are associated with your account. Each view is a separate dashboard with specific resources for the view.

Amazon Seller Central (Production View)

To change views:

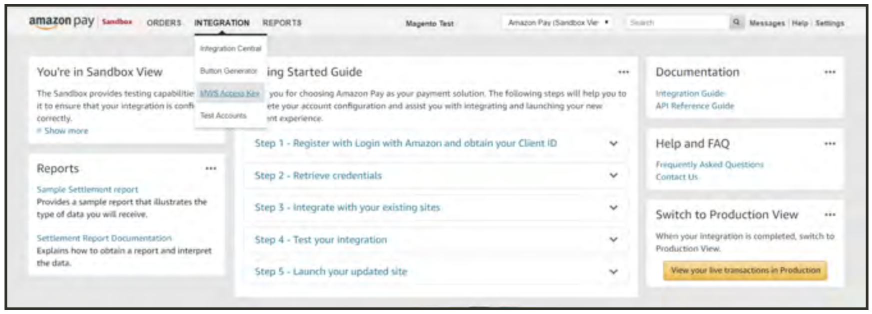
Set the chooser to the view that you want to see. The following views relate to the Magento integration of Amazon Pay:

- Amazon Pay (Sandbox View)
- Amazon Pay (Production View)
- Login with Amazon

To find your credentials:

To run test transactions from the Amazon Pay Sandbox, you must copy the keys from your account on Amazon Seller Central. Then, enter the keys into the Magento Amazon Pay configuration. Your credentials can be found in both the Production and Sandbox views of Amazon Seller Central.

1. Log in to your seller account on **Amazon Seller Central**.
2. Set the chooser to one of the following:
   - Amazon Pay (Production View)
   - Amazon Pay (Sandbox View)
3. On the main menu, under **Integration**, choose **MWS Access Keys**. Then, do the following:



Amazon Seller Central (Sandbox View)

a. In the page header, tap **Copy your keys**.

Copy Your Keys

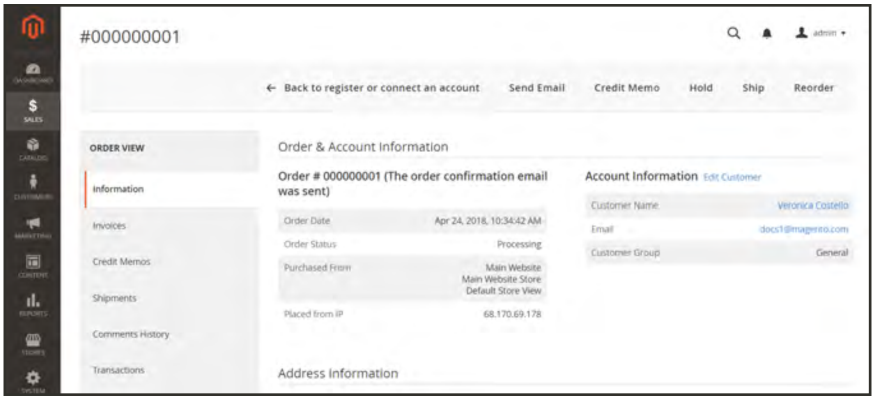
b. Your keys are formatted as a JSON string, with each item enclosed in double quotes. **Copy** your keys, and paste them into Notepad. Then, **Close** the box. You will need them to complete the Amazon Pay configuration for Sandbox Mode in the Magento Admin.

> Your keys are confidential, and should not be shared.

Your Credentials

Managing Amazon Pay Transactions

All purchases made in your store and processed by Amazon Pay can be viewed from the Amazon Pay website. If you receive a request for a refund, follow the normal Magento process to issue a credit memo and make a refund. The Credit Memo button appears after a sales order is invoiced.



Invoice with Credit Memo Button

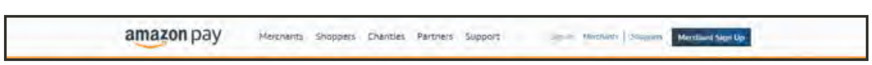
To issue a refund:

1. On the Admin sidebar, choose **Sales**. Then on the menu, choose **Orders**.
2. Find the completed order to be refunded. Then in the **Action** column, click **View**.
3. In the button bar, tap **Credit Memo**.
4. Scroll down to the bottom of the page, and confirm the **Refund Totals**.
5. When complete, tap **Refund Online**.

   For more detailed instructions, see: Issuing a Credit Memo.

To view Amazon Pay activity:

1. Go to pay.amazon.com.
2. In the header at the Sign In prompt, choose **Merchants**. Then, do the following:

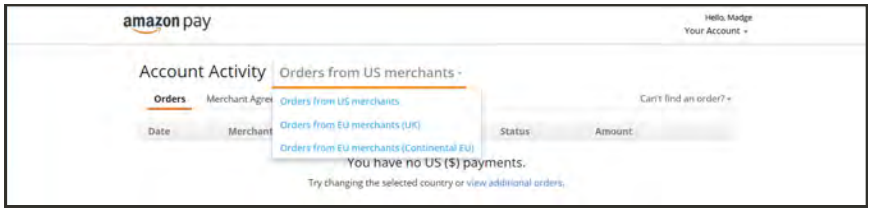


Merchant Sign In

3. When prompted, do the following:
   a. Enter your **email address** or **mobile number**.
   b. Enter your **password**.

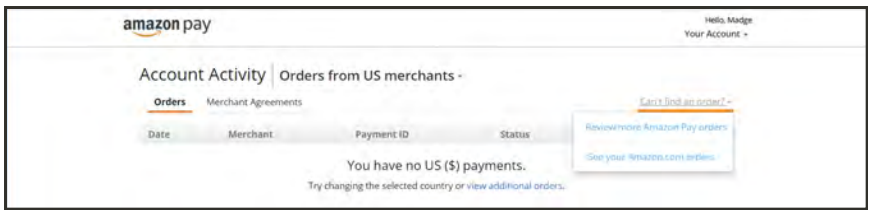
c. Tap **Sign in**.

4. To view orders from a specific region, choose the region from the **Account Activity** control.



Orders from Region

5. To find an order, click **Can't find an order?** Then, choose the Amazon service that processed the order.



Can't find an order?

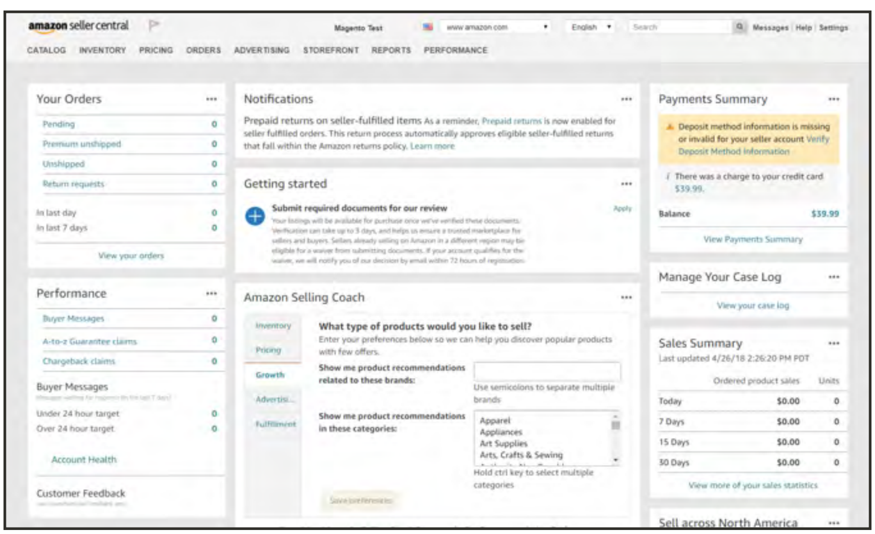
Amazon Pay Resources

Amazon Seller Central has a wealth of information and tools to help you manage your Amazon Pay account. To learn more, see the online help and documentation on Amazon Seller Central.

Amazon Pay Website

To find help:

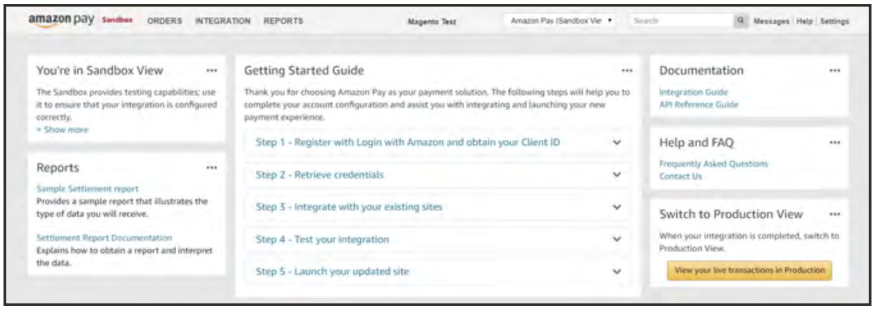
1. Log in to your Amazon seller account on **Seller Central**.
2. In the upper-right corner, click **Help**.



Amazon Seller Central

3. In the header, set the integration chooser to “Amazon Pay (Sandbox View).”

   - The **Getting Started Guide** in the center of the page offers step-by-step instructions for implementing Amazon Pay.
   - You’ll find additional guides for developers In the right sidebar under **Documentation**, and additional resources under **Help and FAQ**.



Getting Started Guide

Authorize.Net Direct Post

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.

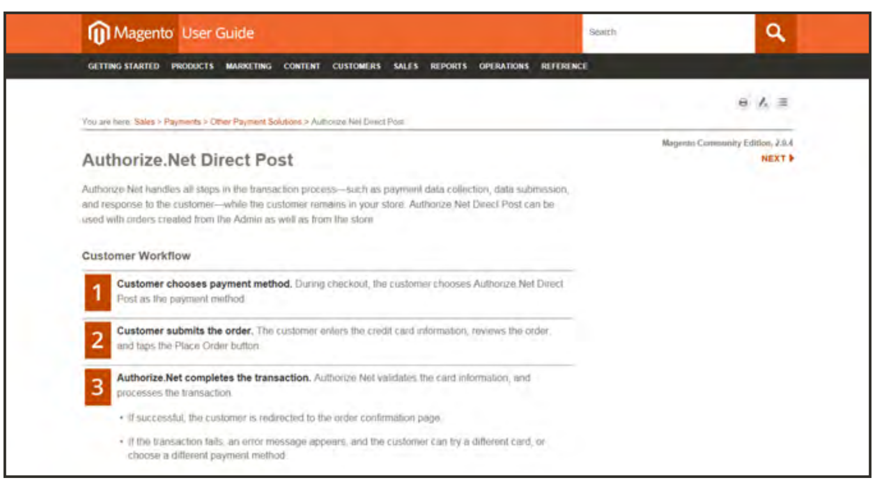
2 **Customer submits the order.** The customer enters the credit card information, reviews the order, and taps the Place Order button.

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.

Setting Up Authorize.Net Direct Post

For step-by-step configuration instructions, see Authorize.Net Direct Post in the Magento Commerceonline user guide.



Authorize.Net Direct Post

CyberSource

CyberSource was one of the pioneers in the early online payment industry, and later acquired Authorize.Net. Today, CyberSource is a wholly-owned subsidiary of Visa Inc. Over 400,000 businesses worldwide use CyberSource to process online payments, streamline fraud management, and to simplify payment security. The company is based in Foster City, California, and has offices throughout Asia, Europe, Latin America, the Middle East, Africa, and the United States.

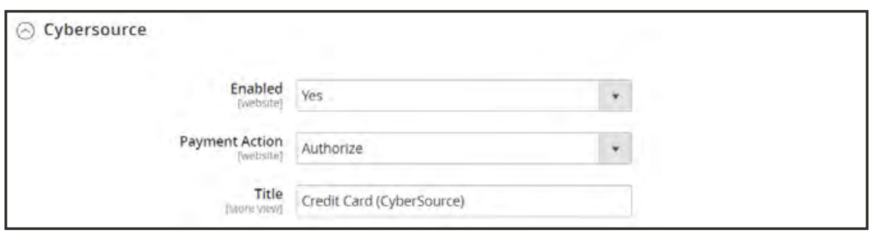
CyberSource supports shipments to multiple addresses as part of the checkout flow. The order is duplicated for each address that the customer wants to ship to.

Step 1: Get Your CyberSource Credentials

Sign up for a CyberSource merchant account, and get your credentials.

Step 2: Enable CyberSource

1. Set **Enabled** to "Yes."
2. Accept the **Default Payment** action of "Authorized Only," which approves the purchase and puts a hold on the funds. The amount is not withdrawn from the customer's bank account until the sale is "captured" by the merchant.
3. Enter a **Title** to identify CyberSource during checkout.



Enable CyberSource

Step 3: Enter Your CyberSource Credentials

Enter the following credentials from your CyberSource account:

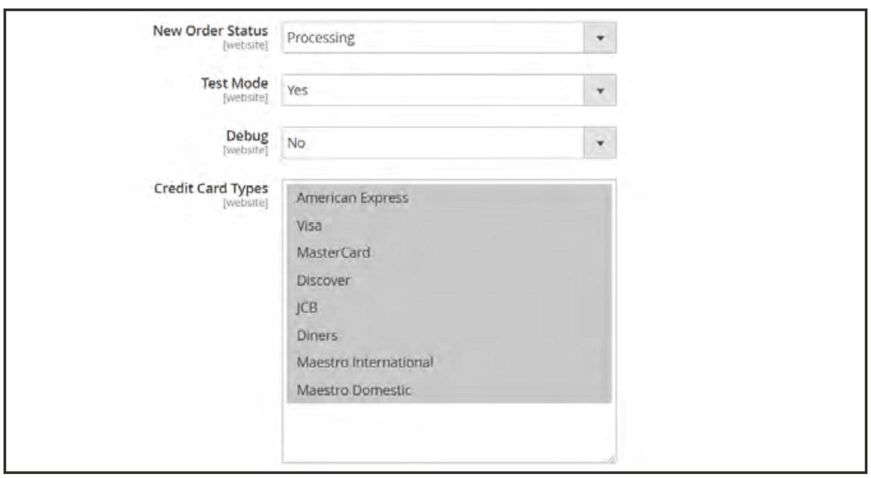
- Merchant ID
- Profile ID
- Transaction Key
- Access Key
- Secret Key

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

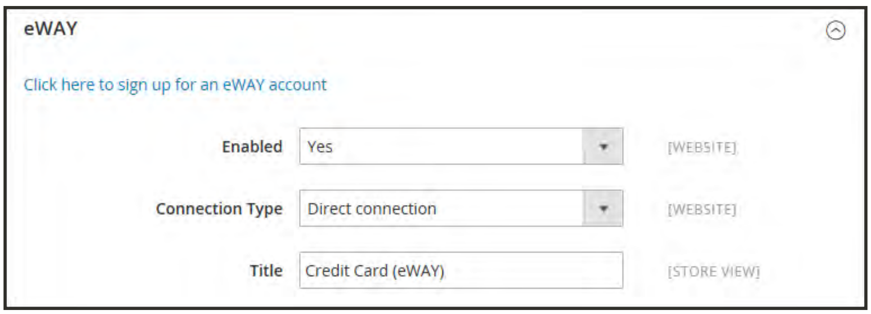
eWAY is based in Australia, and provides secure payment processing services to merchants throughout Australia, New Zealand, the United Kingdom, Singapore, Malaysia, and Hong Kong. Their latest Rapid 3.1 API enables real-time fraud protection.

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.

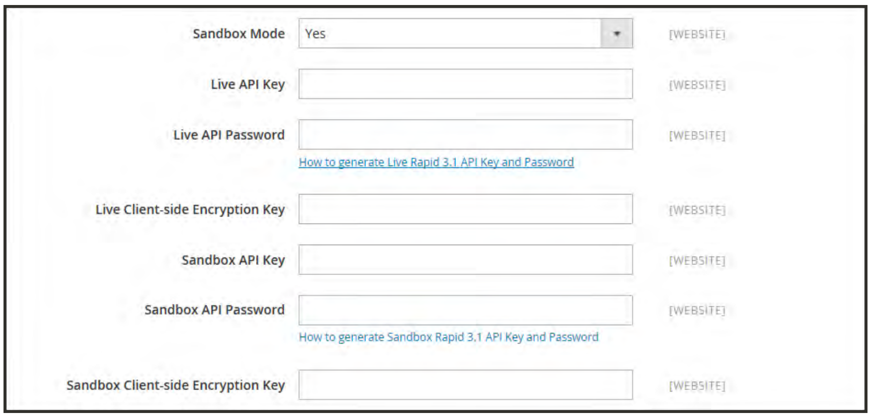
   When you are ready to go live with eWAY, set **Sandbox Mode** to “No.”

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

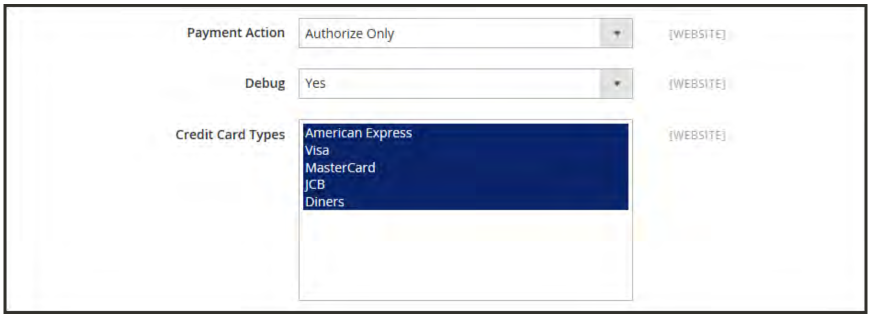
1. Set **Payment Action** to one of the following

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.

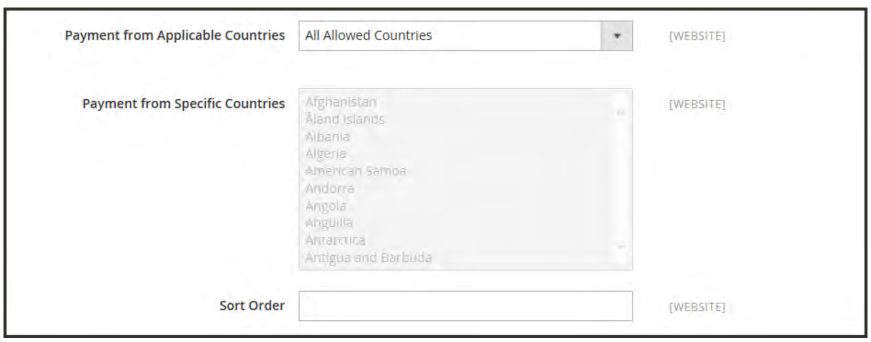


Configure Payments

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.

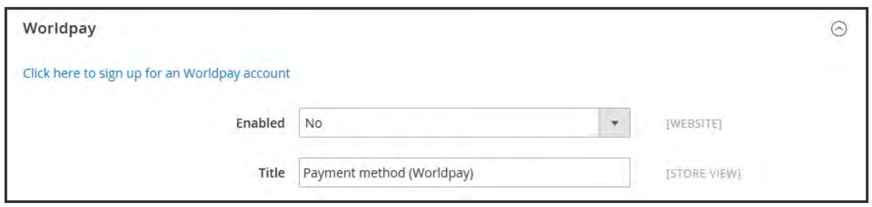
Step 1: Get Your Worldpay Credentials

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.

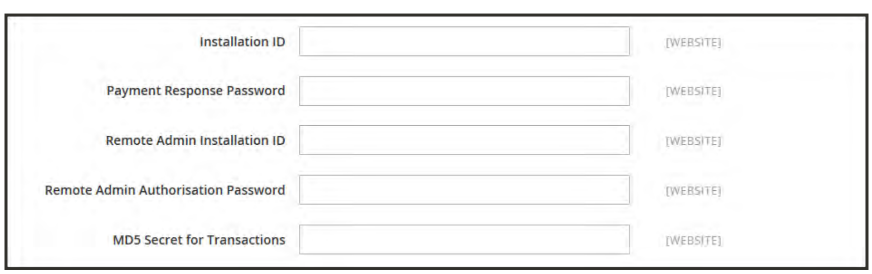


Enable Worldpay

Step 3: Enter Your Worldpay Credentials

Enter the following credentials from your Worldpay account:

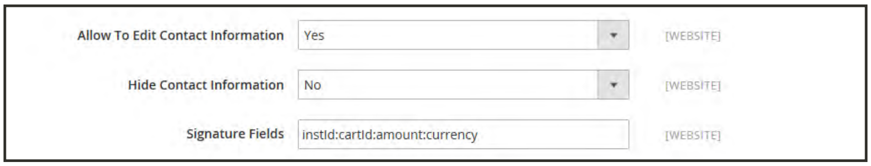
- Installation ID
- Payment Response Password
- Remote Admin Installation ID
- Remote Admin Authorization Password
- MDS Secret for Transactions



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.

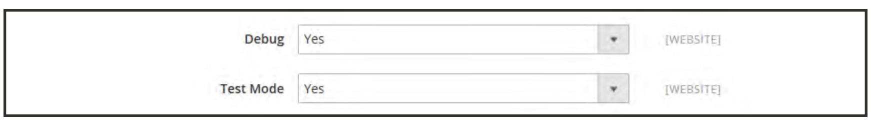


Contact Information

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

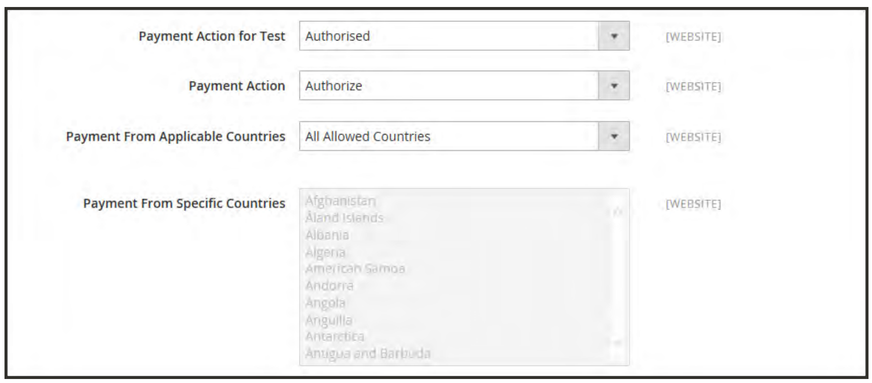
1. To determine the payment action used for test transactions, set **Payment Action for Test** to one of the following:
   - Authorised
   - Error
   - Captured
2. To determine the payment action used for live transactions, set **Payment Action** to one of the following:

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.

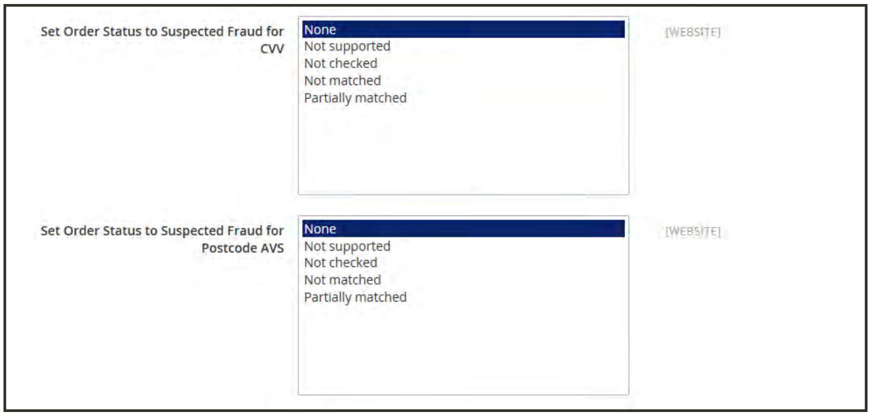


Configure Payments

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**.

CHAPTER 73:

Basic Payment Methods

The payment methods covered in this section are built in to Magento, and do not require the services of a third-party payment processing company.

Offline Payments

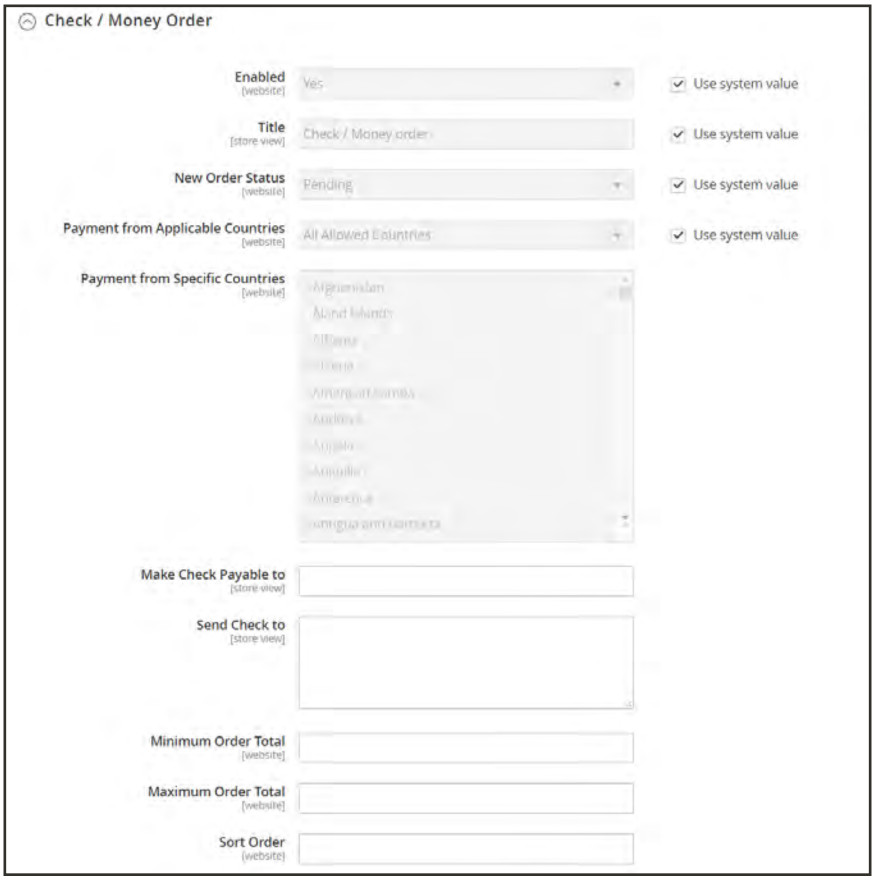
Magento supports a number of offline payment methods, including payment by check or money order, and cash on delivery (COD),

Online Payments

Bank transfer is a basic payment method that is included with all Magento stores.

Check / Money Order

Magento Commerce allows you to accept payments by check or money order. The Check / Money Order payment method is enabled for your 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.

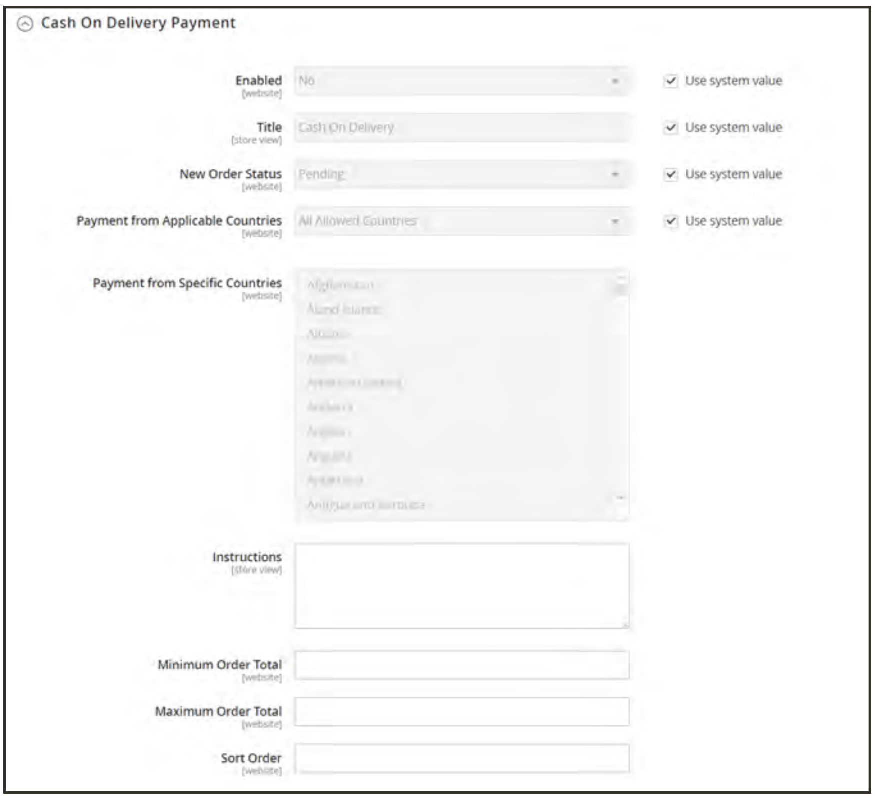
> An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.

   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 Commerce allows you to accept COD payments for purchases. You can accept COD payment from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

The shipping carrier receives payment from the customer at the time of delivery, which is then transferred to you. You can make an adjustment for any fee charged by the carrier service in your shipping and handling charges.



Cash On Delivery Payment

To set up cash on delivery payments:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Expand the **Cash On Delivery Payment** section. Then, do the following:
   a. To activate Cash On Delivery Payment, set **Enabled** to "Yes."
   b. Enter a **Title** to identify the COD payment method during checkout.
   c. Set **New Order Status** to "Pending" until receipt of payment is confirmed.
   d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	After choosing this option, the Payment from Specific Countries list appears. Select each country in the list where customers can make purchases from your store.

   e. Enter the **Instructions** for accepting delivery of a COD order.
   f. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts that are required to qualify for COD payment.

   > An order qualifies if the total is between, or matches, the minimum or maximum order total.

   g. Enter a **Sort Order** number to determine the sequence in which Cash On Delivery is listed with other payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

Bank Transfer

Magento Commerce allows you to accept payment that is transferred from a customer's bank account and deposited into your merchant bank account.

Bank Transfer Payment

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.

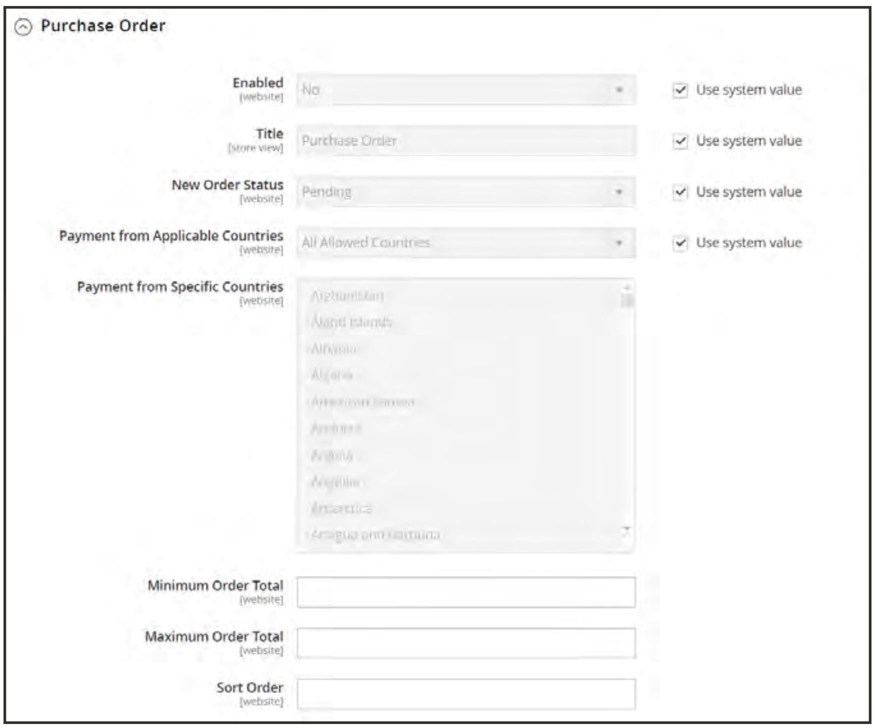
> An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.

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.

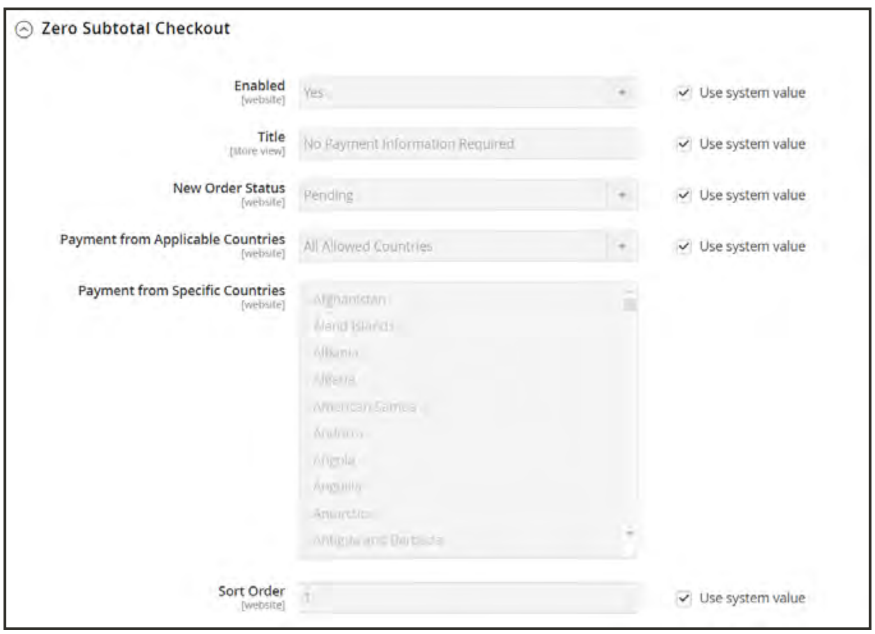
   f. Enter a **Sort Order** number to determine the position of Purchase Order in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

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

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**.

CHAPTER 74:

Fraud Protection

Fraud protection services and filters examine submitted orders before the transaction is processed to detect fraudulent orders and protect you from the expense of chargebacks. Magento supports the following fraud protection solutions:

- PayPal Fraud Management Filter
- Signifyd Guaranteed Fraud Protection
- Fraud Protection Solutions on Magento Marketplace

Signifyd Guaranteed Fraud Protection

Signifyd Guaranteed Fraud Protection automates your order review process so you can accept more orders and maximize revenue without chargeback losses. Signifyd automatically reviews orders for fraud, and indicates which orders to ship, and which to reject. The results of the Signifyd Guarantee Decision appear as a column in the Orders grid.

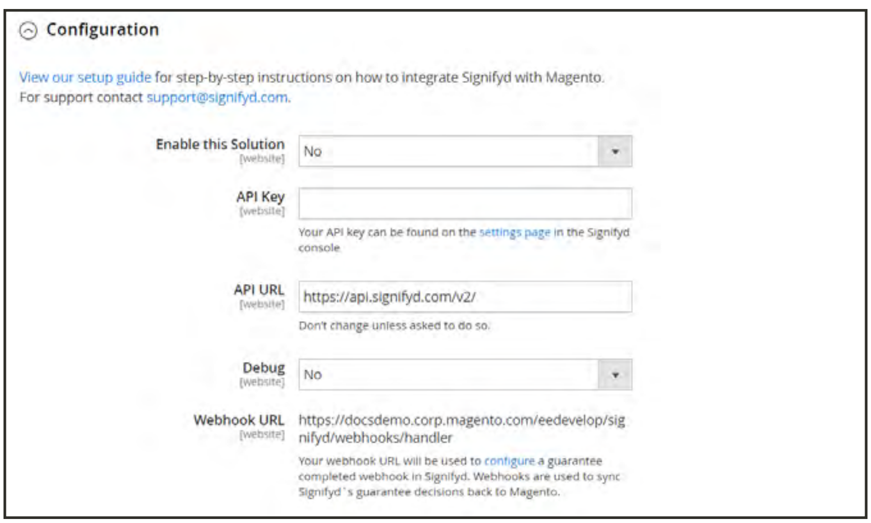
Signifyd's Guaranteed Fraud Protection protects every approved order with a financial guarantee against fraudulent chargebacks, so you can grow your business without fear of fraud.

Step 1: Sign Up for a Signifyd Account

1. Complete Signifyd's Guaranteed Fraud Protection form to contact their Sales team.
2. Follow their one-click installation instructions to install Signifyd on your server.
3. Complete the Signifyd configuration for your Magento installation.

Step 2: Configure Your Magento Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Fraud Protection**.
3. Under **Signifyd**, expand the **Configuration** section. Then, do the following:



Signifyd Configuration

   a. Set **Enable this Solution** to "Yes".
   b. From the **Settings** page of your Signifyd console, enter the **API Key** .
   c. Do not change the default **API URL**, unless instructed to do so.

  d. If you want Magento to keep a log of all interactions between your store and **Signifyd**, set **Debug** to “Yes”.

  e. The **Webhook URL** is the location of the handler that synchronizes Signifyd’s guarantee decisions with your store, and cannot be changed from the Admin.

4. When complete, tap **Save Config**.

Shipping

Contents

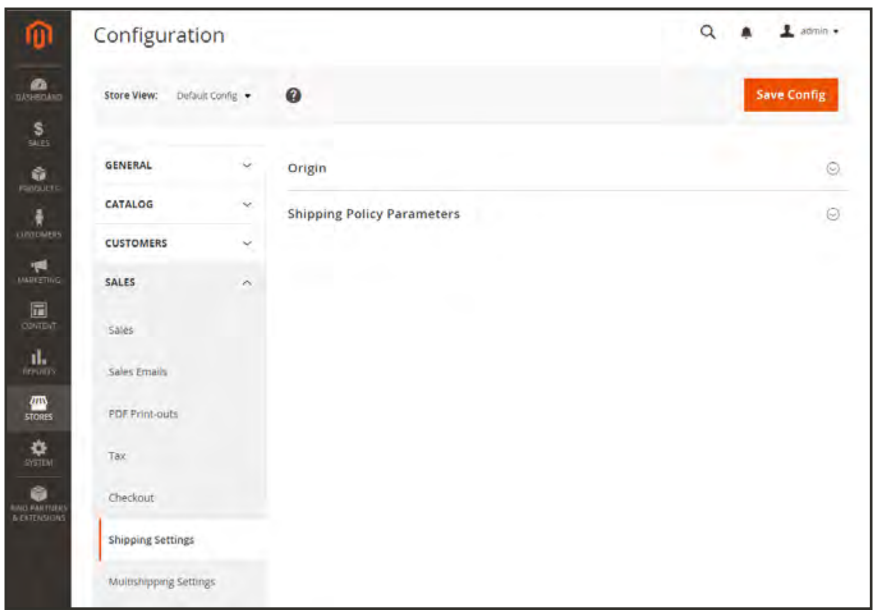
Studies show that stores offering customers a choice of several shipping methods have higher conversion rates than those that use a single method for all shipments. In this section of the guide, you will learn how to set up a variety of shipping methods and carriers, and print shipping labels.

CHAPTER 75:

Shipping Settings

The shipping configuration establishes the point of origin for all shipments, your shipping policy, and the handling of shipments to multiple addresses.

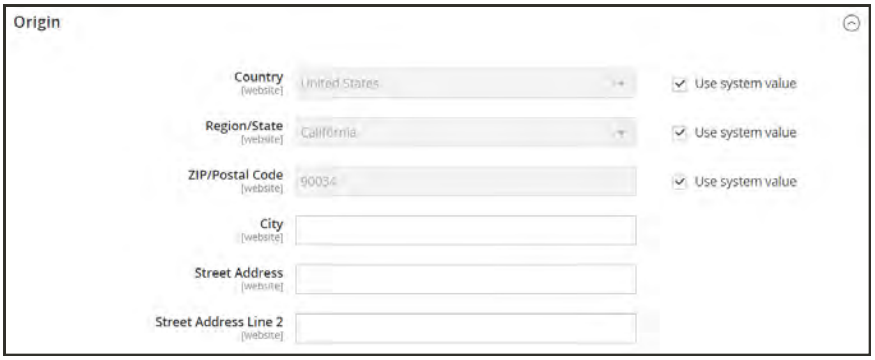
- Point of Origin
- Shipping to Multiple Addresses
- Shipping Policy



Shipping Settings

Point of Origin

The point of origin is used to calculate the charge for shipments made from your store or warehouse, and also determines the tax rate for products sold. When calculating EU taxes, make sure that the Default Tax Destination Calculation for each store view corresponds to the Shipping Settings point of origin.



Origin

To establish the point of origin:

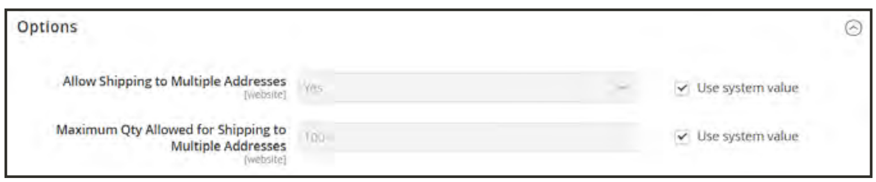
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand the **Origin** section, and complete the following:
   - Country
   - Region / State
   - ZIP / Postal Code
   - City
   - Street Address (and line 2, if needed)
4. When complete, tap **Save Config**.

Multiple Addresses

The Multiaddress Shipping options enable customers to ship an order to multiple addresses during checkout, and determine the maximum number of addresses to which an order can be shipped.

To configure multiple address shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Multishipping Settings**.
3. Expand the **Options** section. Then, do the following:
   a. Set **Allow Shipping to Multiple Addresses** to "Yes."
   b. Enter the **Maximum Qty Allowed for Shipping to Multiple Addresses**.
4. When complete, tap **Save Config**.

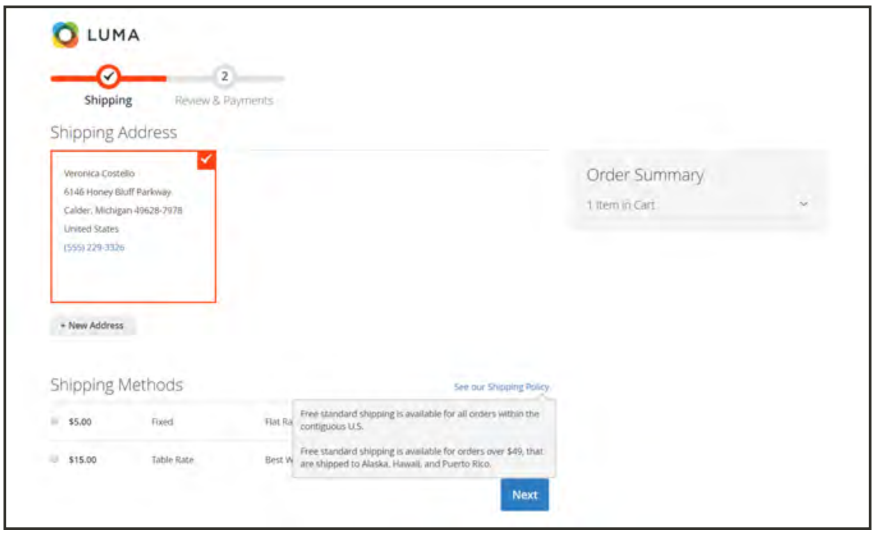


Multiaddress Shipping Options

Shipping Policy

A shipping policy should explain your company's business rules and guidelines for shipments. For example, if you have price rules that trigger free shipping, you can explain the terms in your shipping policy.

To display your shipping policy during checkout, complete the Shipping Policy Parameters in the configuration. The text appears when customers click the “See our shipping policy” link during checkout.



Shipping Policy During Checkout

To configure your shipping policy:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand the **Shipping Policy Parameters** section, and do the following:
   a. Set Apply **Custom Shipping Policy** to "Yes."
   b. Either paste or enter your **Shipping Policy** into the text box.

> If you use a word processor to compose the text, make sure to save the document as a .txt file to remove any control characters from the text. Then, copy and paste the text into the Shipping Policy text box.

Shipping Policy Parameters

4. When complete, tap **Save Config**.

CHAPTER 76:

Basic Shipping Methods

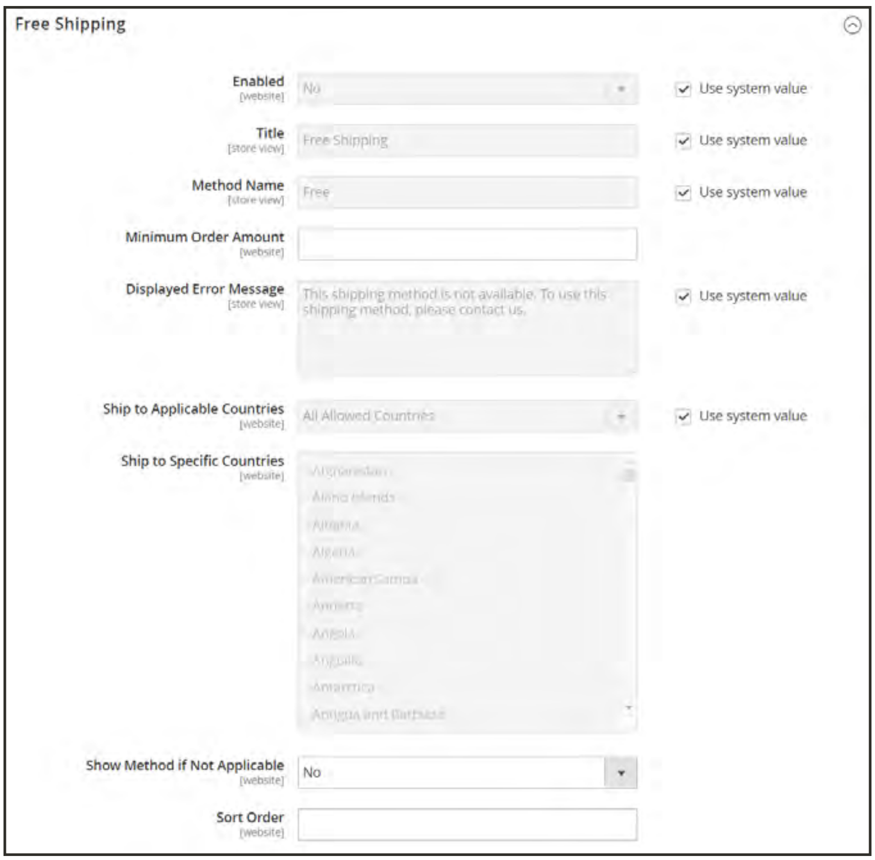
Magento Commerce supports a wide range of shipping methods and carriers. In this chapter you will learn how to set up that shipping methods that do not require an account with a third-party provider.

- Free Shipping
- Flat Rate
- Table Rates
- Dimensional Weight

Free Shipping

Free shipping is one of the most effective promotions you can offer. It can be based on a minimum purchase, or set up as a cart price rule that is applied when a set of conditions is met. If both apply to the same order, the configuration setting takes precedence over the cart rule.

> Check your shipping carrier configuration for any additional settings that may be required for free shipping.



Free Shipping

Step 1: Configure Free Shipping

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand the **Free Shipping** section. Then, do the following:
   a. Set **Enabled** to "Yes."
   b. Enter a **Title** to identify the Free Shipping method during checkout.

c. Enter a **Method Name** to describe this shipping method.

d. Enter the **Minimum Order Amount** to qualify for free shipping.

> To use Free Shipping with Table Rates, make the Minimum Order Amount so high that it is never met. This prevents Free Shipping from going into effect, unless it is triggered by a price rule.

e. In the **Displayed Error Message** box, type the message to appear if free shipping becomes unavailable.

f. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use free shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where free shipping can be used.

g. Set **Show Method if Not Applicable** to one of the following:

Yes	Always shows the Free Shipping method, even when not applicable.
No	Shows the Free Shipping method only when applicable.

h. Enter a **Sort Order** number to determine the position of free shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When complete, tap **Save Config**.

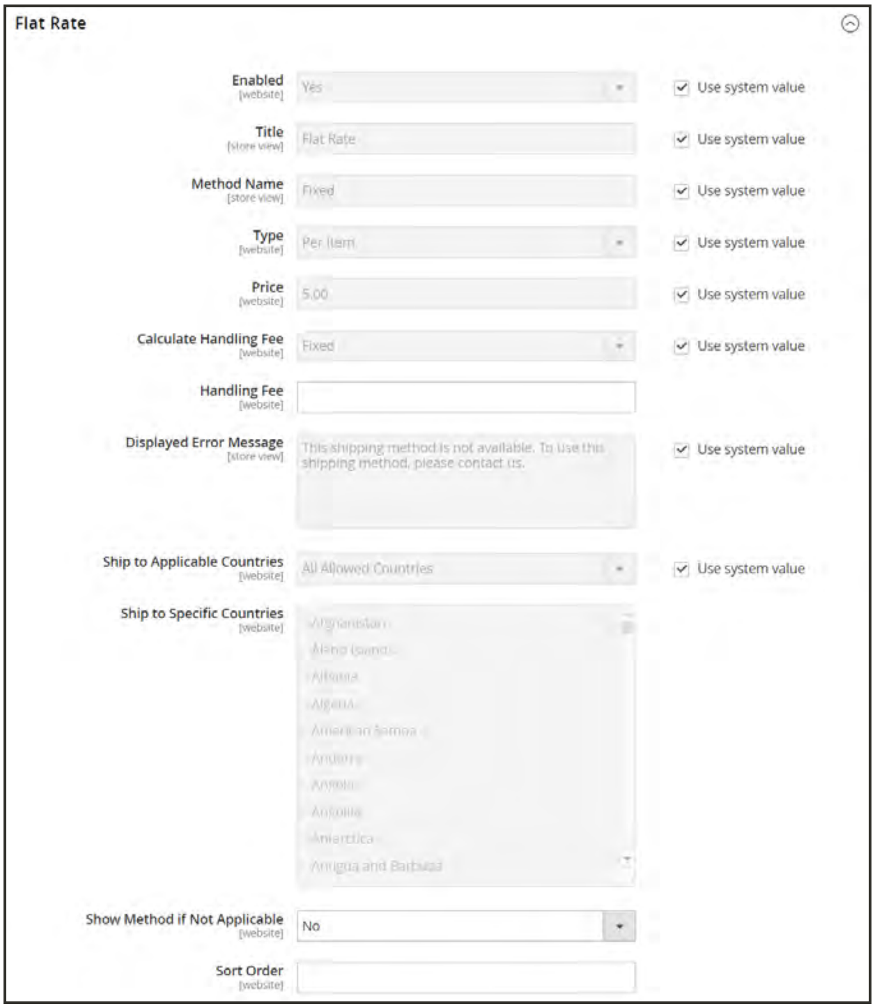
Step 2: Enable Free Shipping in the Carrier Configuration

Make sure to complete any configuration that is required for each carrier that you plan to use for free shipping. For example, if your UPS configuration is otherwise complete, make the following settings to enable and configure free shipping:

1. From the Shipping Methods configuration, click to expand the **UPS** section.
2. Expand the **UPS** section. Then, set **Free Method** to "Ground."
3. To require a minimum order for free shipping, set **Free Shipping with Minimum Order Amount** to "Enable."
4. Enter the required amount in the **Minimum Order Amount for Free Shipping** field.
5. When complete, tap **Save Config**.

Flat Rate

Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple shipping solution, especially when used with the flat-rate packaging that is available from some carriers. When enabled, Flat Rate appears as an option during checkout. Because no specific carrier is specified, you can use a carrier of your choice.



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.”

      If necessary, clear the **Use system value** checkbox to edit for any field to be edited.

   b. Enter the **Title** that you want to appear for table rates section during checkout. (The default title is “Best Way.”)
   c. Enter the **Method Name** that you want to appear as a label next to the calculated rate in the shopping cart.
   d. Set **Condition** to one of the following calculation methods:
      - Weight v. Destination
      - Price v. Destination
      - # of Items v. Destination
   e. For orders that include virtual products, set **Include Virtual Products in Price Calculation** to “Yes” if you want to be able to include the virtual product(s) in the calculation.

      > Because virtual products—such as services—have no weight, they cannot change the result of a calculation that is based on the Weight v. Destination condition. However, virtual products can change the result of a calculation that is based on either the Price v. Destination or # of Items vs Destination condition.

   f. If charging a handling fee, set **Calculate Handling Fee** to one of the following:
      - Fixed
      - Percent

      Then, enter the **Handling Fee** rate according to the method used to calculate the fee.

> If the handling fee is based on a percent, enter the whole number without the percent sign.

g. In the **Displayed Error Message** box, type the message that appears when this method is not available.

h. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from any country specified in your store configuration can use table rate shipping.
Specific Countries	After choosing this option, the “Ship to Specific Countries” list appears. Select each country where customers can use table rate shipping.

i. Enter a **Sort Order** number to determine where table rates appear in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

4. When complete, tap **Save Config**.

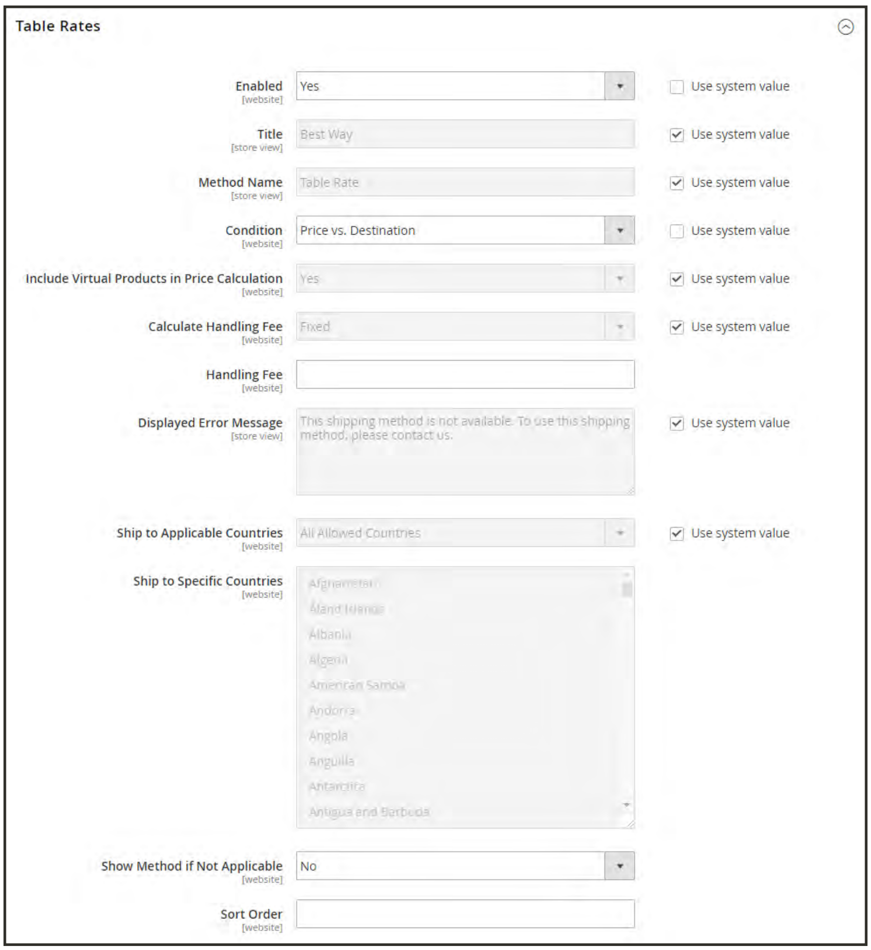


Table Rates

Step 2: Prepare the Table Rate Data

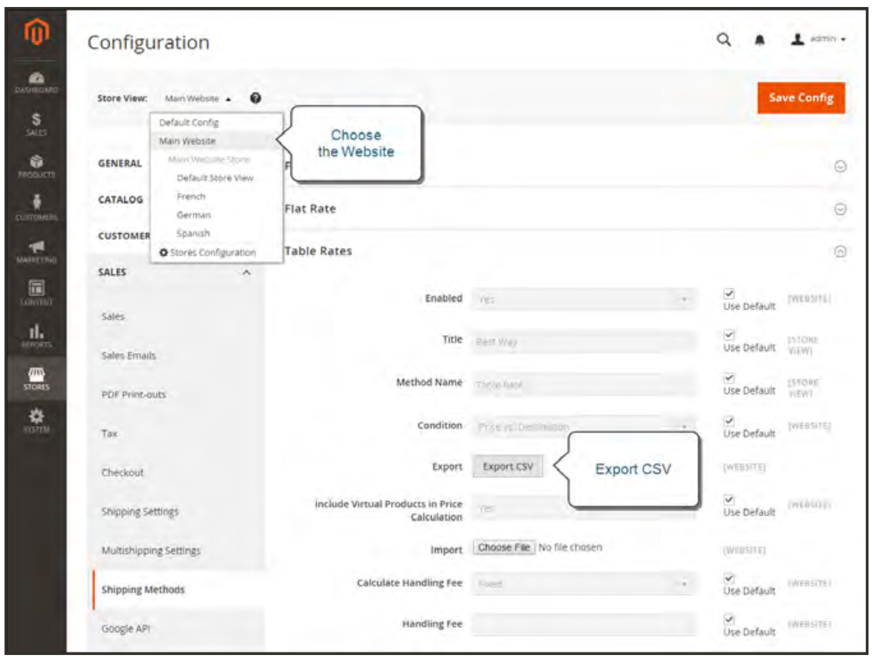
1. In the upper-left corner, set **Store View** to “Main Website,” or to any other website where the configuration applies. When prompted to confirm, tap **OK**.

   The Export and Import options now appear in the Table Rates section, with “Use Default” checkboxes to the right of each option.

   > To change any of the current settings, you must first clear the “Use Default” checkbox next to the field.

2. To change the **Condition**, clear the **Use Default** checkbox. Then, choose another option.

3. Tap **Export CSV**. Then, save the **tablerates.csv** file to your computer.



Export CS

4. Open the file in a spreadsheet. Then, complete the table with appropriate values for the shipping calculation condition.

   - Use an asterisk (*) as a wildcard to represent all possible values in any category.
   - The Country column must contain a valid three-character code for each row.
   - Sort the data by Region/State so the specific locations are at the top of the list, and the wildcard locations at the bottom. This will process the rules with the absolute values first, and the wildcard values later.

	A	B	C	D	E	F
1	Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price	
2	AUS	NT	*	9	39.95	
3	AUS	NT	*	0	19.95	
4	AUS	VIC	*	9	19.95	
5	AUS	VIC	*	0	5.95	
6	AUS	WA	*	9	39.95	
7	AUS	WA	*	0	19.95	
8	AUS	*	*	9	29.95	
9	AUS	*	*	0	9.95	
10						

Weight vs. Destination (Australia)

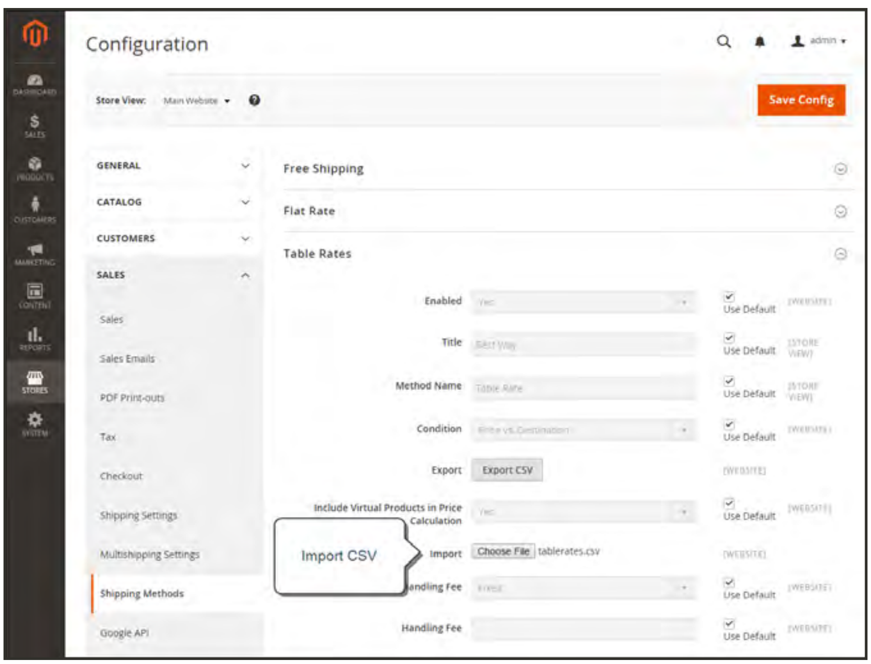
5. When complete, save the **tablerates.csv** file.

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.

Example 1: Price v. Destination

This example uses the Price v. Destination condition to create a set of three different shipping rates based on the amount of the order subtotal for the continental United States, Alaska, and Hawaii. The asterisk (*) is a wildcard that represents all values.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	ORDER SUBTOTAL (and above)	SHIPPING PRICE
USA	HI	*	100	10
USA	HI	*	50	15
USA	HI	*	0	20
USA	AK	*	100	10
USA	AK	*	50	15
USA	AK	*	0	20
USA	*	*	100	5
USA	*	*	50	10
USA	*	*	0	15

Example 2: Weight v. Destination

This example uses the Weight v. Destination condition to create different shipping rates based on the weight of the order.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	WEIGHT (AND ABOVE)	SHIPPING PRICE
AUS	NT	*	9	39.95
AUS	NT	*	0	19.95
AUS	VIC	*	9	19.95
AUS	VIC	*	0	5.95
AUS	WA	*	9	39.95
AUS	WA	*	0	19.95
AUS	*	*	9	29.95
AUS	*	*	0	9.95

Example 3: Restrict Free Shipping to the Continental United States

1. Create a `tablerates.csv` file that includes all the state destinations to which you are willing to provide free shipping.
2. Complete the table rate configuration with the following settings:

SETTING	VALUE
Condition	Price v. Destination
Method Name	Free Shipping
Ship to Applicable Countries	Specific Countries
Ship to Specific Countries	Select only United States
Show method if not applicable	No

3. Set **Store View** to the main website. Then, tap **Import** to import the `tablesrates.csv` file.

Dimensional Weight

Dimensional weight, sometimes called volumetric weight, is a common industry practice that bases the transportation price on a combination of weight and package volume. In simple terms, dimensional weight determines the shipping rate based on the amount of space a package occupies in the cargo area of the carrier. Dimensional weight is typically used when a package is relatively light compared to its volume.

All major carriers apply dimensional weight to some shipments. However, the manner in which dimensional weight pricing is applied varies from one carrier to another.

We recommend that you use Magento Shipping to calculate dimensional weight for all carriers.If your company has a high volume of shipments, even a slight difference in shipping price can translate to thousands of dollars over the course of a year.

CHAPTER 77:

Magento Shipping

Magento Shipping is a multi-carrier shipping and fulfillment solution that combines intelligent automation capabilities, access to global carrier networks, and seamless integration with the Magento Admin. Our technology partner, Temando, provides the engine that powers this technology to deliver the following benefits:

- Provides accelerated revenue growth, and boost business efficiency.
- Manages multiple carriers from a single, integrated portal.
- Automatically checks for conflicts with extensions during setup to help avoid issues during development and testing.
- Simplifies ongoing maintenance by automatically including new carriers and features without having to update.
- Integrates with Magento Order Management.

At this time, Magento Shipping is available in the United States, United Kingdom, and Australia.

Changes in the Latest Release

Release 2.2.5

New Feature

- Click & Collect (Collection Point Locations)
  Customers can choose to have a carrier deliver to a designated drop point.

Other Enhancements

- Core Returns
  Select carriers to use for returns, and send return label along with forward fulfillment.
- Batch Processing MVP
  Easier to batch-process large shipments.
- Improved pagination in Admin
- Multi-version API

Quick Look

Advanced Shipments

Create shipments with advanced features, including route and package information with dimensional weight, carrier quotes, international details with required export information, harmonization codes, shipping documents and labels, delivery instructions, and tracking information.

Locations

Configure multiple warehouses, distribution centers, retail stores, dropshippers, and third-party logistics. Allocate shipments to any supported fulfillment location.

Click & Collect

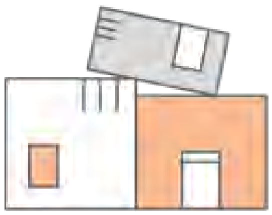
Offer the convenience of ordering online, with convenient customer pickup at a nearby location.

Dispatches

Book shipments with all carriers, and maintain a manifest of scheduled pickup with selected carriers.

Shipping Partners

Receive real-time rates from global carriers, and configure multiple accounts with the same carrier across multiple locations. Access prenegotiated rates for selected carriers, or create your own negotiated rates in selected markets.



Packaging

Manage package names and dimensions, and access carrier supplied packaging information.

Shipping Experience Rules

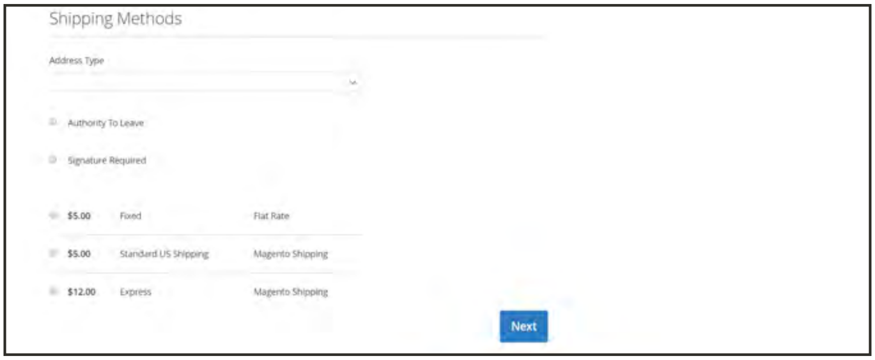
Custome

Automate the shipping and fulfillment processes based on a variety of factors, including inventory levels, proximity to destination, product type, shipping costs, ETA, carrier, packaging, and more.

From the storefront, Magento Shipping options appear during the first step of the checkout process. Magento Shipping can be configured to show all options, or only the ones that apply to the order.

Shipping Methods

During checkout, the shopper identifies the address type as a residence or business, and specifies whether the carrier must obtain a signature, or can leave the package at the door. Finally, the shopper chooses the preferred shipping rate and carrier to be used for the order.



Shipping Rate and Carrier

Click & Collect

If Collection Points are enabled in the configuration, specific locations can be specified as Click & Collect fulfillment centers where the order can be sent for customer pick up. During checkout, the customer chooses the most convenient collection point based on Country and Postal Code. The customer is notified when the order is ready for pick up at the collection point.

Collection Point Selection

Returns

When creating a return shipment, you can generate a list of shipping quotes, and choose the carrier that you want to use. The return label can be included in the original shipment.

Shipping Quotes for RMA Request

Setting Up Magento Shipping

Magento Shipping is initially available by request. To be considered for early access, click the Request Shipping Account link in the Magento Shipping configuration.

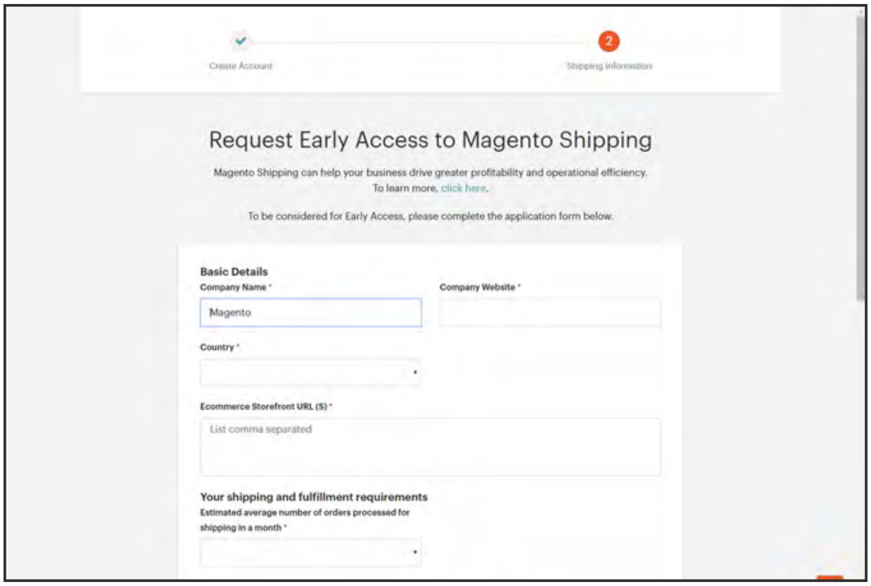
When enabled, Magento Shipping adds a Dispatch option to the Magento Sales menu, a Shipping section to the Stores menu, and new sections of detailed information in each shipment. In the storefront, the selection of available Magento Shipping options appears during checkout.

Step 1: Sign Up for Magento Shipping

1. On the Admin sidebar under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand the **Magento Shipping** section. Then, do one of the following:
   - If you have a Magento account, click **Request Shipping Account**.
   - If you don't yet have a Magento account, complete the sign-up form. Then, tap **Continue**.

   To access the Magento Shipping Portal, you must have both a Magento account and a Magento Shipping account. Your access to Magento Shipping is based on your Magento account ID.
4. Click **Request Shipping Account**. Then, do the following:
   a. Complete the **Early Access to Magento Shipping** form.
   b. Click the link in the confirmation email to verify your account. Then, click the link to continue where you left off.
   c. After a new browser tab opens to your Magento account, return to your previous browser tab to complete the remaining information. Then, complete the remaining information, and **Submit**.

   You will receive an email with additional instructions within the next 48 hours.



Early Access to Magento Shipping

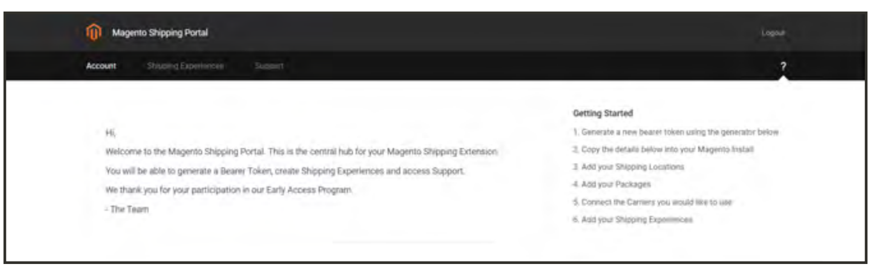
Step 2: Generate Your API Tokens

1. When you receive the confirmation email, open a tab to a separate browser window, and log in to your **Magento Shipping** account.

   You should now have an open tab to your Magento configuration, and another to your Magento Shipping account. Information from your Magento Shipping account will later be pasted into the Magento Shipping configuration in the Admin

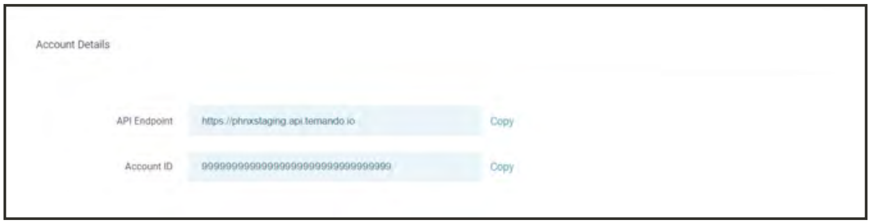
2. Take a moment to read the **Getting Started** steps.

3. In the header, click the **question mark** (?) to hide the Welcome message and Getting Started steps.



Magento Shipping Portal

4. The **Account Details** section shows your **API Endpoint** and **Account ID**. This information will later be copied and pasted into your Magento configuration.



Account Details

5. A unique **API token** is used to identify the connection between your Magento website and your Magento Shipping account.

   In the API Tokens section, tap **Generate Token** for the type of token that you need.

Production API Token	Generates the API token that is needed to use Magento Shipping in production mode.
Test API Token	Generates an API token that is needed to use Magento Shipping in test mode.

   For a first-time setup, choose **Test API Token**. When you are ready to "go live" with Magento Shipping, you can use the Production API Token. In the next step you will paste the token into the Magento configuration.

API Tokens

Step 3: Activate Magento Shipping

Return to the browser tab with the **Magento Shipping** configuration, and do the following:

1. Set **Enabled** to "Yes."

2. Enter the **Title** that you want to use for Magento Shipping.

3. By default, only API errors are logged. If you prefer to log all API communication, set **Enable API Logging** to "Yes."

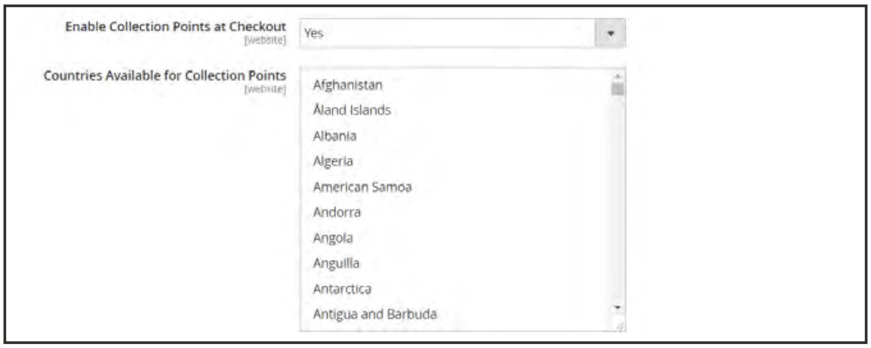
4. Paste the following credentials from your Magento Shipping account. You will need to return to the browser tab that is open to Magento Shipping, and copy and paste each into the Magento configuration.

- API Endpoint
- Account ID
- API Token

> To run Magento Shipping in a testing environment, make sure to generate and copy the test token, rather than the production token.

5. If your store offers return merchandise authorization, set **Enabled for RMA** to "Yes."

6. To give customers the option to have the shipment delivered to a designated drop point other than the standard "ship to" address, set **Enable Collection Points at Checkout** to "Yes." Then, choose each country where such alternate collection points are to be available. (Hold down the Ctrl key and click each country.)



Enable Collection Points at Checkout

7. Complete the following settings as needed.

   a. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use Magento Shipping.
Specific Countries	Select each country in the list where Magento Shipping can be used.

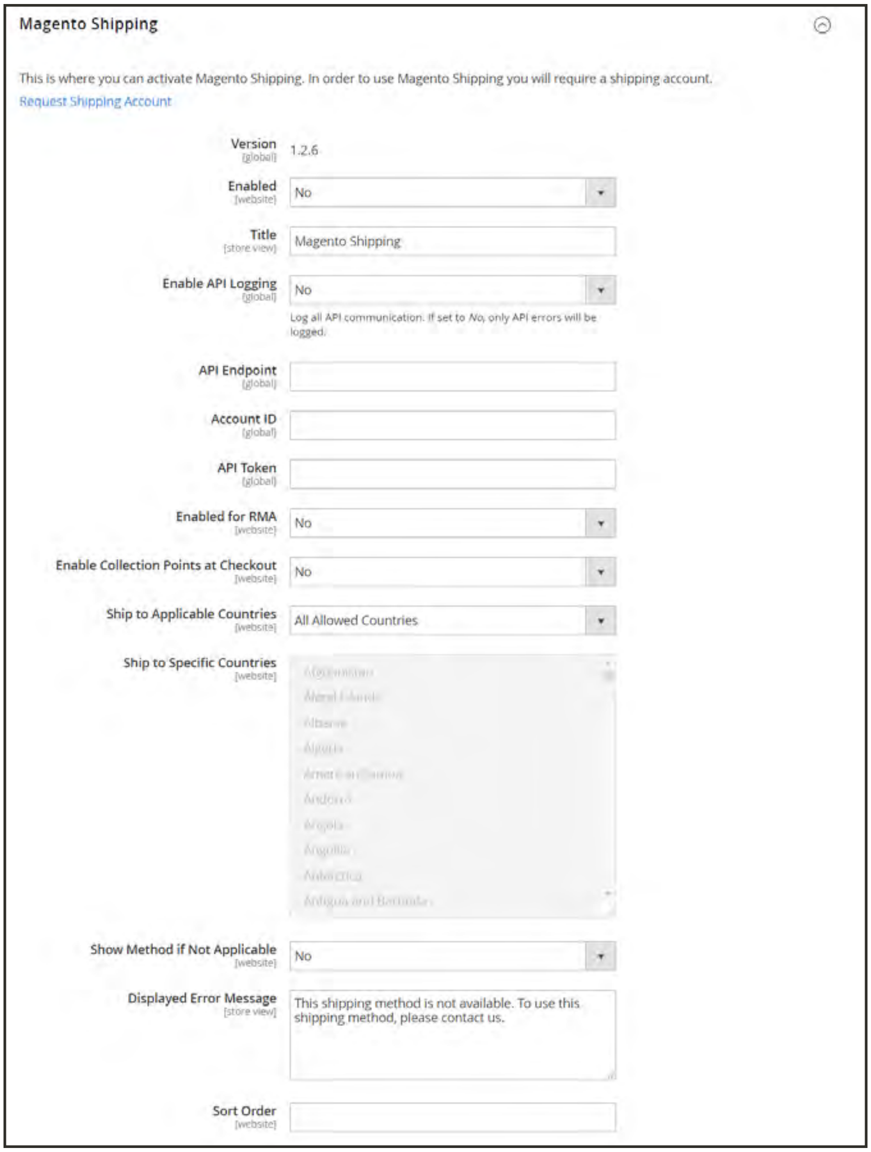
   b. Set **Show Method if Not Applicable** to one of the following:

Yes	Always shows the Magento Shipping method, even when not applicable.
No	Shows the Magento Shipping method only when applicable.

   c. In the **Displayed Error Message** box, type the message to appear if Magento Shipping becomes unavailable.

   d. Enter a **Sort Order** number to determine the position of Magento Shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

8. When complete, tap **Save Config**.



Magento Shipping

Step 4: Complete the Remaining Settings

The following configuration settings can be completed now, or at a later time.

Checkout View Settings

The Checkout View Settings determine the options that appear as “add ons” during checkout.

Magento Shipping Options During Checkout

1. To complete the **Checkout View Settings**, tap **Configure**.

Configure Checkout View Settings

2. Mark the checkbox of each option that you want to appear during checkout. Then, complete the information in each section as needed.

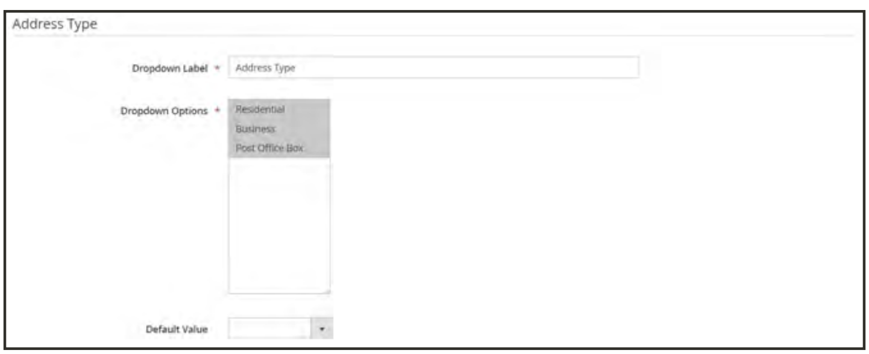
Checkout View Settings

3. In the **Address Type** section, do the following:

   a. Enter the text that you want to use as the **Dropdown Label** for the Address Type options during checkout.

   b. In the **Dropdown Options** list, select each option that you want to include as an address type.

   c. Select the option that you want to be used as the **Default Value**.



Address Type

4. In the **Authority to Leave** section, enter the **Checkbox Label** for the option.

Authority to Leave

5. In the **Signature Required** section, enter the **Checkbox Label** for the option.

Signature Required

6. When complete, tap **Save**.

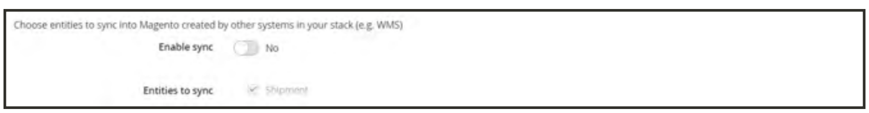
Advanced Settings

1. To configure the **Advanced Settings**, tap **Configure**. Then, do the following:

Configure Advanced Settings

2. To synchronize Magento with other systems in your stack, set **Enable sync** to "Yes."

3. To synchronize shipment entities, mark the **Shipment** checkbox.

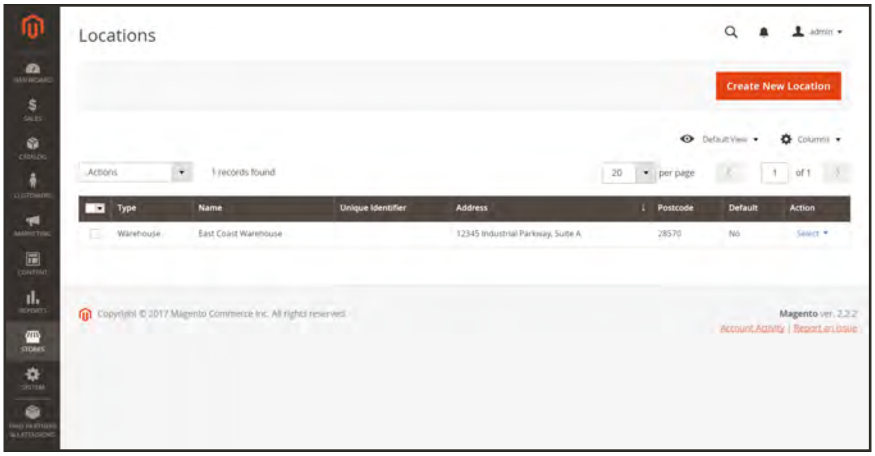


Advanced Settings

4. When complete, tap **Save Config**.

Locations

The Locations grid lists the available shipping locations, and can include stores, warehouses, drop shippers, and company headquarters. Existing shipping locations can be edited or removed, and new shipping locations added. The locations that you enter appear in a drop-down list for each Shipping Partner profile, to identify the locations where the carrier is available.



Locations

To add a new shipping location:

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Locations**.

2. Tap **Create New Location**. Then, do the following.

   a. Enter the **Location Name**, as you want it to appear throughout Magento Shipping.

   b. Set the location **Type** to one of the following:

      - Store
      - Warehouse
      - Drop Shipper
      - Headquarters

   c. To enable collection points, set **Enable Click & Collect** to "Yes."

Basic Settings

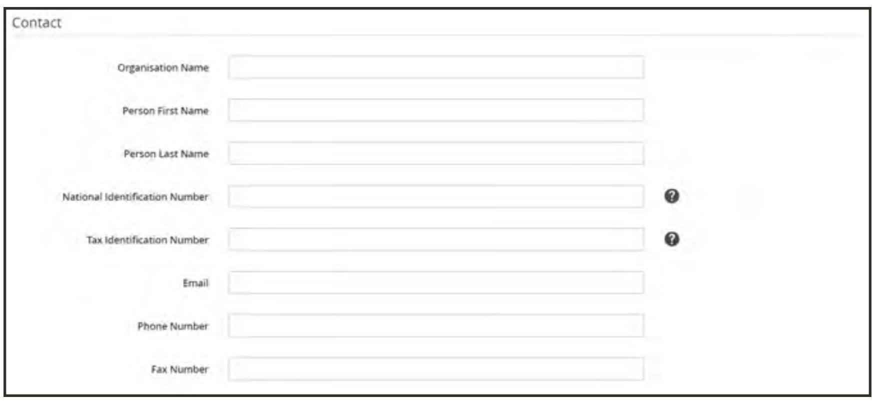
3. Complete the fields in the **Address** section. If you need help, click the Help ( ) button, or refer to the Field Descriptions at the end of this topic.

4. In the **Locality** field, enter an additional descriptive name to describe the location, such as the name of the neighborhood, small town, or suburb.

5. See the Latitude/Longitude FInder to get the GPS coordinates of the location. Then, enter the **Latitude** and **Longitude** coordinates.

Address

6. Complete the fields in the **Contact** section. If you need help, click the Help ( ) button, or refer to the Field Descriptions at the end of this topic.



Contact

7. When complete, tap **Save Config**.

Field Descriptions

FIELD	DESCRIPTION
Location Name	The name that is used to refer to the shipping location throughout the Admin and storefront.
Type	Identifies the type of facility. Options: Store Warehouse Drop Shipper Headquarters
Enable Click & Collect	Determines if the location can be used as a collection point for Click & Collect fulfillment. Options: Yes / No.
ADDRESS	
Type	Identifies the type of address. Options: Business/Residential
Country	The country where the shipping facility is located.
Address Line 1	The street address of the shipping location.
Address Line 2	Additional street address information, if needed.
City	The city where the shipping facility is located.
State / Province	The state or province where the shipping facility is located.
Zip / Postal Code	The ZIP or postal code where the shipping facility is located.
Dependent Locality	An additional description of the location, such as the name of a small town or suburb.
Longitude	The GPS longitude coordinate of the shipping facility. Use the Latitude/Longitude Finder to get the GPS longitude coordinate of your location.
Latitude	The GPS latitude coordinate of the shipping facility. Use the Latitude/Longitude Finder to get the GPS latitude coordinate of your location.
CONTACT	
Organisation Name	The name of the organization that is associated with the shipping location.
Person First Name	The first name of the primary contact at the shipping location.

Field Descriptions (cont.)

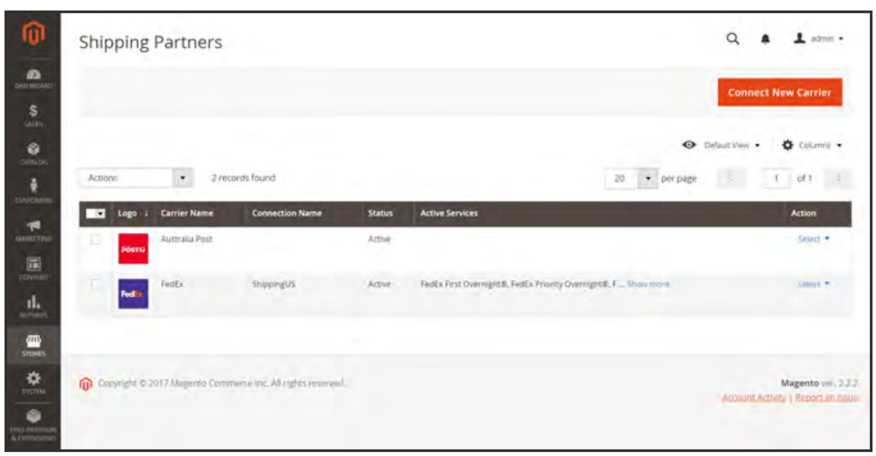
FIELD	DESCRIPTION
Person Last Name	The last name of the primary contact at the shipping location.
National Identification Number	The National Identification Number of the contact organization, if applicable. For example, the INSEE code (France).
Tax Identification Number	The Tax Identification Number assigned to the contact organization, if applicable. For example, TFN (Australia), TIN (France).
Email	The email address of the primary contact at the shipping location.
Phone Number	The telephone number of the shipping location.
Fax Number	The fax number of the shipping location.

Shipping Partners

Carrier profiles for Magento Shipping are managed from the Stores menu. New connections to carriers can be added, and existing connections can be edited or deleted from the Shipping Partners grid.

Magento Shipping supports FedEx pre-negotiated rates, and ad-hoc returns for FedEx, USPS, Australia Post, UK Mail, and DHL Express.

At this time, Magento Shipping is available to merchants in the U.S., UK, and Australia only.

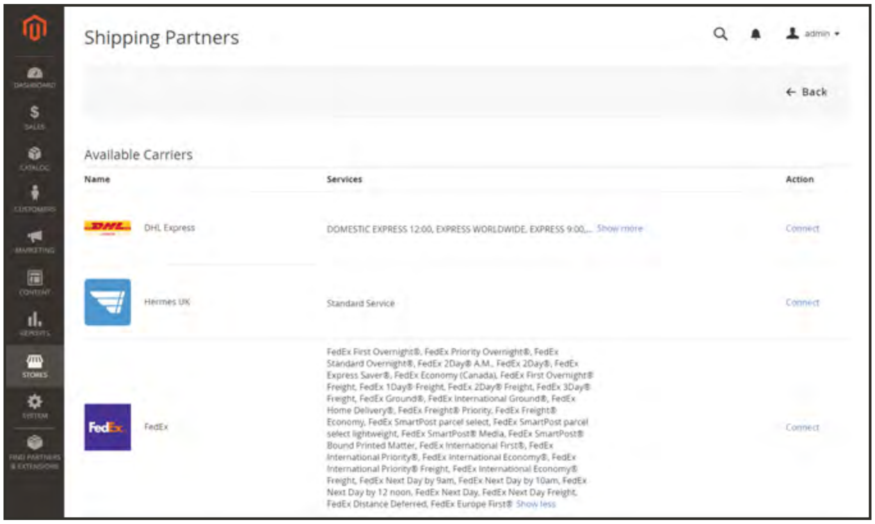


Shipping Partners

To add a new carrier:

1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Carriers**.
2. Under **Available Carriers**, find the shipping partner that you want to add. For a description of services, click **Show more**.

3. To complete the setup, click **Connect**.

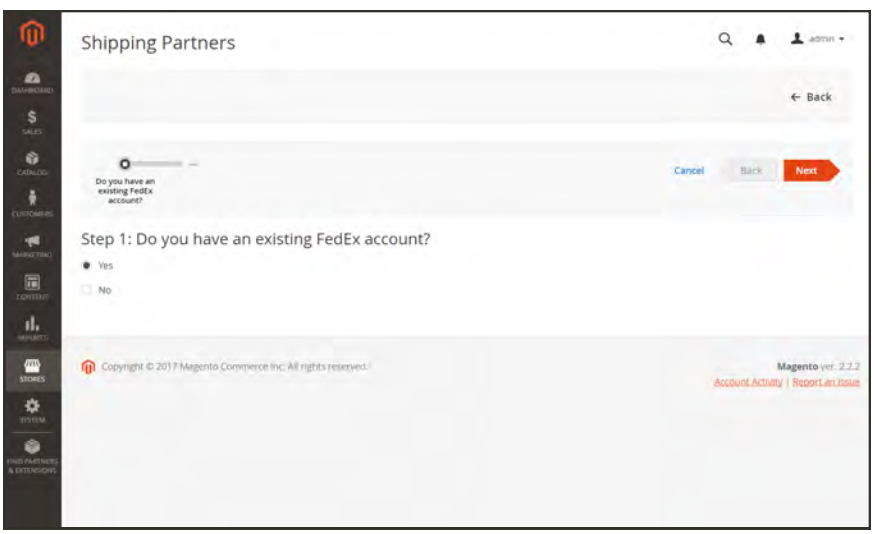


Shipping Partners

4. Complete each step as follows. Your progress is tracked at the top of the page.

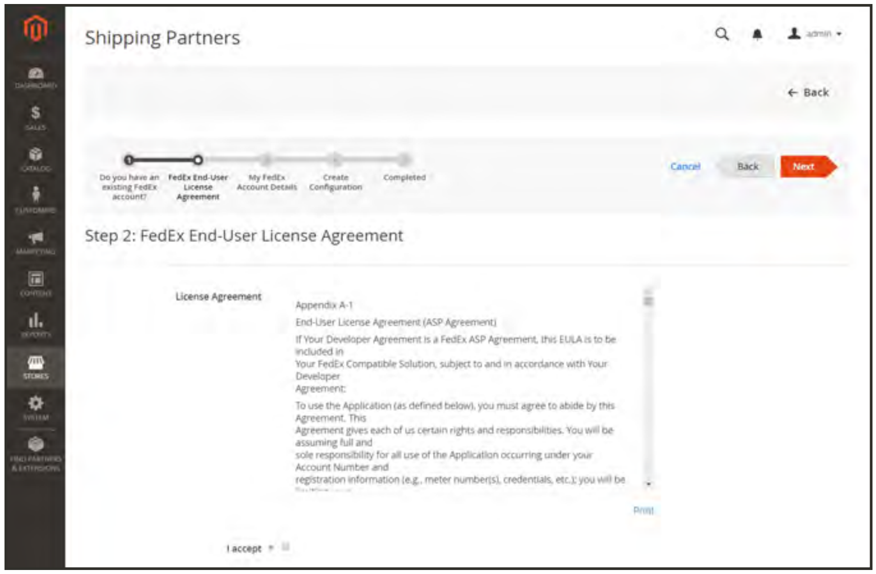
   a. Under **Step 1**, choose "Yes" if you have an account with the carrier. Then, tap **Next**.

   If you do not have an account, you will be instructed to contact the carrier. When your account is ready, return to this step and continue.



Step 1

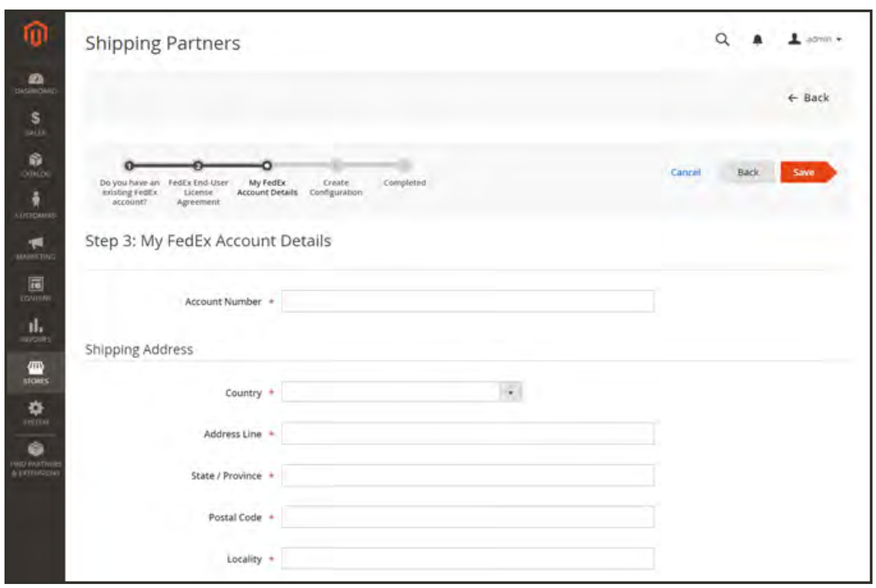
   b. Some carriers require that you accept the terms of a license agreement. If applicable, read the **License Agreement**. To continue, mark the **I accept** checkbox, and tap **Next**.



Step 2

c. Under **Step 3**, enter your carrier **Account Number**. Then, complete the information in the **Shipping Address** and **User Contact and Address** sections. This information must match the information in your carrier account.

> In the **Locality** field, enter the city.



Step 3

To edit an existing carrier:

1. Find the carrier in the Shipping Partners grid. Then in the **Action** column, select **Configure**.
2. Make the necessary changes to the carrier profile.

3. When complete, tap **Save**.

Field Descriptions

FIELD	DESCRIPTION
Carrier Connection Nickname	The name that is used for the carrier during checkout.
Locations	Identifies each shipping location that can be used by the carrier.
Services	Identifies each shipping service that is provided by the carrier.

Packaging

The Packaging grid lists the available packaging options that are available through your store. Existing packaging profiles can be edited or removed, and new packaging profiles added. The packaging options appear in a dropdown for each Shipping Partner profile, and identify each type of packaging that is supported by the carrier.

Packaging

To add a package:

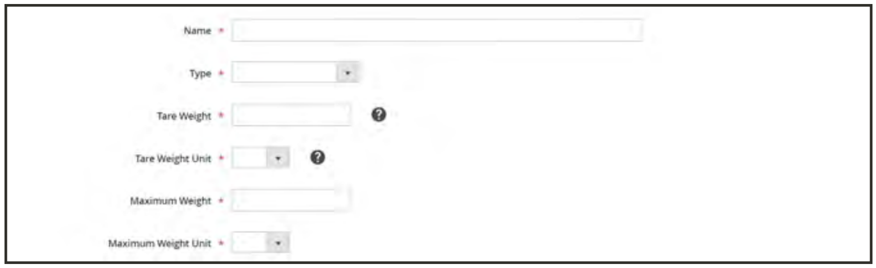
1. On the Admin sidebar, choose **Stores**. Then under **Shipping**, choose **Packaging**. Then, do the following:

   a. Enter the **Name** of the package.

   b. Choose the package **Type**.

   c. In the **Tare Weight** field, enter the weight of the empty package. Then, set **Tare Unit** to the unit of measurement that is used for the Tare Weight value.

   d. Enter the **Maximum Weight** that can be placed in the package. Then, set **Maximum Weight Unit** to the unit of measurement that is used for the Maximum Weight value.



Basic Settings

2. Complete the fields in the **Outer Dimensions** section. If you need help, click the Help ( ) button, or refer to the Field Descriptions at the end of this topic.

Outer Dimensions

3. Complete the fields in the **Inner Dimentions** section. If you need help, click the Help ( ) button, or refer to the Field Descriptions at the end of this topic.

Inner Dimensions

4. When complete, tap **Save Config**.

Field Descriptions

FIELD	DESCRIPTION
Name	The name of the packaging type.
Type	Describes the basic packaging type. Options: Box Carton Crate Cylinder

Field Descriptions (cont.)

FIELD	DESCRIPTION
	Document Envelope Flat Pack Letter Pallet Parcel Satchel/Bag Other
Tare Weight	The weight of the empty container that is used to calculate the shipment load when added to content weight.
Tare Weight Unit	The unit of measurement that is used to describe tare weight. g Gram oz Ounce kg Kilogram lb Pound
Maximum Weight	The maximum weight allowed for this packaging type.
Maximum Weight Unit	The unit of measurement that is used to describe the maximum weight. g Gram oz Ounce kg Kilogram lb Pound
OUTER DIMENSIONS	
Length	The package length when measured from the outside.
Width	The package width when measured from the outside.
Height	The package height when measured from the outside.
Unit	Determines the unit of measurement for the outer dimensions of the package. Options:

Field Descriptions (cont.)

FIELD	DESCRIPTION
	cm Centimeter in Inch m Meter mm Millimeter ft Foot
INNER DIMENSIONS	
Length	The package length when measured from the inside.
Width	The package width when measured from the inside.
Height	The package height when measured from the inside.
Unit	Determines the unit of measurement for the inner dimensions of the package. Options: cm Centimeter in Inch m Meter mm Millimeter ft Foot

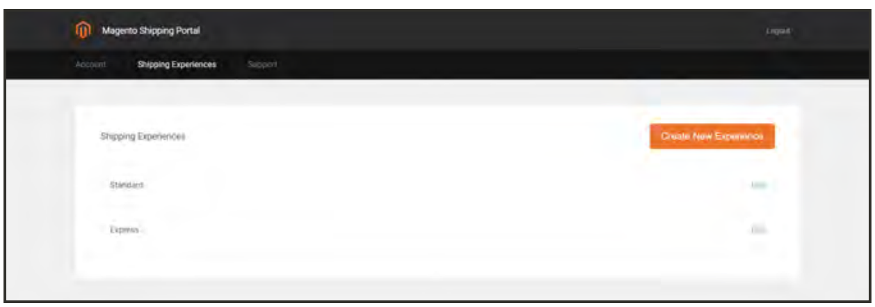
Shipping Experience Rules

The Shipping Experiences tab of the Magento Shipping Portal allows you to create rules to automate the shipping process. You can create the following types of rules:

Qualification	Qualification rules control the availability of the rule. For example, you can add conditions that determine when the shipping method becomes available, and set the shipping charge.
Quoting	Quoting rules control the list of available carriers that appears when you get quotes for a shipment.

To create a shipping experience rule:

1. Sign in to the **Magento Shipping Portal**.
2. Choose the **Shipping Experiences** tab. Then, tap **Create New Experience**.

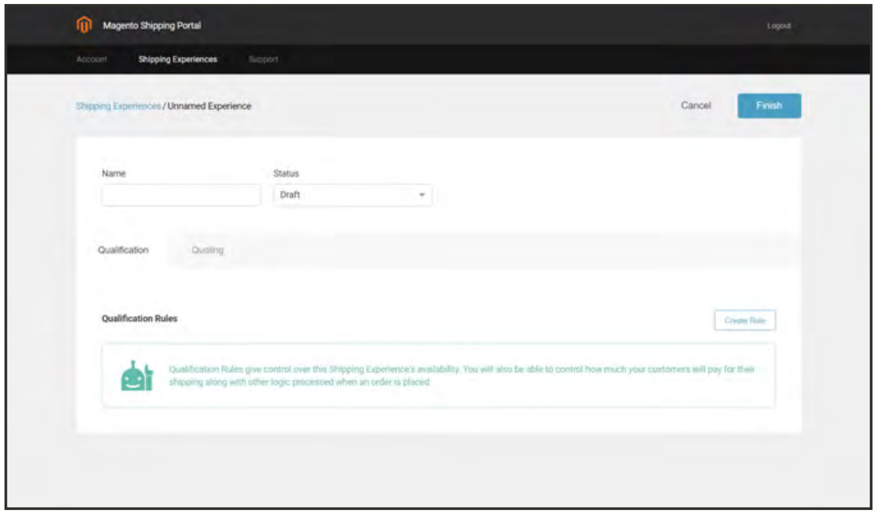


Shipping Experiences

3. Enter a **Name** for the rule.
4. For now, accept the default **Status** of “Draft.”

   When you are ready to “go live” with the rule in your store, you can change the Status to “Production.”

5. Click the tab for the type of experience that you want to create:
   - Qualification
   - Quoting
6. Tap **Create Rule**. Then, follow the instructions for the type of rule:



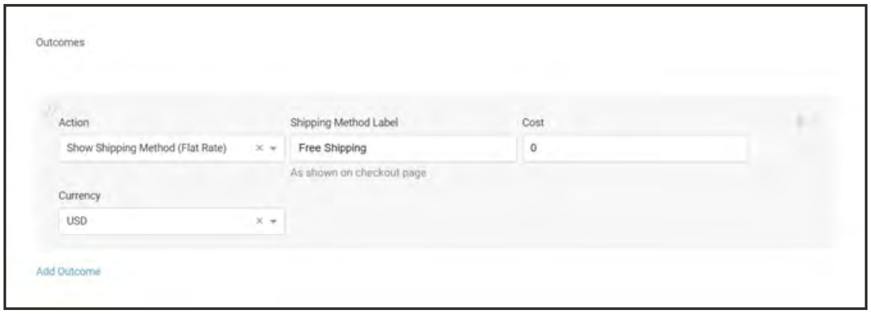
New Experience

Qualification Rule

1. Enter a brief **Description** of the rule.
2. Click **Add Condition**. Then, do the following:
   a. Set **Input** to the shipping parameter that the condition is based upon.
   b. Choose the **Operator** that is needed to describe the condition.
   c. Enter the **Value** that is needed to complete the condition.
   d. To add another condition, click **Add Condition**. Then, repeat these steps.

Conditions

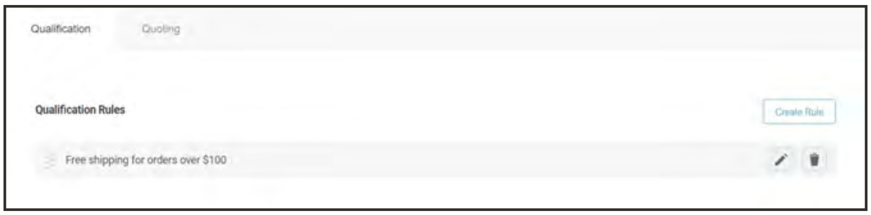
3. In the **Outcomes** section, do the following:
   a. Choose the **Action** that is applied when the conditions are met.
   b. Enter the **Shipping Method Label** that appears during checkout.
   c. Choose the **Currency** to be used to display the shipping charge.
   d. To add an additional action, click **Add Outcome**.



Outcomes

4. When complete, tap **Save**.

   The description of the new rule appears in the list of Qualification Rules on the Qualification tab.



Qualification Rules

5. Tap **Finish** to return to the Shipping Experiences tab.

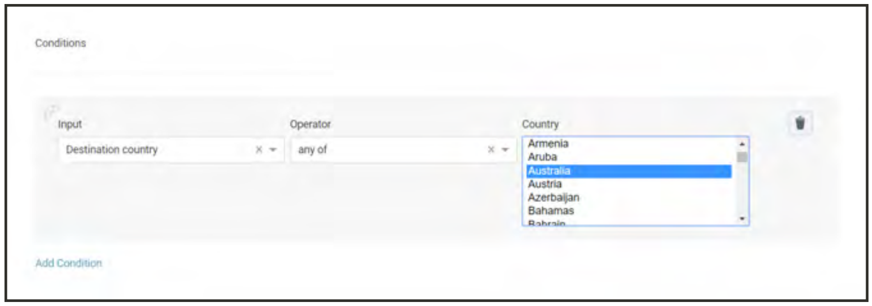
Quoting Rule

1. Enter a brief **Description** of the rule.
2. Click **Add Condition**. Then, do the following:
   a. Set **Input** to one of the following parameters:
      - Destination Country
      - Destination Postal Code

   b. Choose the **Operator** that is needed to describe the condition.

   c. Select each **Country** or **Postal Code** that is needed to complete the condition.

   d. To add another condition, click **Add Condition**. Then, repeat these steps.



Conditions

3. In the **Outcomes** section, do the following:

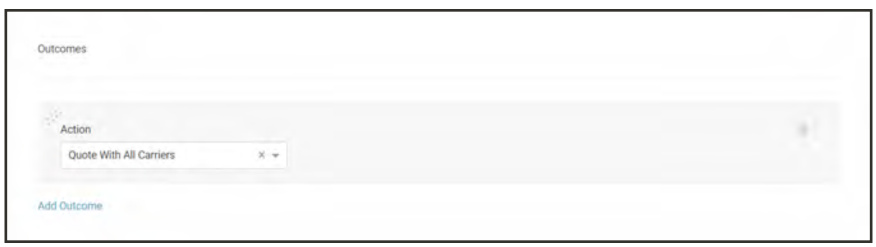
   a. Choose one of the following **Action** to apply when the conditions are met:

Quote with All Carriers	The rule applies to all available carriers.
Quote with Carrier Services	Allows you to choose specific carriers to be available for the rule.

   b. Enter the **Shipping Method Label** that appears during checkout.

   c. Choose the **Currency** to be used to display the shipping charge.

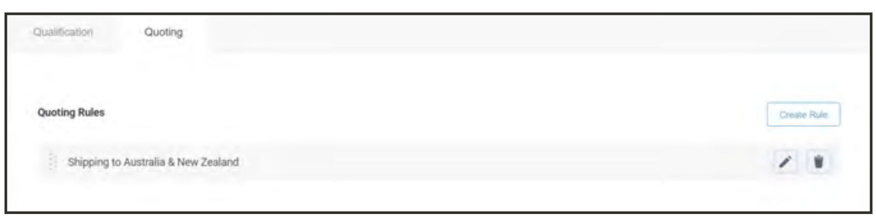
   d. To add an additional action, click **Add Outcome**.



Outcomes

4. When complete, tap **Save**.

The description of the new rule appears in the list of Quoting Rules on the Quoting tab.



Quoting Rules

5. Tap **Finish** to return to the Shipping Experiences tab.

Troubleshooting

The following issues have been identified in this release of Magento Shipping.

Currency Conversion

Issue	Currency conversion problem for shipping methods during checkout when store supports multiple currencies.
Workaround	Follow these best practices to ensure that the experience currency, base currency, and display currency are the same: • The Magento base currency is the same as the experience currency. • The Magento currency rates are the same as the experience and base currency.

Shipping Experience Rules

Issue	When a user chooses a shipping method during checkout, Magento might select two shipping methods.
Workaround	Make sure that only one rule with a “Show Shipping Method” outcome can be applied to a single scenario. Consider these example rules:

Rule 1:	`Show 'Free Shipping' for Country is Canada and Cost is not greater than $99.99`
Rule 2:	`Show 'Free Shipping' for Country is not Canada and Cost is greater than $100`

CHAPTER 78:

Carriers

If you have a commercial account with a supported carrier, you can offer your customers the convenience of choosing that carrier during checkout. The rates are automatically downloaded, so you do not need to look up the information.

Before you can offer your customers a selection of shipping carriers, you must first complete the shipping settings to establish the point of origin for your store. Then, complete the configuration for each carrier service that you want to offer. The configuration options vary for each carrier. However, all require that you first open a shipping account with the carrier, and enter your account number or user ID, and the gateway URL to their system into the configuration of your store. See Magento Connect for additional shipping services for your Magento Commerce installation.

See the online user guide for step-by-step configuration instructions for the following carriers:

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

USPS

The United States Postal Service is the independent postal service of United States government. USPS offers domestic and international shipping services by land and air.

FedEx

Offers domestic and international shipping services by land and air to more than 220 countries.

DHL

Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

CHAPTER 79:

Shipping Labels

Magento Commerce includes a high level of integration with major shipping carriers, which gives you access to carrier shipping systems to track orders, create shipping labels, and more. Shipping labels can be created for regular shipments and products with return merchandise authorization. In addition to the information provided by the shipping carrier, the label also includes the Magento order number, number of the package, and the total quantity of packages for the Magento shipment.

USPS Priority Shipping Label

Shipping Label Workflow

Shipping labels can be produced at the time a shipment is created, or later. Shipping labels are stored in PDF format and are downloaded to your computer.

1 **Administrator submits shipping label request.** The store Administrator completes the information necessary to generate labels, and submits the request.

2 **Request sent to carrier.** Magento contacts the shipping carrier, and creates an order in the carrier's system. A separate order is created for each package that is shipped.

3 **Carrier sends label and tracking number.** The carrier sends the shipping label and tracking number for the shipment.

- A single shipment with multiple packages receives multiple shipping labels.
- If you generate the same shipping labels multiple times, the original tracking numbers are preserved.
- For returned products with RMA numbers, the old tracking numbers are replaced with new ones.

4 **Administrator downloads and prints the label.** After the shipping label is generated, the new shipment is saved and the label can be printed. If the shipping label cannot be created due to problems with the connection or any other reason, the shipment is not created.

Depending on your browser settings, the PDF file can be opened and printed. Each label appears on a separate page in the PDF.

Configuring Shipping Labels

The following settings must be made at the product level, as well as in the configuration of each carrier that is used to print labels. To print labels, all carriers require that you open an account. Then, complete the configuration in your store for each carrier that you plan to use.

Step 1: Verify the Country of Manufacture

The country of manufacture is required for all products that are shipped internationally by USPS and FedEx, If you have many products that need to be updated, you can either import the updates, or use the Inventory grid to update multiple records.

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.

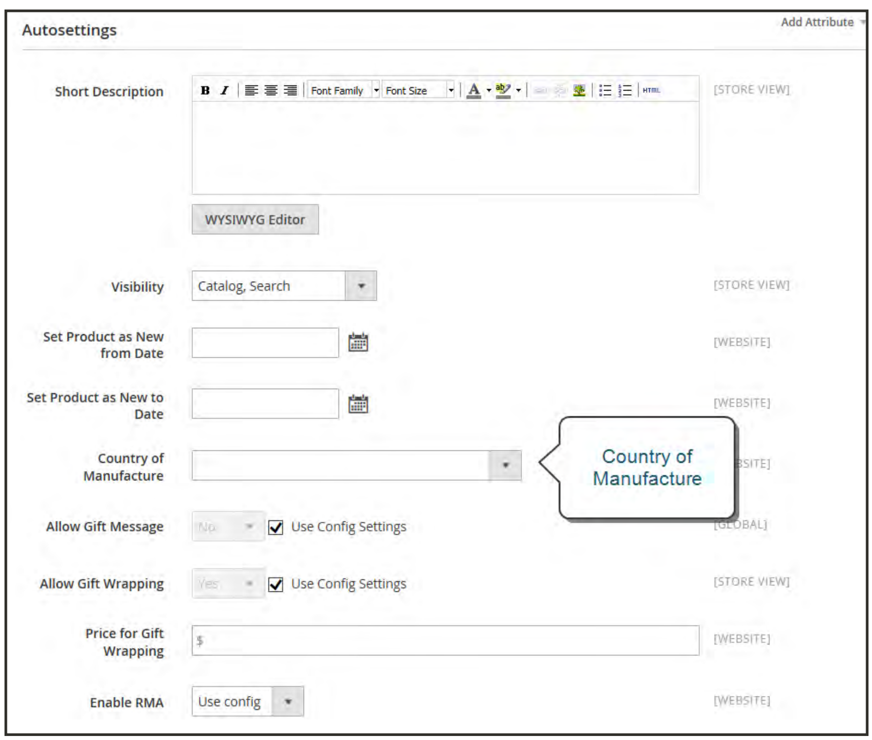
Method 1: Update a Single Record

a. In the grid, find the product to be updated, and open in edit mode.

b. In the panel on the left under **Advanced Settings**, choose **Autosettings**.

c. Update the **Country of Manufacture** field.

d. When complete, tap **Save**.



Country of Manufacture

Method 2: Update Multiple Records

a. In the grid, mark the checkbox of each product to be updated. For example, all products that are manufactured in China.

b. Set the **Actions** control to "Update Attributes." Then, tap **Submit**.

c. In the **Update Attributes** form, find the **Country of Manufacture** field and mark the **Change** checkbox. Then, choose the country.

d. When complete, tap **Save**.

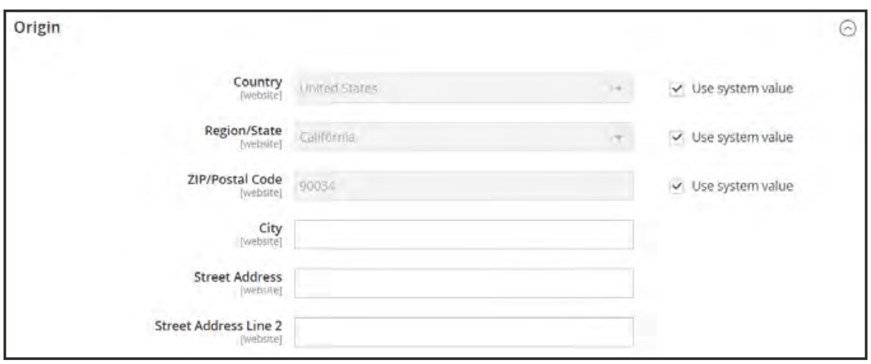
Step 2: Verify the Store Information

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left, under **Sales**, choose **Shipping Settings**. then, do the following:

   a. Expand the **Origin** section, and verify that the following fields are complete:

Street Address	The street address of the place from which shipments are sent. For example, the location of your company or warehouse. This field is required for shipping labels.
Street Address Line 2	Any additional address information, such as the floor, entrance and so on. We strongly recommend that you use this field.



Origin

   b. In the panel on the left under **Sales**, choose **Shipping Methods**. Then, expand the **USPS** section, and verify that the following fields are complete:

Secure Gateway URL	Magento automatically enters the gateway URL.
Password	The password is provided by USPS, and gives you access to their system through Web Services.
Length, Width Height, Girth	The default dimensions of the package. To make these fields appear, set Size to "Large."

c. Expand the **FedEx** section, and verify that the following fields are complete:

- Meter Number
- Key
- Password

This information is provided by the carrier, and is required to gain access to their system through Web Services.

d. In the panel on the left under **General**, choose **General**. Expand the **Store Information** section, and verify that the following fields are complete:

Store Name	The name of the store or store view.
Store Contact Telephone	The telephone number of the primary contact for the store or store view.
Country	The country where your store is based.
VAT Number	If applicable the Value Added Tax number of your store. (Not required for stores based in the U.S.)
Store Contact Address	The street address of the primary contact for the store or store view.

e. If you have multiple stores, and the contact information differs from the default, set **Store View** for each, and verify that the information is complete. If the information is missing, you'll get an error when you try to print the labels.

Store Information

3. When complete, tap **Save Config**.

Carrier Requirements

CARRIER	REQUIREMENTS
USPS	Requires a USPS account. As of February 23, 2018, USPS requires all shipping labels to include postage.
UPS	Requires a UPS account. Shipping labels are available only for shipments that originate in the U.S. Specific credentials are required for stores outside the US.
FedEx	Requires a FedEx account. For stores outside of the U.S., shipping labels are supported for international shipments only. FedEx does not allow domestic shipments that originate outside of the U.S
DHL	Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.

Creating Shipping Labels

To create shipping labels, you must first set up your shipping carrier account to support labels. Then, follow the prompts to enter a description of the package and its contents.

Process Overview:

Step 1: Contact Your Shipping Carriers

Step 2: Update the Configuration for Each Carrier

Step 3: Create Shipping Labels

Step 4: Print the Labels

Step 1: Contact Your Shipping Carriers

Before you begin, make sure that your shipping accounts are set up to process labels. Some carriers might charge an additional fee to add shipping labels to your account.

1. Contact each carrier that you use to activate shipping labels for your store.
2. Follow the instructions provided by each carrier to add shipping label support to your account.

FedEx	Contact FedEx Web Services regarding their label evaluation process.
USPS	Contact uspstechsupport@esecurecare.net to request that API Signature Confirmation V3 be enabled for your live USPS API Access account.
UPS	Contact UPS to confirm your account type supports shipping labels. To generate shipping labels, you must use the UPS XML option.
DHL	Contact the DHL Resource Center to learn more about their services or send an inquiry through their Contact Center.

Step 2: Update the Configuration for Each Carrier

1. Make sure that your Store Information is complete.
2. Follow the instructions below for each carrier account that has been activated for label printing.

UPS Configuration

United Parcel Service ships both domestically and internationally. However, shipping labels can be generated only for shipments that originate within the United States.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand the **UPS** section. Then, verify that your UPS **Shipper Number** is correct. Your Shipper Number appears only when United Parcel Service XML is enabled.
4. When complete, tap **Save Config**.

USPS Configuration

The United States Postal Service ships both domestically and internationally.

1. Continuing in the **Shipping Methods** configuration, expand the **USPS** section. Then, do the following:
   a. Verify that the **Secure Gateway URL** is entered. The correct URL should be entered automatically.
   b. Enter the **Password** provided to you by USPS.
   c. Set **Size** to “Large.” Then, enter the following dimensions:
      - Length
      - Width
      - Height
      - Girth
2. When complete, tap **Save Config**.

FedEx Configuration

FedEx ships domestically and internationally. Stores located outside the United States can create FedEx labels for international shipments only.

1. Continuing in the **Shipping Methods** configuration, expand the **FedEx** section. Then, make sure that the following FedEx credentials are correct:
   - Meter Number
   - Key
   - Password
2. When complete, tap **Save Config**.

DHL Configuration

DHL provides international shipping services.

1. Continuing in the **Shipping Methods** configuration, expand the **DHL** section. Then, do the following:
   a. Verify that the **Gateway URL** is entered. The correct URL should be entered automatically.
   b. Make sure that the following credentials are complete:
      - Access ID
      - Password
      - Account Number
2. When complete, tap **Save Config**.

Step 3: Create Shipping Labels

Process Overview:

Method 1: Create Label for New Shipment

Method 2: Create Label for Existing Shipment

Method 1: Create Label for New Shipment

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and open the record. The status of the order must be either "Pending" or "Processing."
3. In the upper-right corner, tap **Ship**. Then, confirm the shipping information according to carrier requirements.
4. In the lower-right corner, mark the **Create Shipping Label** checkbox. Then, tap **Submit Shipment**, and do the following:
   a. To add products from the order to the package, tap **Add Products**. The Quantity column shows the maximum number of products that are available for the package.
   b. Mark the checkbox of each product to be added to the package, and enter the **Quantity** of each. Then, tap **Add Selected Product(s) to Package**.
   - To add a new package, tap **Add Package**.
   - To delete a package, tap **Delete Package**.

   If you use a package type other than the default, or require a signature, the cost of shipping might differ from what you have charged the customer. Any difference in the cost of shipping is not reflected in your store.

5. When complete, tap **OK**.

If you need to cancel an order, tap **Cancel**. A shipping label will not be created, and the Create Shipping Label checkbox is cleared.

Magento connects to the shipping carrier system, submits the order, and receives a shipping label and tracking number for each package.

- If the label is successfully created, the shipment is submitted, the tracking number appears in the form, and the label is ready to print.
- If the carrier cannot create the label due to the problems with connection, or for any other reason, the shipment is not processed.

Method 2: Create Label for Existing Shipment

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and open the Shipping form. Then, do the following:
   a. In the Shipping and Tracking Information section, tap **Create Shipping Label**.
   b. Distribute the ordered product(s) to the appropriate package(s), and tap **OK**.
   c. To review the package information, tap **Show Packages**.

Magento connects to the shipping carrier system, submits an order, and receives a shipping label and a tracking number.

If a shipping label for this shipment already exists in the system, it is replaced with a new one. However, existing tracking numbers are not replaced. Any new tracking number is added to the existing one.

Step 4: Print the Labels

Shipping labels are generated in PDF format, and can be printed from the Admin. Each label includes the order number and package number.

> Because an individual shipment order for each package is created, multiple shipping labels might be received for a single shipment.

Process Overview:

Method 1: Print Label from Shipment Form

Method 2: Print Labels for Multiple Orders

Method 1: Print Label from Shipment Form

1. On the Admin sidebar, tap Sales. Then, do one of the following:
   - Choose **Orders**. Find the order in the grid, and open the record. In the panel on the left, choose **Shipments**. Then, open the shipment record.
   - Choose **Shipments**. Find the order in the grid, and open the record.
2. To download the PDF file, go to the Shipping and Tracking section of the form, and tap **Print Shipping Label**. Depending on your browser settings, the shipping labels can be viewed and printed directly from the PDF file.

The Print Shipping Label button appears only after the carrier generates labels for the shipment. If the button is missing, click **Create Shipping Label**. The button appears after Magento receives the label from the carrier.

Method 2: Print Labels for Multiple Orders

1. On the Admin sidebar, tap **Sales**. Then, choose one of the following:
   - Orders
   - Shipments
2. In the grid, mark the checkbox of each order with shipping labels to be printed.
3. Set the **Actions** control to "Print Shipping Labels."
4. Tap **Submit**.

A complete set of shipping labels is printed for each shipment that is related to the selected orders.

Required Carrier Configuration Settings

SETTING	DESCRIPTION
Type	Package types differ by carrier and method. The default package type for each carrier is initially selected. USPS does not require the package type for domestic shipments.
Customs Value	(International shipments only) The declared value or sales price of the contents of an international shipment.
Total Weight	The total weight of all products added to the package is calculated automatically. The value can also be changed manually, and entered as pounds or kilograms.
Length, Width, Height	(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.

Required Carrier Configuration Settings (cont.)

SETTING	DESCRIPTION	
	Not Required	No confirmation of delivery is sent to the store by the shipping carrier.
	No Signature	A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.
	Signature Required	The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.
	Direct	(FedEx Only) FedEx obtains a signature from someone at the delivery address. If no one is available to sign for the package, the carrier tries to deliver the package at another time.
	Indirect	(FedEx Residential Deliveries Only) FedEx obtains the signature of someone, possibly a neighbor or building manager, at the delivery address. The recipient can leave a signed FedEx door tag to authorize the package to be left without anyone present to sign for it.
	Contents	(USPS Only) Select one of the following descriptions of the package: Gift Documents Commercial Sample Returned Goods Merchandise Other
	Explanation	(USPS Only) A detailed description of the package contents.
	Adult Required	The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.

Label Packages

The Create Packages window appears when you choose to create a shipping label. You can start configuring the first package immediately.

To configure a package:

1. Complete the fields as described below.

> If you select the non-default value in the Type field or choose to require a signature confirmation, the price of a shipment may differ from the one you charged to the customer.

2. To view a list of shipped products and add them to the package, tap **Add Products**.

   The Qty column shows the maximum quantity that is available to add. For the first package, the number is the total quantity of the product to be shipped.

3. Specify the products and quantities. To add the products to the package, tap **Add Selected Product(s) to Package**.

   - To add a new package, tap **Add Package**. You can add several packages, and edit them at the same time.
   - To delete a package, tap **Delete Package**.

After products are added to the package, the quantity cannot be edited directly.

To increase the quantity:

1. Tap **Add Selection** .
2. Enter the additional quantity.

The number is added to the previous quantity of the product in the package.

To decrease the quantity:

1. Delete the product from the package.
2. Tap **Add Selection**.
3. Enter the new, smaller value.

After you distribute all products, the total number of the packages you are going to use equals the number of the last package in the list. The OK button is disabled until all shipped items are distributed to packages, and all necessary information is complete.

4. When complete, tap **OK** to generate the labels.

If you need to stop the process, tap **Cancel**. The packages are not saved, and the shipping label process is canceled.

Field Descriptions

FIELD	DESCRIPTION
Type	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: **Not Required** – No delivery confirmation letter is sent to you. **No Signature** – A delivery confirmation letter without a recipient's signature is sent to you. **Signature Required** – The shipping carrier obtains the recipient's signature and provides you with its printed copy. **Adult Required** – The shipping carrier obtains the adult recipient's signature and provides you with its printed copy. **Direct (FedEx only)** – FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package. **Indirect (FedEx only)** – 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: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS shipments only) Detailed description of the package content.

REPORTS

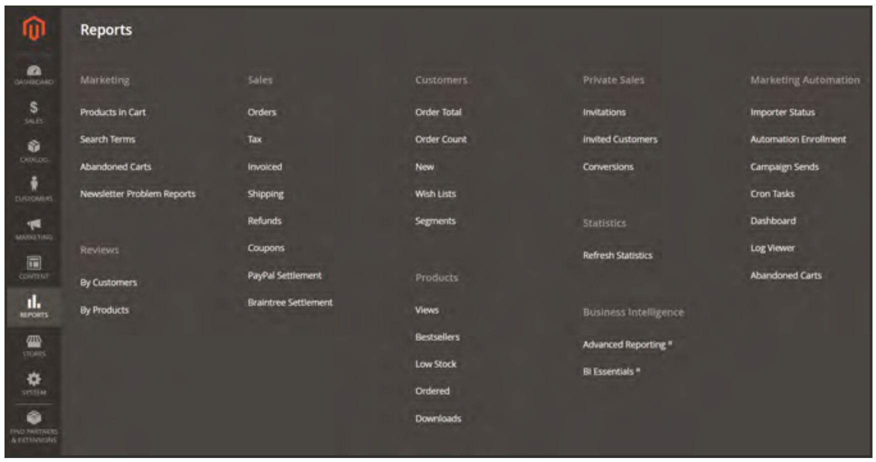
Contents

In this section of the guide, you will learn how to filter data and online generate reports. The report data can be opened in a spreadsheet or imported into other applications.

CHAPTER 80:

Reports Menu

Magento Commerce provides a wide selection of reports to keep you informed on your marketing efforts, sales products, and customer activity. The Reports menu provides easy access to current information about your sales, products, customers, and promotions.



Reports Menu

To display the Reports menu:

On the Admin sidebar, tap **Reports**.

Menu Options

Marketing

A selection of marketing reports, including Products in Cart, Search Terms, Abandoned Carts, and Newsletter Problem Reports.

Reviews

The selection of product review reports includes By Customer and By Product.

Sales

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and settlement reports for PayPal and Braintree.

Customers

The selection of customer reports includes Order Total, Order Account, New, Wish Lists, and Segments.

Products

The selection of product reports includes Views, Bestsellers, Low Stock, Ordered, and Downloads.

Private Sales

The selection of reports for private sales and events includes Invitation, Invited Customers, and Conversions.

Statistics

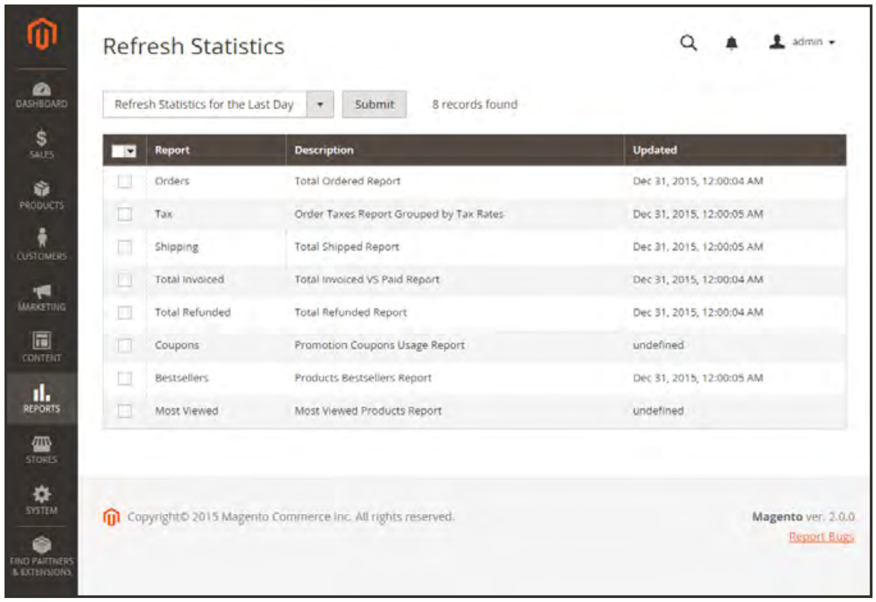
Statistics is a tool that reduces the performance impact of generating reports by calculating and storing statistical data. Rather than recalculate the statistics every time a report is generated, the stored statistics are used until you refresh the statistics.

Business Intelligence

The Advanced Reporting dashboard gives you valuable insight with a dynamic set of product, order, and customer reports, powered by Magento Business Intelligence. for more sophisticated reporting and analysis, sign up for a free trial of BI-Essentials.

Refresh Statistics

To reduce the performance impact of generating sales reports, Magento calculates and stores the required statistics for each report. Rather than recalculate the statistics every time a report is generated, the stored statistics are used, unless you refresh the statistics. To include the most recent data, the report statistics must be refreshed before a sales report is generated.



Refresh Statistics

To refresh report statistics:

1. On the Admin sidebar, tap **Reports**. Then under Statistics, choose **Refresh Statistics.**
2. In the list, mark the checkbox of each report to be refreshed.
3. Set the **Actions** control to one of the following:
   - Refresh Lifetime Statistics
   - Refresh Statistics for the Last Day
4. When complete, tap **Submit**.

CHAPTER 81:

Marketing Reports

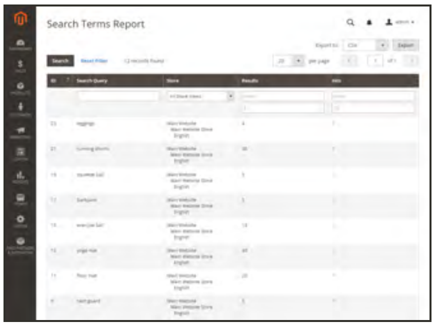
Marketing reports provide information about the status of shopping carts, the use of search terms, and newsletter transmissions.

Products in Cart Report

Reports

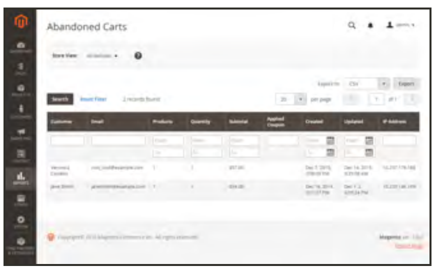
Products in Cart

The Products in Cart Report lists all products currently in shopping carts, and includes the name and price of each item, the number of carts with the item, and the number of times each item has been ordered.



Search Terms

The Search Terms Report shows what your customers are looking for in each store view. The report includes the number of matching items found in the catalog, and how many times the search term has been used.



Abandoned Carts

The Abandoned Carts Report lists all registered customers who have abandoned carts that have not yet expired. The report includes the customer name and email address, the number of products in the cart and subtotal, the date created, and date last updated.

Newsletter Problems

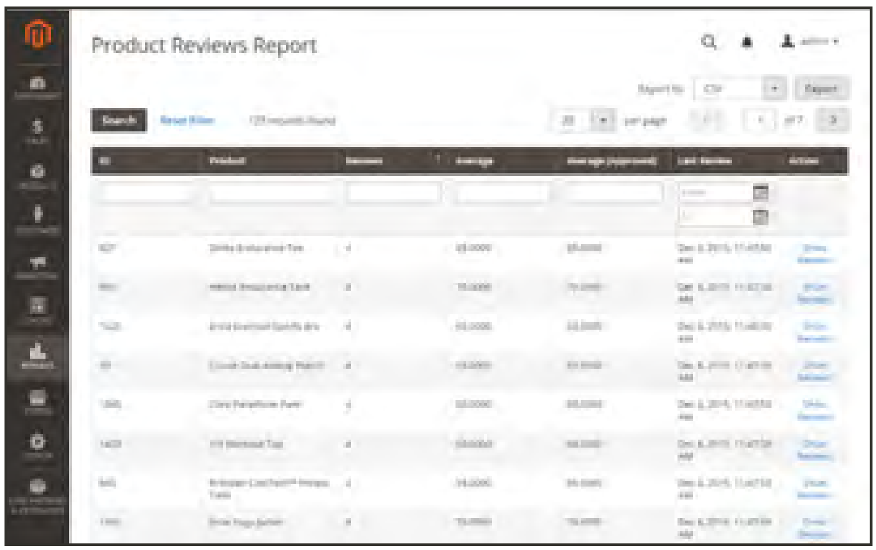
The Newsletter Problems Report includes information about any newsletter queue that failed to transmit successfully. The report includes the name of each subscriber, and queue date and subject, the information about the error.

CHAPTER 82:

Review Reports

The Review Reports provide information about product reviews by customer and by product.

- By Customers
- By Products

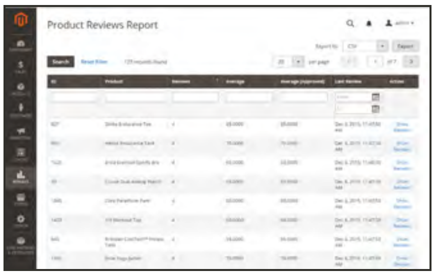


Review Report by Product

Reports

By Customers

The Customer Reviews Report lists all customer who have submitted product reviews. The report includes the number of reviews submitted by each customer, and a link to the list of reviews.



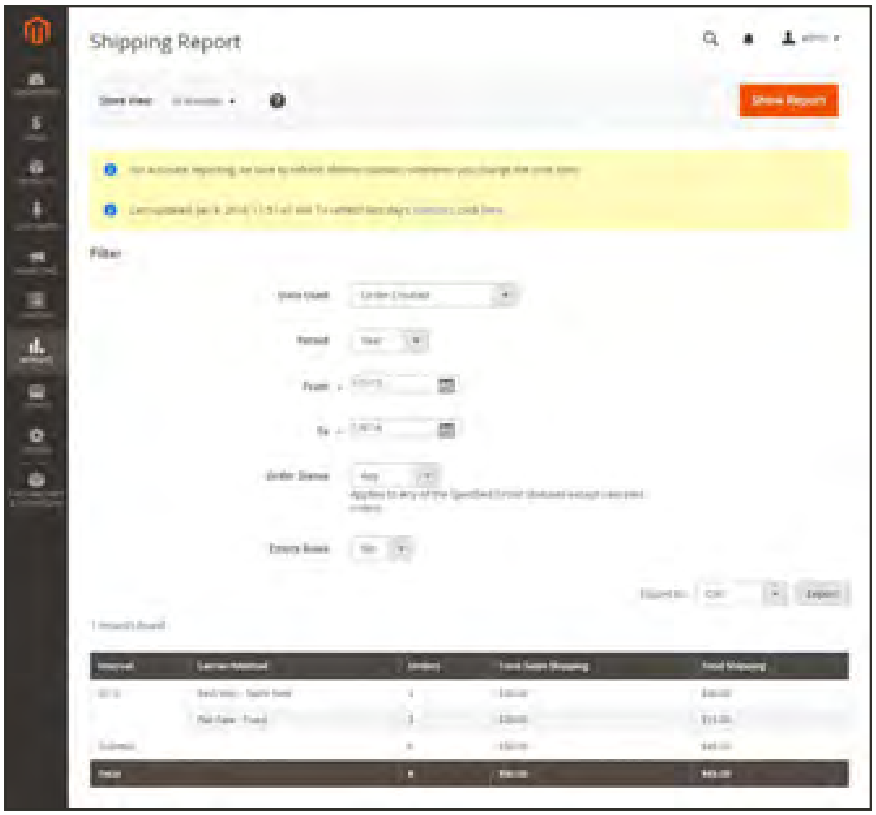
By Products

The Product Reviews Report lists all products that have been reviewed by customers. The report includes the number of reviews and average rating, the product was last reviewed, and a link to the list of reviews for each product.

CHAPTER 83:

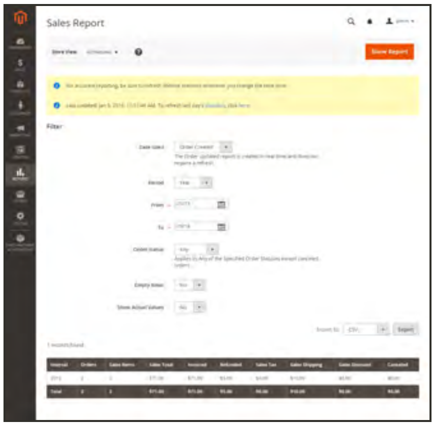
Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.



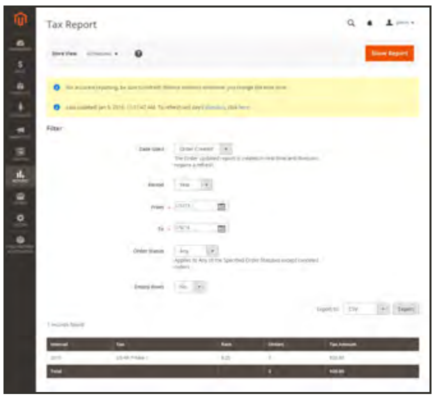
Shipping Report

Reports



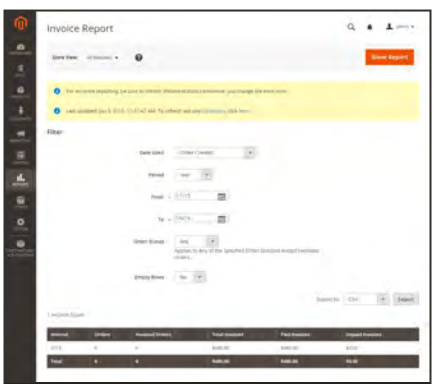
Orders

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.



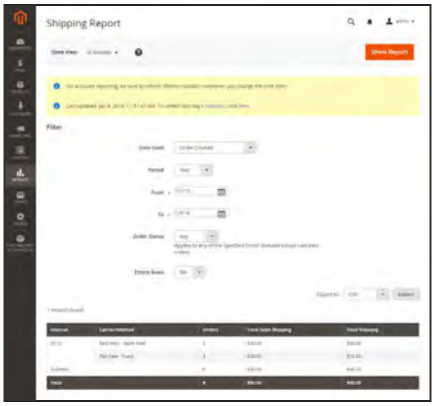
Tax

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.

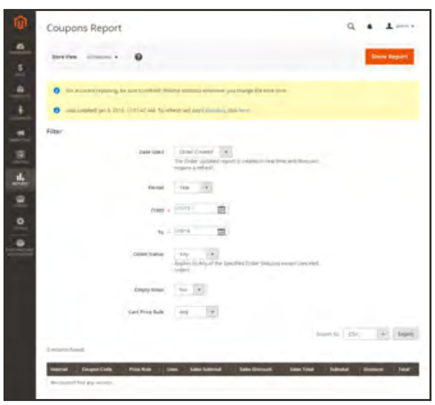


Shipping

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.

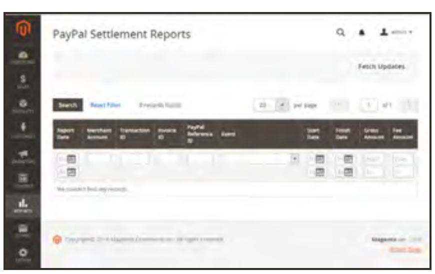
Refunds

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.



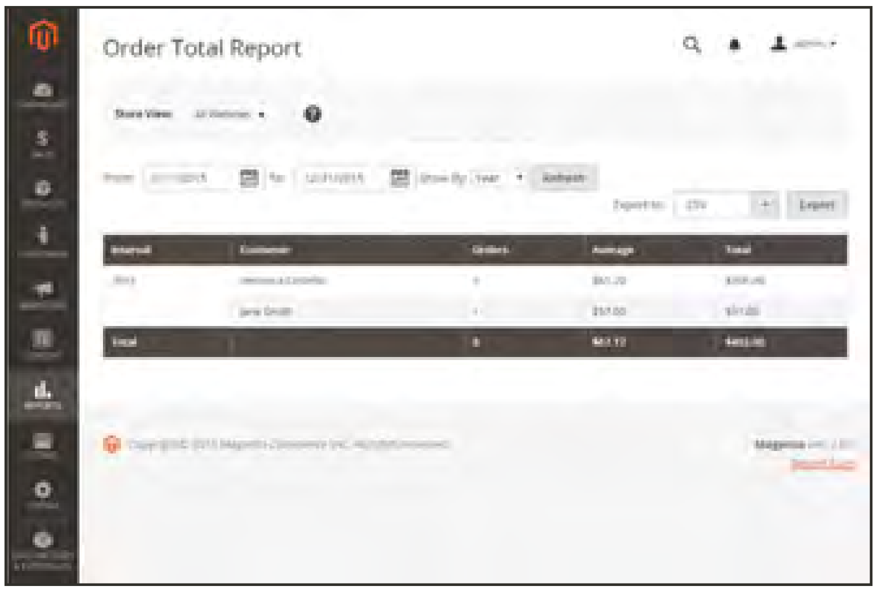
PayPal Settlement

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.

CHAPTER 84:

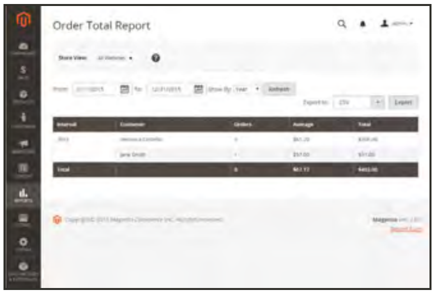
Customer Reports

Customer reports provide insight into customer activity during a specified period of time or date range.



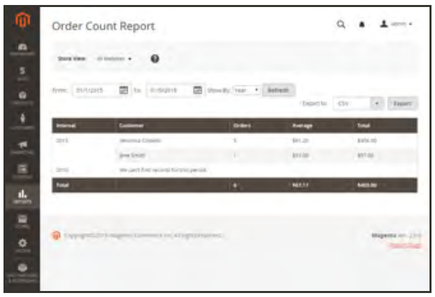
Order Total Report

Reports



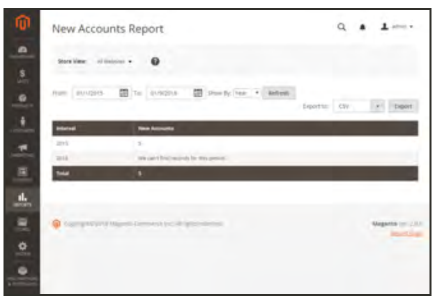
Order Total

The Order Total Report shows customer orders for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.



Order Count

The Order Count Report shows the number of orders per customer for a specified time interval or date range. The report includes the number of orders per customer, average order amount, and total amount.



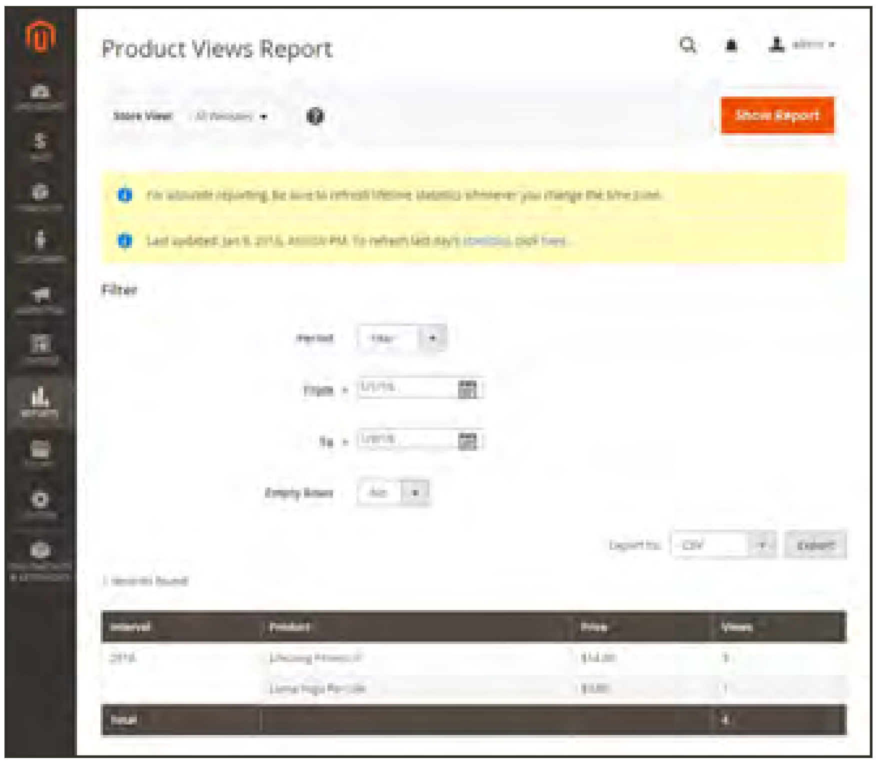
New Accounts

The New Accounts Report shows the number of new customer accounts opened during a specified time interval or date range.

CHAPTER 85:

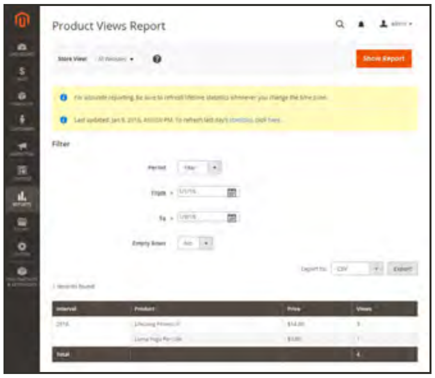
Product Reports

The product reports give you insight regarding products viewed and ordered, bestsellers, stock levels, and downloads.



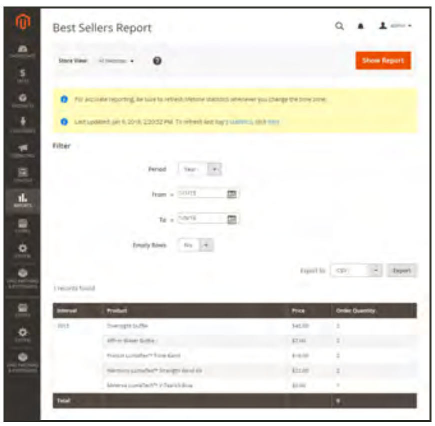
Product Views Report

Reports



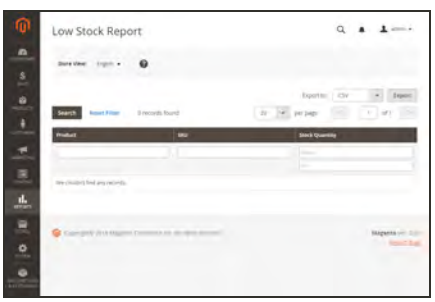
Product Views

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.



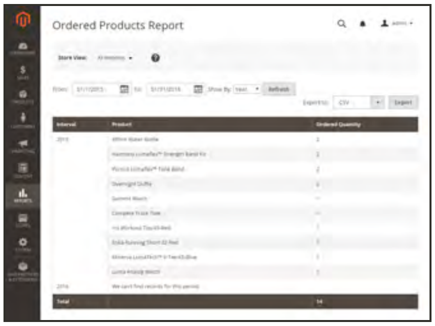
Bestsellers

The Bestsellers Report shows the five top-selling five during an interval of time or date range. The report includes the product name, price, and quantity ordered.



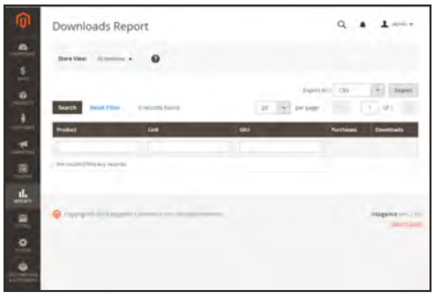
Low Stock

The Low Stock Report lists all products with stock levels within a specified range.



Ordered Products

The Ordered Products Report lists all products ordered for a specified time interval or date range. The report includes the product name and quantity ordered.



Downloads

The Downloads Report lists all downloads during the specified time interval or date range. The report includes the product name, download link, and SKU, with the number of purchases and downloads.

CHAPTER 86:

Private Sales Reports

The Private Sales Reports provide information about events and private sales.

Invitations Report

Reports

Invitations

The Invitations Report shows the number of invitations sent during the specified time period, and the number accepted, and discarded.

Invited Customers

The Invited Customers Report shows all customers who have been sent invitations to a private sale or event, and includes the name and email address, customer group, and the number of invitations sent and the number accepted.

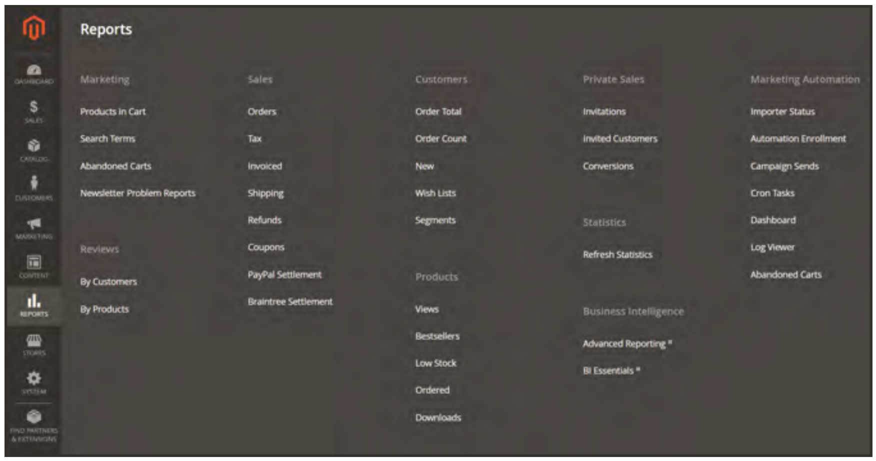
Conversions

The Conversions Report shows the number of invitations sent and accepted, the number of invitations that led to a purchase, and the conversion rate as a percentage.

CHAPTER 87:

Marketing Automation

The Marketing Automation section of the Reports menu includes a wide selection of reports to help you track campaign activity and performance.



Marketing Automation Reports

To access Marketing Automation reports:

1. On the Admin sidebar, choose **Reports**.
2. In the menu under **Marketing Automation**, choose one of the following reports:
   - Importer Status
   - Automation Enrollment
   - Campaign Sends
   - Cron Tasks
   - Dashboard
   - Log Viewer
   - Abandoned Carts

Business Intelligence

Contents

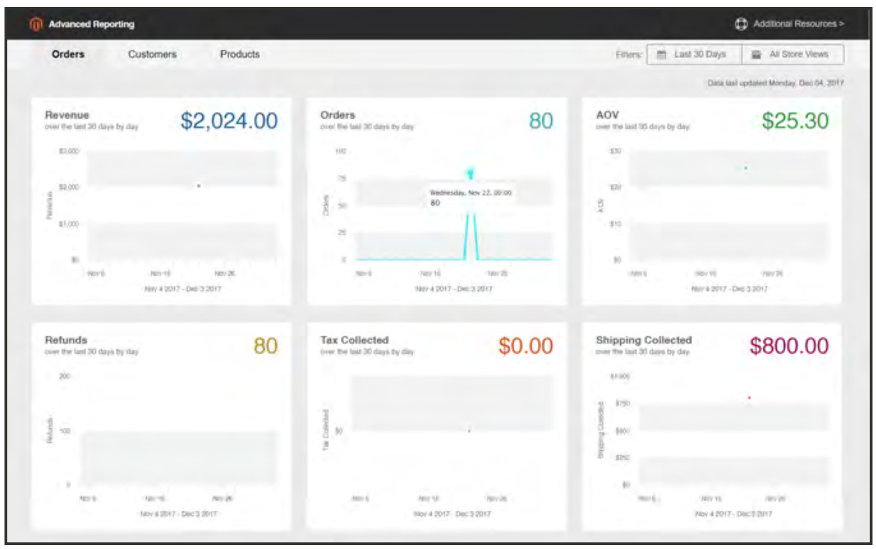
Magento advanced reporting and business intelligence tools give you the insight you need to make sound business decisions. Analyze your top-performing customers, products, and promotions to find new opportunities for growth. Then, share the insights across your organization with just a few clicks.

CHAPTER 88:

Advanced Reporting

Advanced Reporting gives you access to a suite of dynamic reports that are based on your product, order, and customer data, with a personalized dashboard that is tailored to your business needs. Advanced Reporting is a free, cloud-based service that is powered by Magento Business Intelligence.

For technical information, see Advanced Reporting in our developer documentation.



Advanced Reporting Dashboard

Requirements

- The website must run on a public web server.
- The domain must have a valid security (SSL) certificate.
- Magento must have been installed or upgraded successfully without error.
- In the Magento configuration, the Base URL (Secure) setting for the store view must point to the secure URL. For example https://yourdomain.com

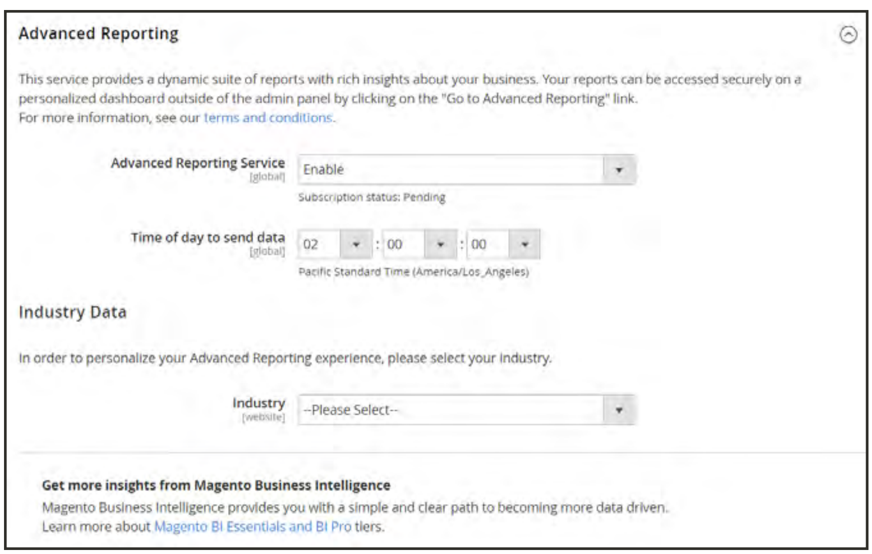
- In the Magento configuration, Use Secure URLs on Storefront, and Use Secure URLs in Admin must be set to “Yes.”
- Make sure that Magento crontab is created and cron jobs are running on the installed server.

> The initial release of Advanced Reporting supports only one base currency.

Step 1: Enable Advanced Reporting

In the Magento configuration, Advanced Reporting is enabled by default, and starts automatically if cron is configured and running. An attempt to establish the subscription is initiated at the beginning of each hour over the next 24-hours until successful. The subscription status is “pending” until the subscription is successfully established.

1. On the Admin sidebar, choose **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, choose **General**. Then under **Advanced Reporting**, do the following:
   a. Verify that **Advanced Reporting Service** is set to “Enable.” (This is the default setting.)
   b. Set the **Time of day to send data** to the hour, minute, and second, according to a 24-hour clock, that you want the service to receive updated data from your store. By default, data is sent at 2:00 AM.
   c. Under **Industry Data**, choose the **Industry** that best describes your business.



Advanced Reporting

3. When complete, tap **Save Config**.
4. When prompted, click the Cache Management in the message at the top of the page. Then, refresh any invalid caches.

5. Wait overnight, or until after the time of your next scheduled update. Then, check the status of your subscription. If the status is still “pending,” make sure that your installation meets all of the requirements.

Step 2: Access Advanced Reporting

1. Do one of the following:
   - In the Admin sidebar, choose **Dashboard**. Then, tap **Advanced Reporting**.
   - On the Admin sidebar, choose **Reports**. Then under **Business Intelligence**, choose **Advanced Reporting**.

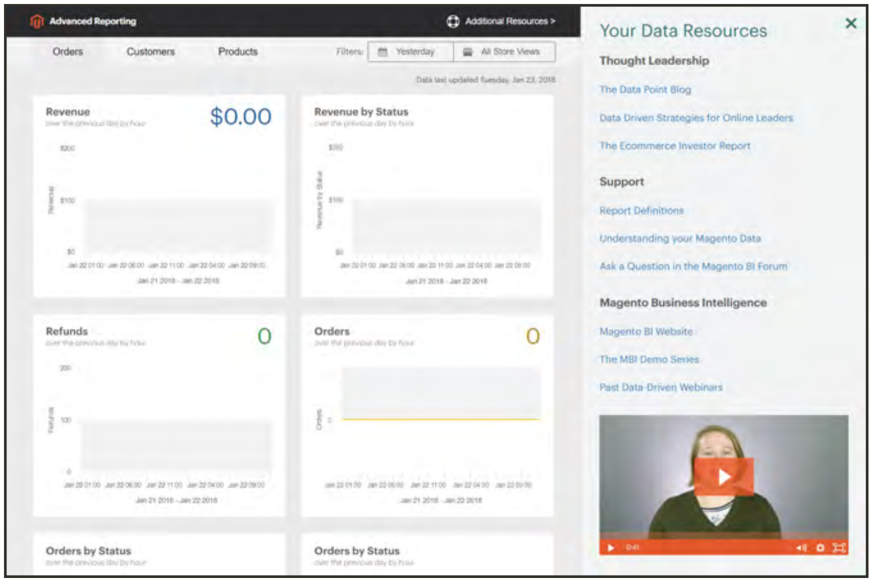
   The Advanced Reporting dashboard provides a quick summary of your orders, customers, and products. Make sure to scroll down to see the full dashboard.

2. To get a better view of the data, set the **Filters** in the upper-right corner to the time period and store view that you want to include in the report. Then, do the following:
   - Hover over any data point for more information.
   - Click each tab to see all dashboard reports.

Data Point

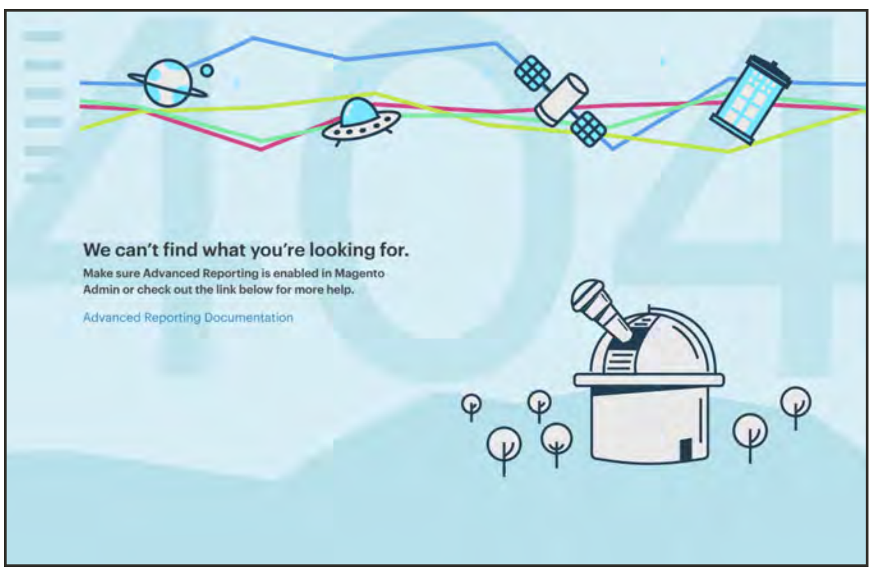
To access your data resources:

1. In the upper-right corner of the Advanced Reporting dashboard, click **Additional Resources**.



Troubleshooting

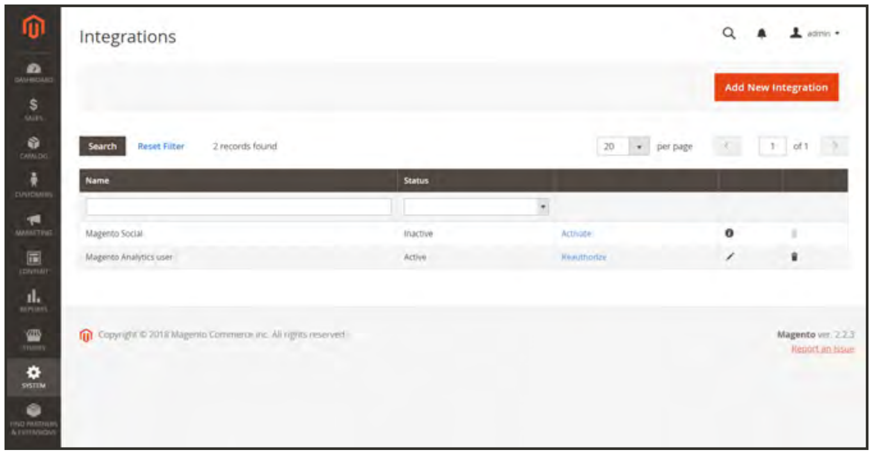
If you get a 404 "Page Not Found" message, verify that your store meets the requirements for Advanced Reporting. Then, follow the instructions to verify that the integration is installed.



Advanced Reporting Not Available

Verify that the Integration is Active

1. On the Admin menu, choose **System**. Then under **Extensions**, choose **Integration**.
2. Verify that the **Magento Analytics user** integration appears in the list, and that the **Status** is "Active."
3. To reestablish the user, click **Reauthorize**. Then, do the following:

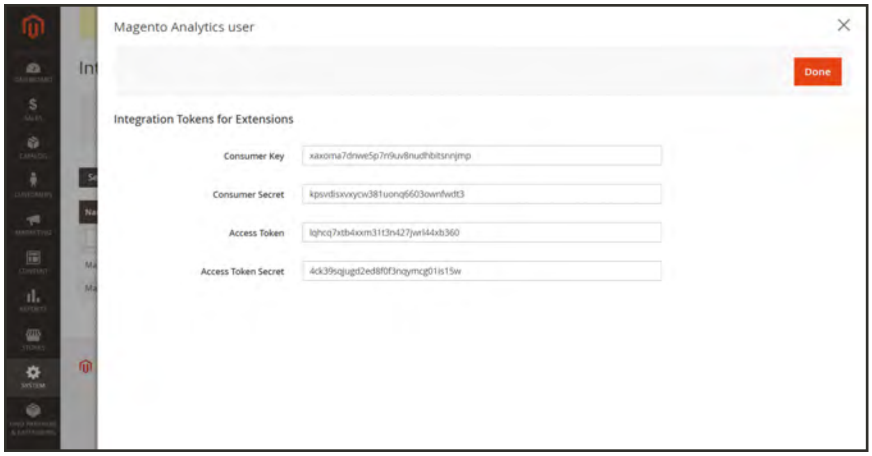


Reauthorize

   a. When prompted, tap **Reauthorize** to approve access to the API resources.

Reauthorize Access to API Resources

   b. Verify that the list of Integration Tokens for Extensions is complete. Then, tap **Done**.



Integration Tokens

4. Look for the message that indicates the integration “Magento Analytics user” has been reauthorized.

5. Wait overnight, or until after the time of your next scheduled update.

Dashboard Reports

FIELD	DESCRIPTION
ORDERS	
Revenue	Shows all revenue received by the store view during the defined time period.
Orders	Shows all orders placed through the store view during the defined time period.
AOV	Shows the average order value placed through the store view during the defined time period.
Refunds	Shows all refunds processed through the store view during the defined time period.
Tax Collected	Shows all tax collected through the store view during the defined time period.
Shipping Collected	Shows all shipping fees collected through the store view during the defined time period.
Orders by Status	Shows the number of orders by status, for the store view during the defined time period.
Orders by Status	Lists a summary of the number of orders by status.

Dashboard Reports (cont.)

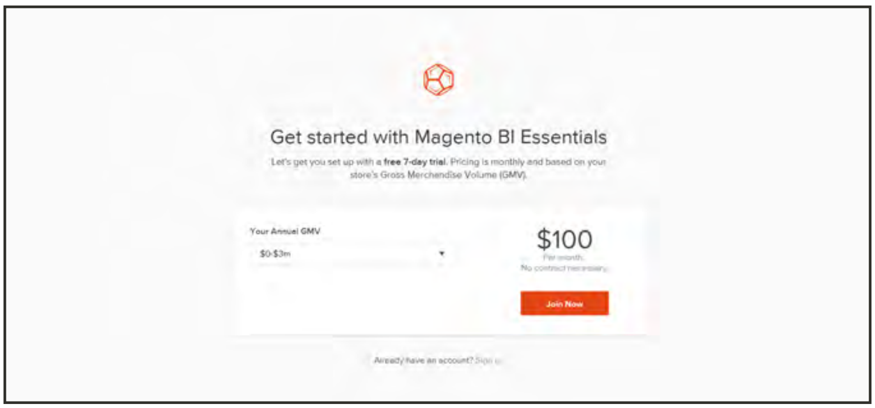
FIELD	DESCRIPTION
Coupon Usage	Lists all coupon codes and the number of users for each, redeemed through the store view during the defined time period.
Orders and Revenue by Billing Region	Lists the number of orders and revenue by region for the store view during the defined time period.
Tax Collected by Billing Region	Lists the amount of tax collected by region for the store view during the defined time period.
Shipping Fees Collected by Shipping Region	Lists the shipping fees collected by region for the store view during the defined time period.
CUSTOMERS	
Unique Customers	Shows the number of unique customer accounts associated with the store view during the defined time period.
New Registered Accounts	Shows the number of new customer accounts registered with the store view during the defined time period.
Top Coupon Users	Lists the top coupon users by Customer ID, and the number of orders placed with coupons for the store view during the defined time period.
Customer KPI Table	Lists the number of orders, revenue, and average order value by Customer ID for the store view during the defined time period.
PRODUCTS	
Quantity of Products Sold	Shows the number of products sold through the store view during the defined time period.
Products Added to Wishlists	Lists all products added to wishlists through the store view during the defined time period.
Best Selling Products by Quantity	Lists the best-selling products and quantity sold through the store view during the defined time period.
Best Selling Products by Revenue	Lists the best-selling products and revenue generated by the sale of the product through the store view during the defined time period.

CHAPTER 89:

BI Essentials

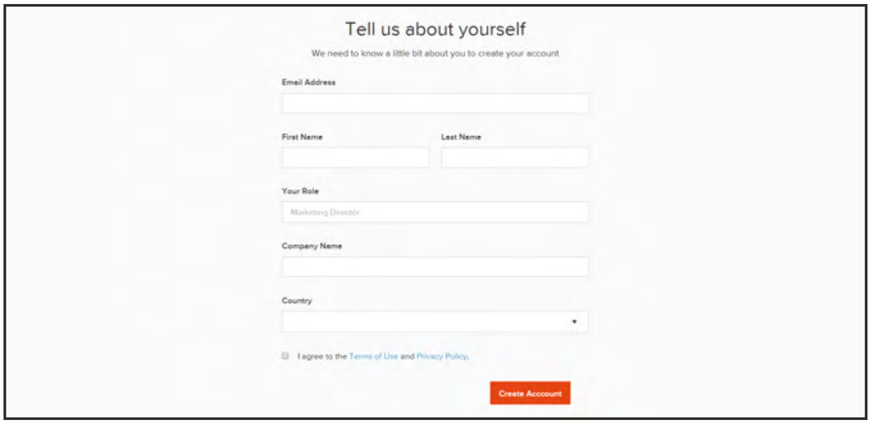
Magento Business Intelligence is a cloud-based subscription service that gives you access to sophisticated dynamic reports. You can sign up for a seven-day free trial from the Reports section of the Admin. The price for continued access is based on your monthly gross merchandise (GMV) volume, and starts at $100 per month.

The instructions in this section walk you through the setup, and introduce some basic features of Magento BI Essentials. For more detailed information, see the Magento BI Help Center.



To sign up for Magento BI Essentials:

1. On the Admin sidebar, choose **Reports**. Then under **Business Intelligence**, choose **BI Essentials**.
2. Choose the range of **Your Annual GMV**. Then, tap **Join Now**.
3. Complete the sign-up form. Then, tap **Create Account**.



Create Account

4. When prompted, enter a **password** for your account.

   Your password must be eight characters long, and include at least one special character.

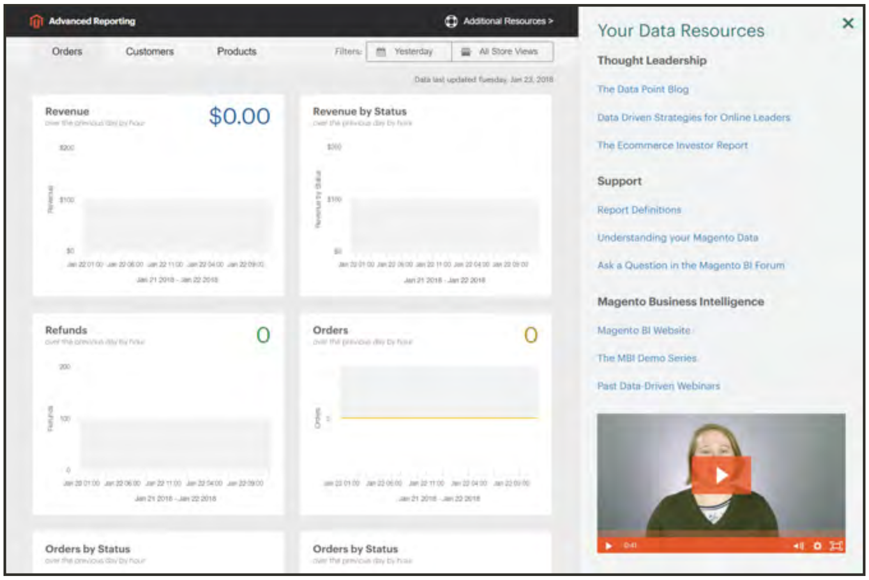
Enter Your Password

5. Check your email for a Welcome message from the Magento BI Team, with your login credentials. To learn more, see the Essentials Quick Start Video Series.

To access Magento BI Essentials:

Method 1: From the Admin

1. From the Dashboard of your store, tap **Go to Advanced Reporting**.
2. In the upper-right corner, click **Additional Resources**. Then under **Magento Business Intelligence**, choose **Magento BI Website**.



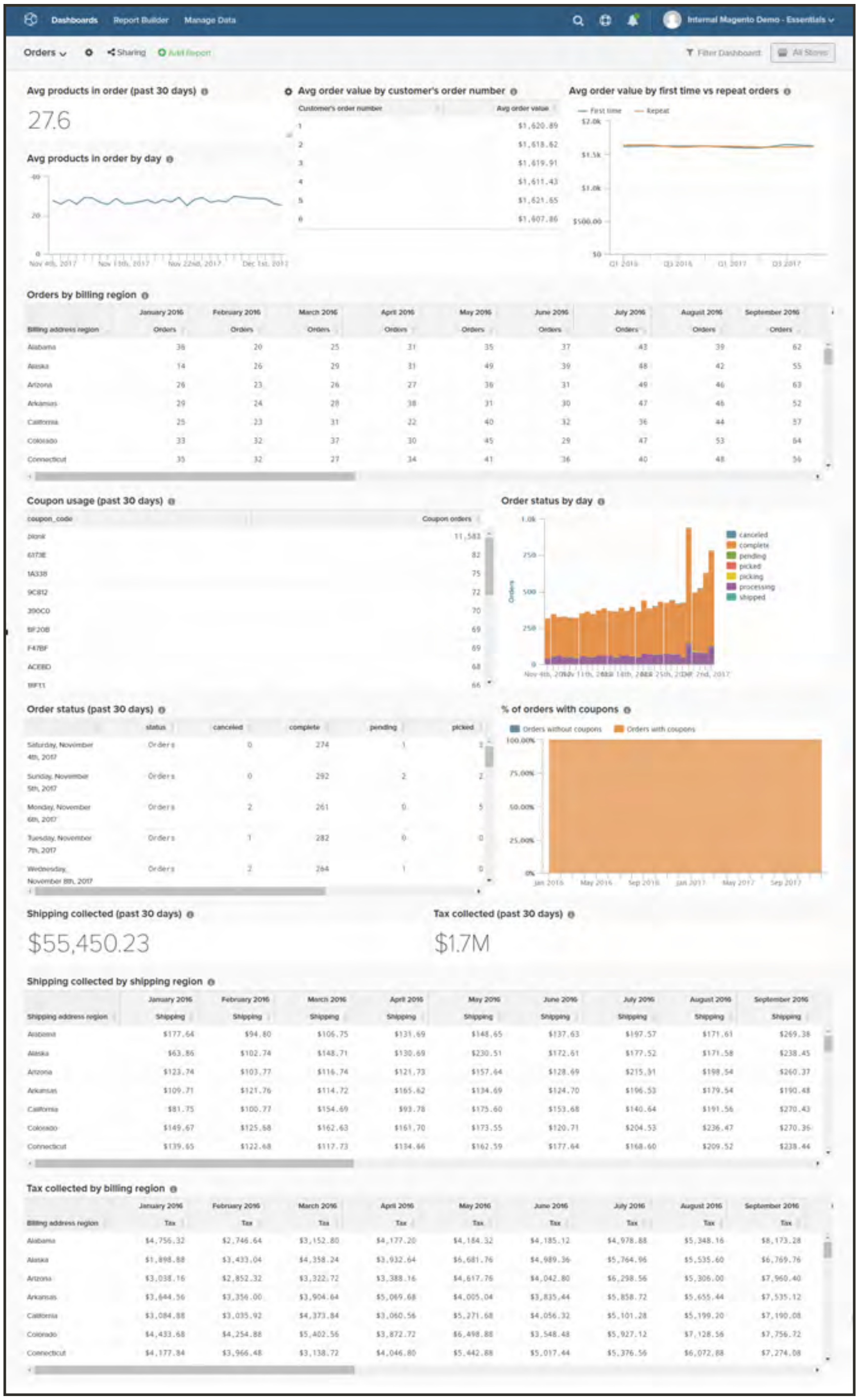
Your Data Resources

Method 2: From your browser

1. Go to the Magento BI website.
2. Enter your **Email Address** and **Password**. Then, tap **Sign In**.

Sign In to Magento BI

3. Your Magento BI dashboard appears.

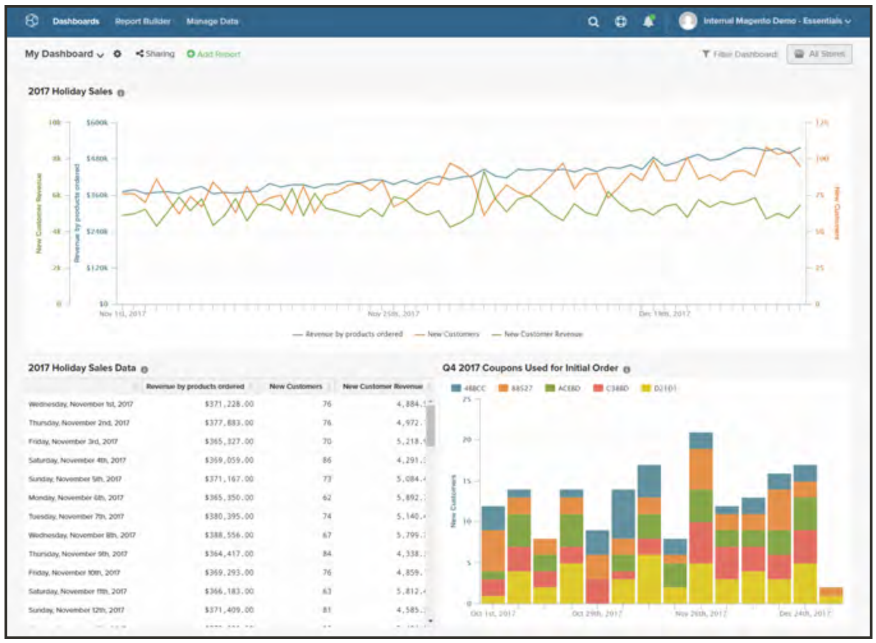


Magento BI Essentials Dashboard

Dashboards

BI Dashboards give you a quick view of your store's performance and sales activity at a glance. Individual dashboards can be shared with other users, and organized into logical groups. You can also set different levels of permission to others users.

It's easy to create a new report, add it to a dashboard, and export the data to Excel. Charts and reports can be resized and dragged into position on the dashboard.



Dashboard

To create a new dashboard:

1. On the menu, choose **Dashboards**.

2. The name of the default dashboard appears in the upper-left corner of the dashboard header. Click the down arrow (⌄) to show the available options.

Create Dashboard

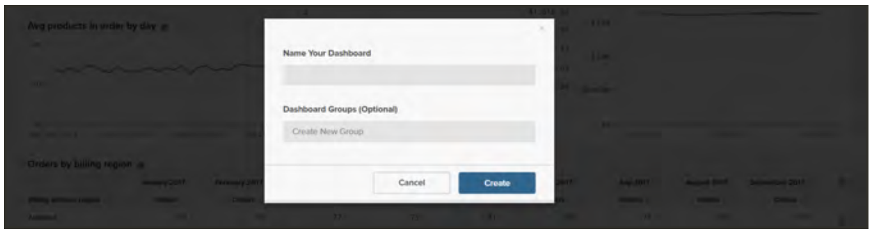
3. Tap **Create Dashboard**. Then, do the following:

   a. Enter a **Name** for your dashboard.

   b. To create a new **Group** for the dashboard, enter the name of the group.

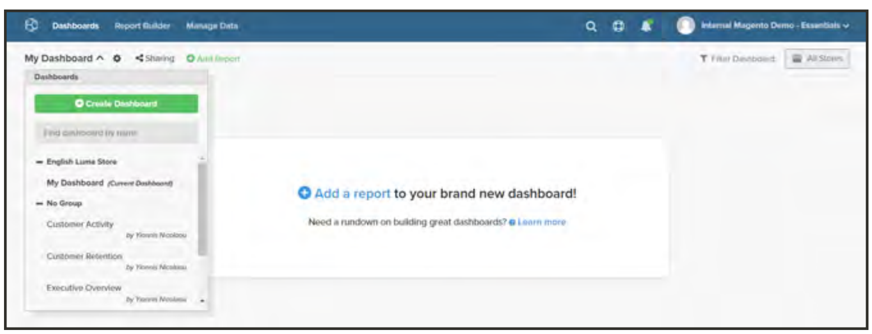
   For example, if your Magento installation has multiple store views, you might create a Group for each store view.

   c. Tap **Create**.



Dashboard Name

   d. The name of your new dashboard appears in the upper-left corner. Click the down arrow to show the options. If you created a group, the new dashboard appears below the group in the list.

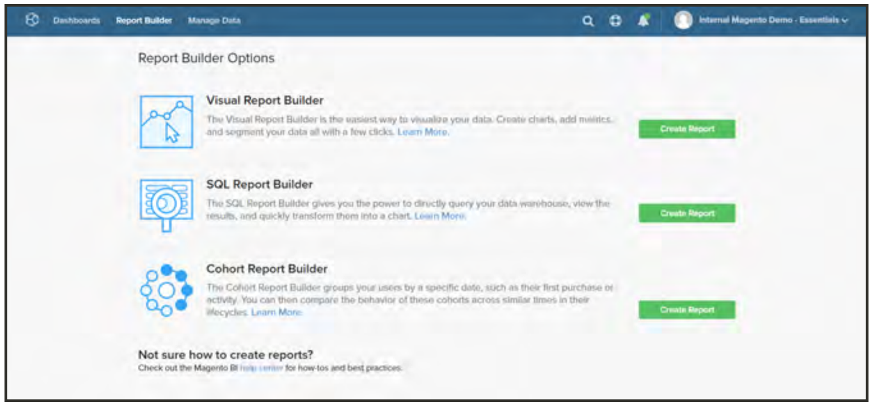


Add Report

4. To add a report, do one of the following:

   - Click the **Add a report** prompt on the page.
   - In the dashboard header, click **Add Report**.

5. Click **Create Report**. to show the Report Builder Options.



Report Builder Options

To arrange items on a dashboard:

- To resize a chart or report, drag the lower-right corner to the new size.
- To move a chart or report, hover over the title or header until the cursor changes to a cross. Then, drag it into position.

To manage dashboard settings:

1. On the menu, choose **Manage Data**. Then in the sidebar, choose **Dashboards**.
2. If applicable, enter a new **Dashboard Name**.
3. To assign the dashboard to a specific **Dashboard Group**, choose from the list of groups.

Permissions

To give all users the same level of access to the dashboard, do the following:

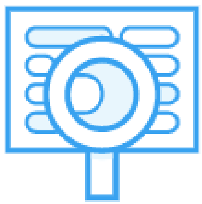
1. Under **Shared with**, choose one of the following options:
   - View
   - Edit
   - None
2. When prompted for confirm, tap **OK** to update the permissions level for each user.
3. To change the permission level of an individual, find the user in the list change the permission level. The change is automatically saved.

4. To make this dashboard the default for your BI Essentials account, tap **Make Default**.
5. To remove the dashboard, tap **Delete Dashboard**.

Report Builder

Visual Report Builder

The Visual Report Builder is the easiest way to visualize your data. Create charts, add metrics, and segment your data all with a few clicks.



SQL Report Builder

The SQL Report Builder gives you the power to directly query your data warehouse, view the results, and quickly transform them into a chart.

Visual Report Builder

Visual Report Builder makes it easy to create quick reports based on predefined metrics. Each metric includes a query that defines the set of data for the report.

The following example shows how to create a simple report, group the data by an additional dimension, set the date and time interval, change the chart type, and save the report to a dashboard.

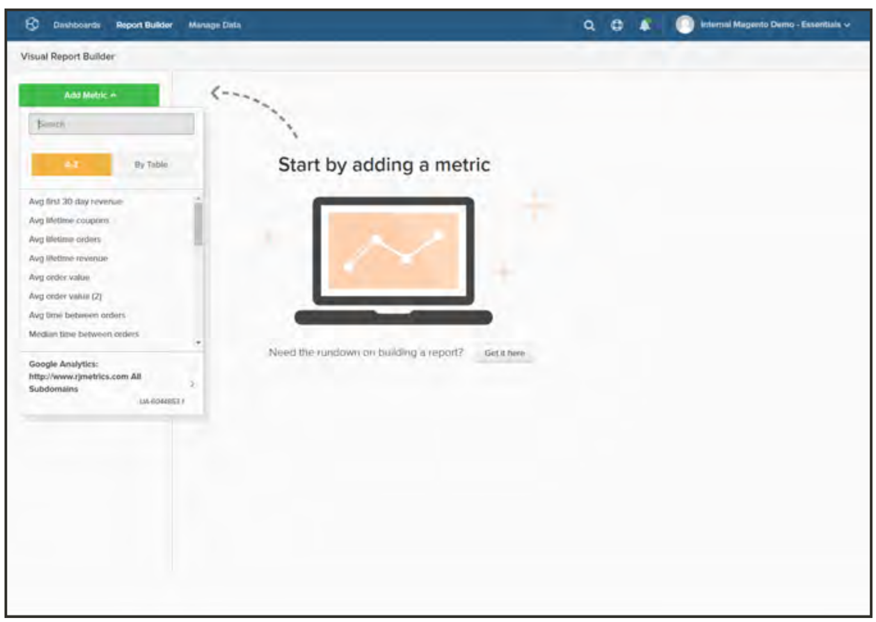
To create a simple report:

1. In the BI Essentials menu, choose **Report Builder**.

2. Under **Visual Report Builder**, tap **Create Report**. Then, do the following:

   a. Tap **Add Metric**.

   The available metrics can be listed alphabetically or by table.

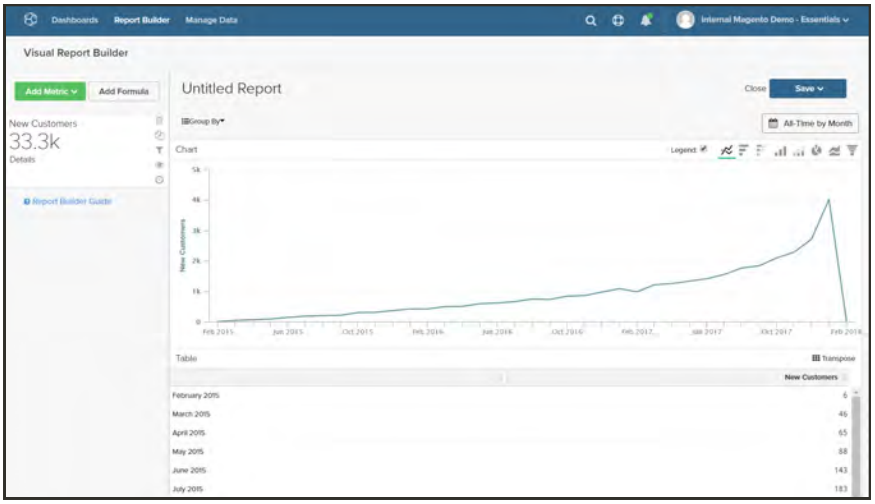


Visual Report Builder

   b. Choose the metric that describes the set of data that you want to use for the report.

   The New Customers metric used in this example counts all customers, and sorts the list by the date the customer signed up for an account. The initial report includes a simple line graph, followed by the table of data.

   The summary on the left shows the name of the current metric, followed by the result of any calculations on column data that are specified in the metric. In this example, the summary displays the total customer count.



Visual Report Builder

3. In the chart, hover over each data point on the line. Each data point shows the total number of new customers who signed up during that month.

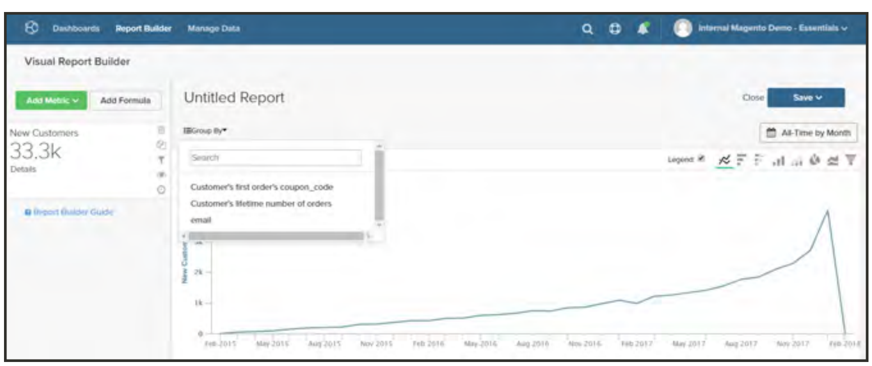
4. Follow these instructions to group the data, change the date range, and chart type.

Group By

The Group By control gives you the ability to add multiple dimensions by group or segment. Dimensions are columns in the table that can be used to group the data.

1. Choose one of the available dimensions from the list of **Group By** options.

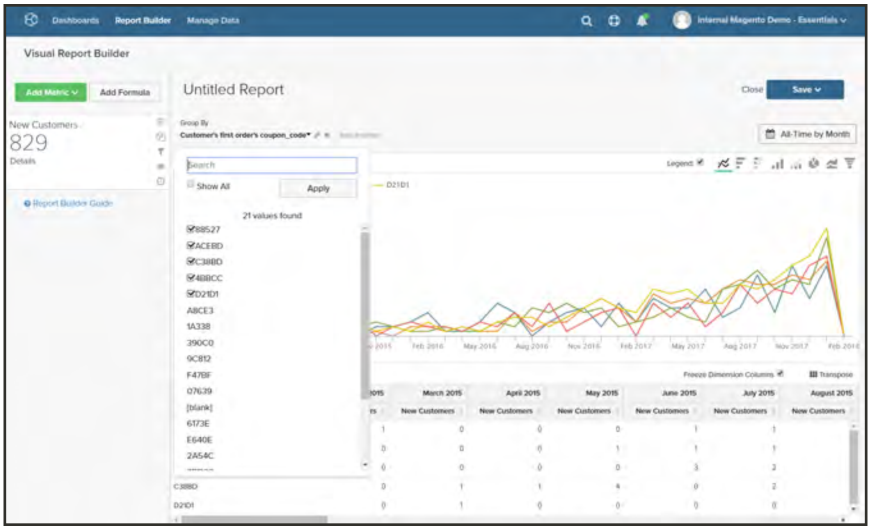
   For this example, the system found five coupon codes that were used by customers while placing their first order.



Group by

2. The Group By detail lists each coupon used by customers. The coupons that were used to place the initial order are marked with a checkbox The chart now has multiple colored lines that represent the each coupon that was used for a first order. The legend is color-coded to correspond to each row of data.

   Click **Apply** to close the Group By detail.



Multiple Dimensions

3. Hover over a few data points on each line to see the number of customers during the month who used that coupon while placing their first order.

4. The table of data now has an addition dimension, with a column for each month, and a row for each coupon code.

	February 2015	March 2015	April 2015	May 2015	June 2015	July 2015	August 2015
Customer's first order's coupon_code	New Customers	New Customers	New Customers	New Customers	New Customers	New Customers	New Customers
4BBCC	1	0	0	0	1	1	1
88527	0	0	0	1	1	1	2
ACEBD	0	0	0	0	3	2	0
C38BD	0	1	1	4	0	2	0
D21D1	0	1	0	0	0	0	2

Group by Table Data

5. Click the **Transpose** ( ) control in the upper-right corner of the table to change the orientation of the data.

The axis of the data is flipped, and the table now has a column for each coupon code, and a row for each month. You might find this orientation easier to read.

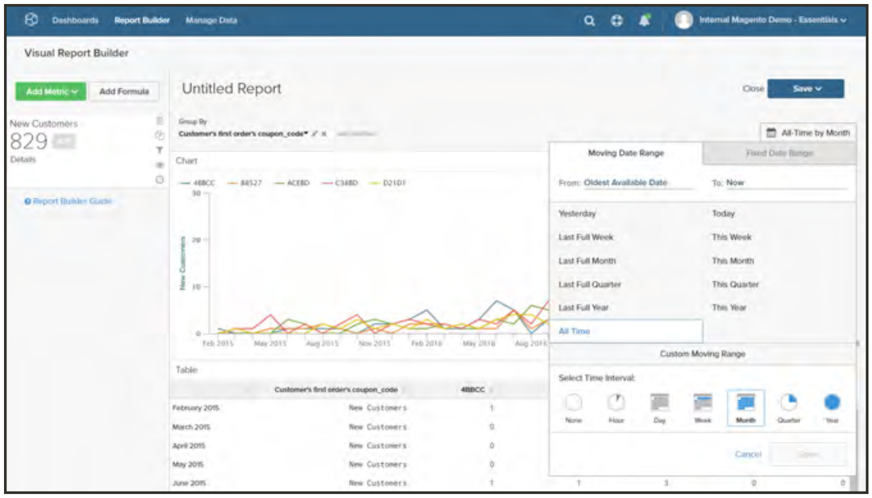
	Customer's first order's coupon_code	4BBCC	88527	ACEBD	C38BD	D21D1
February 2015	New Customers	1	0	0	0	0
March 2015	New Customers	0	0	0	1	1
April 2015	New Customers	0	0	0	1	0
May 2015	New Customers	0	1	0	4	0
June 2015	New Customers	1	1	3	0	0
July 2015	New Customers	1	1	2	2	0
August 2015	New Customers	1	2	0	0	2
September 2015	New Customers	1	1	0	2	1
October 2015	New Customers	0	0	2	4	3
November 2015	New Customers	2	1	3	0	1
December 2015	New Customers	2	0	2	2	2
January 2016	New Customers	3	2	1	3	1

Transposed Data

Date Range

The Date Range control shows the current date range and time interval settings, and is located just above the chart to the right.

1. Click the **Date Range** control, which in this example is set to "All-Time by Month."



Date Range

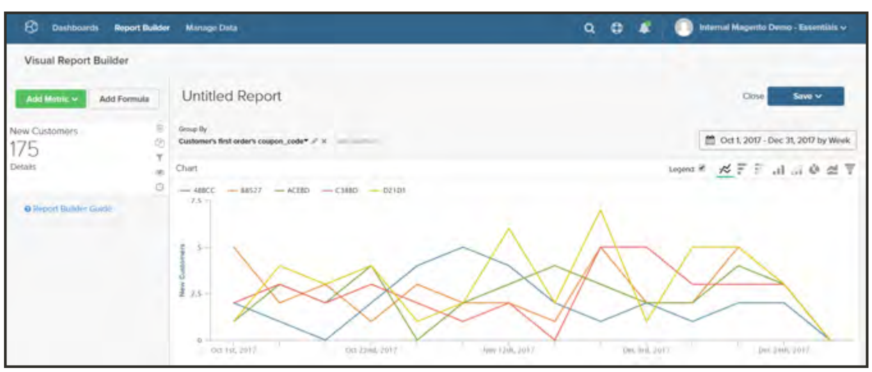
2. Make the following changes:

   a. To zoom in for a closer view, change the date range to **Last Full Quarter**.

   b. Under **Select Time Interval,** choose "Week."

   c. When complete, tap **Save**.

The report now includes only the data for the last quarter, by week.

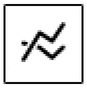


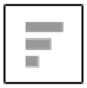
Report for Last Quarter by Week

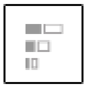
Chart Type

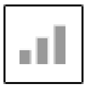
Click the controls in the upper-right corner to find the best chart for the data.

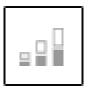
> Some chart types are not compatible with multidimensional data.

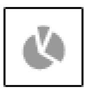

Line graph


Horizontal Bar


Horizontal Stacked Bar


Vertical Bar


Vertical Stacked Bar


Pie


Area


Funnel

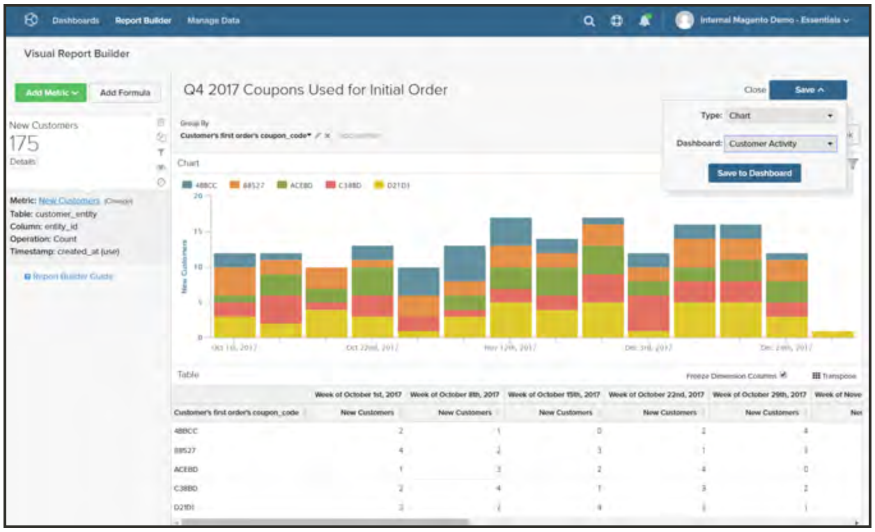
5. To give the report a **title**, replace the “Untitled Report” text at the top of the page with a descriptive title.

6. In the upper-right corner, tap **Save**. Then do the following:

   a. For **Type**, accept the default setting, “Chart.”

   b. Choose the **Dashboard** where the report is to be available.

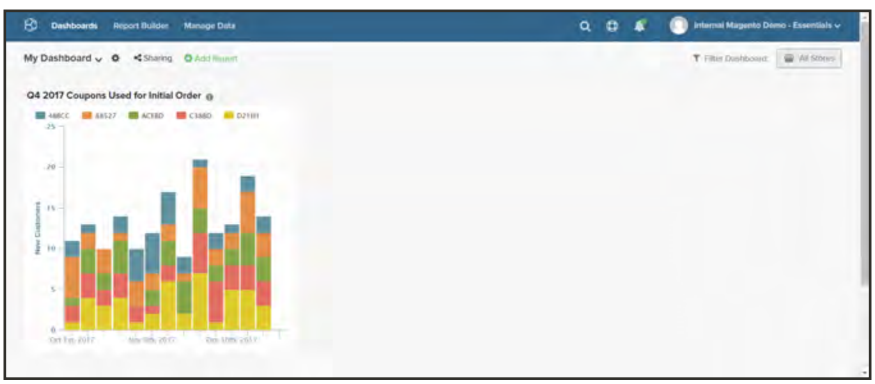
   c. Tap **Save to Dashboard**.



Save to Dashboard

7. To view the chart in a dashboard, do one of the following:

   - Click **Go to Dashboard** in the message at the top of the page.
   - In the menu, choose **Dashboards**. Click the name of the current dashboard to display the list. Then, click the name of the dashboard where the report was saved.



Report in Dashboard

Filters

One or more filter(s) can be added to limit the data that is used to product a report. Each filter is an expression that includes a column from the associated table, an operator, and a value. For example to include only repeat customers, you might create a filter that includes only customers who have placed more than one order. Multiple filters can be used with logical "AND/OR" operators to add logic to the report.

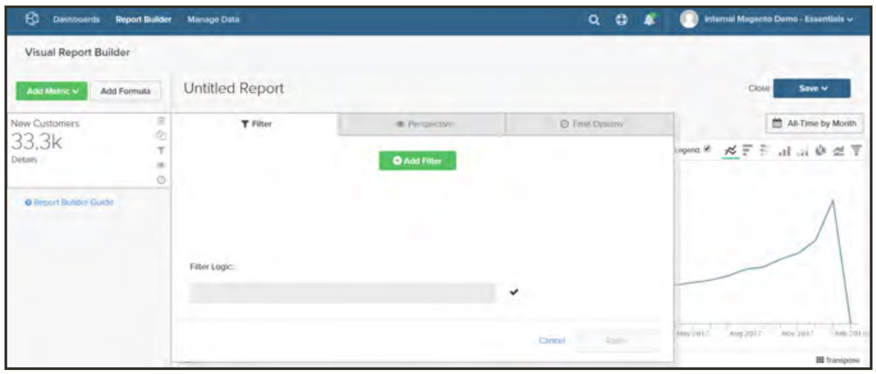
> A report can have a maximum of 3,500 data points. To reduce the number of data points, use a filter to reduce the amount of data that is used to generate the report.

Magento BI includes a selection of filters that you can use “out of the box,” or modify to suit your needs. There is no limit to the number of filters you can create.

To add a filter

1. In the chart, hover over each data point. In this report, each data point shows the total number of customers for the month.

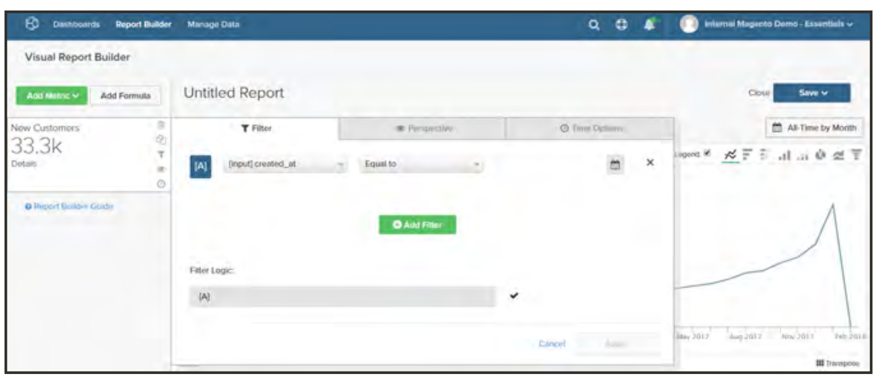
2. In the panel on the left, click the **Filters** ( ) icon.



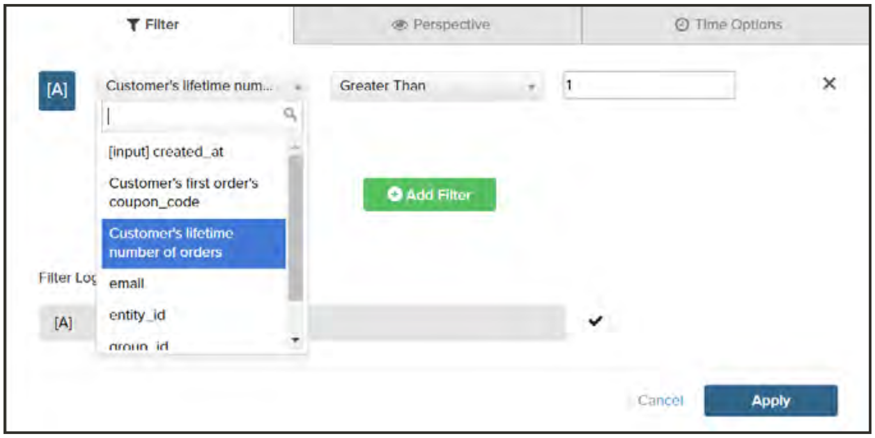
Add Filter

3. Tap **Add Filter**.

   Filters are numbered alphabetically, and the first is [A]. The first two parts of the filter are drop-down lists of options, and the third part is a value.

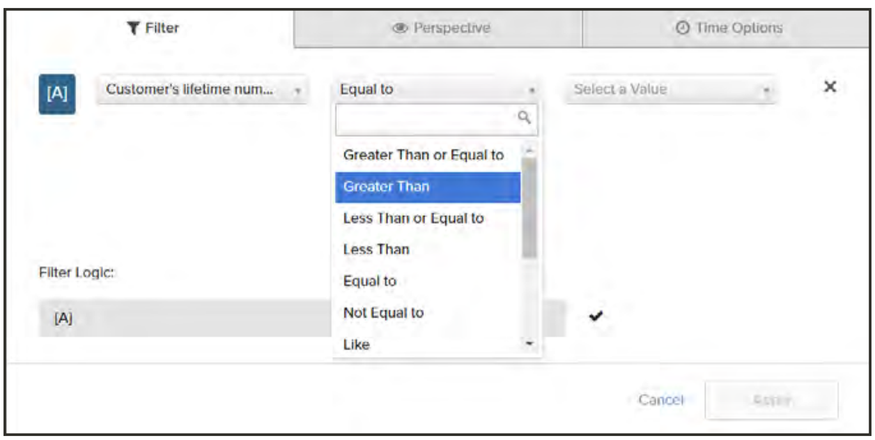


a. Click the first part of the filter, and choose the column that you want to use as the subject of the expression.



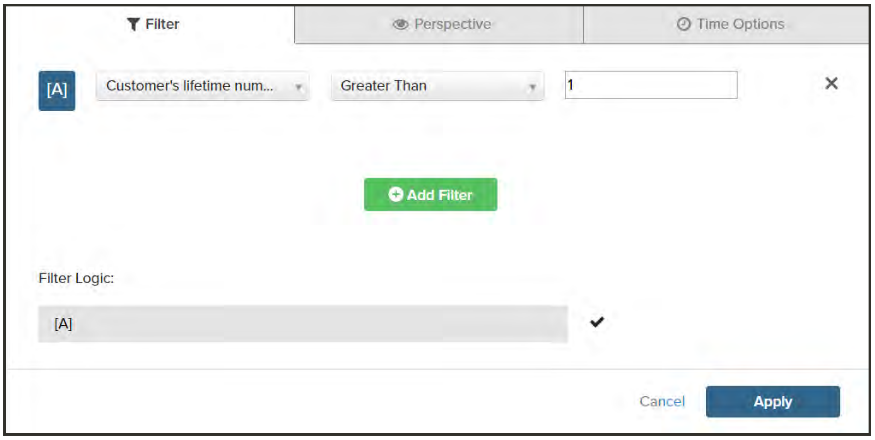
Choose First Part of Filter

b. Click the second part of the filter, and choose the operator.



Choose the Operator

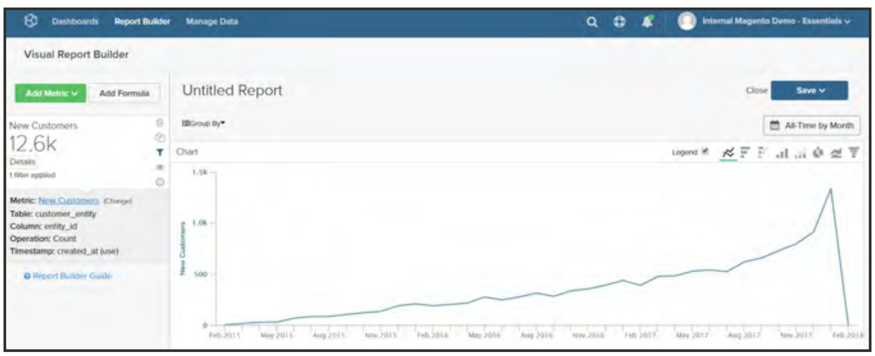
c. In the third part of the filter, enter the value that is needed to complete the expression.



Enter the Value

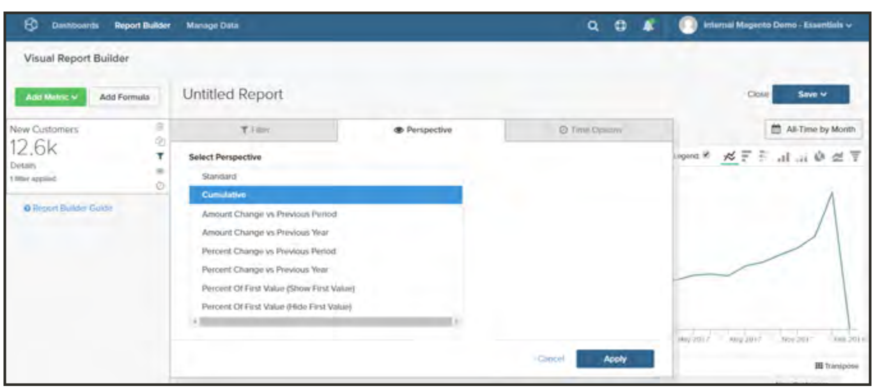
d. When the filter is complete, tap **Apply**.

The report now includes only repeat customers, and the number of customer records retrieved for the report has been reduced from 33K to 12.6k.



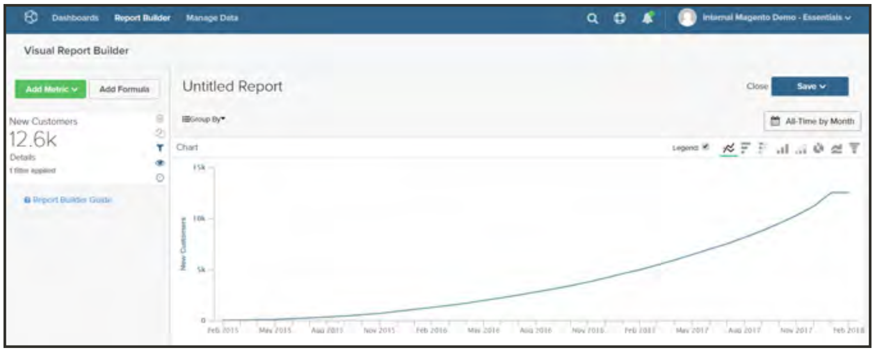
Filtered Report

4. In the sidebar, click the **Perspective** ( ) icon.



Perspective

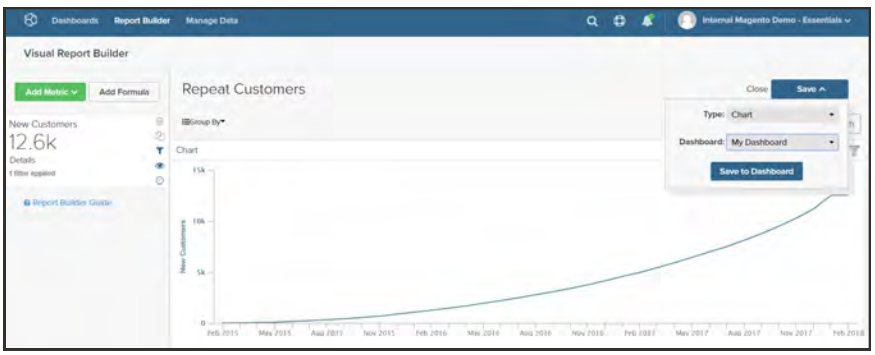
5. In the list of settings, choose **Cumulative**. Then, tap **Apply**.



Cumulative Perspective

The Cumulative perspective distributes the change over time, rather than showing the jagged up and downs for each month.

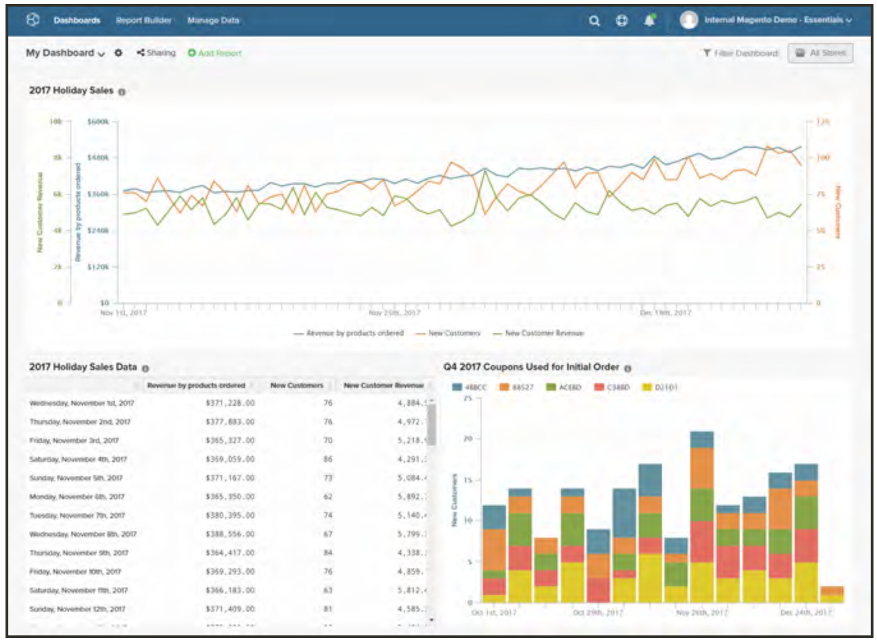
6. Enter a **Title** for the report. Then, **Save** it as a **Chart** to your dashboard.



Save to Dashboard

Formulas

A formula combines multiple metrics and mathematical logic to answer a question. For example, how much of the revenue per product during the holiday season was generated by new customers?



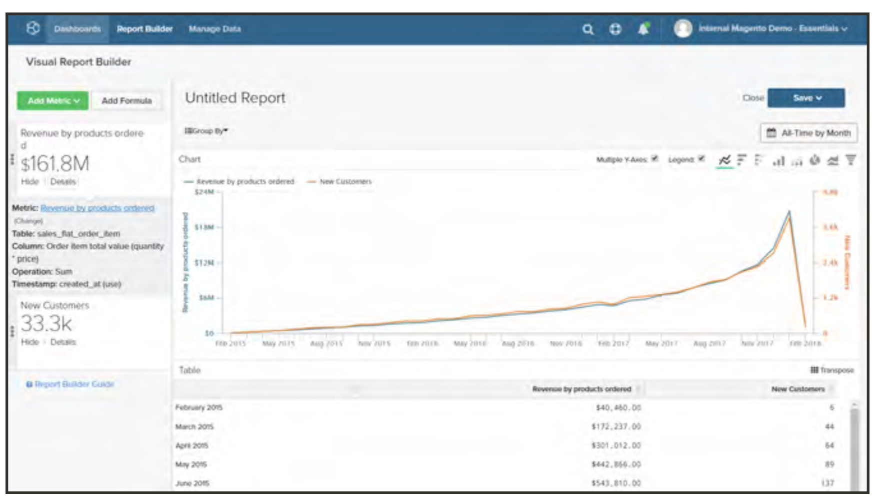
Holiday Sales in Dashboard

Step 1: Create the Basic Report

1. In the menu, choose **Report Builder**.
2. Tap **Add Metric**, and choose the first metric for the report.

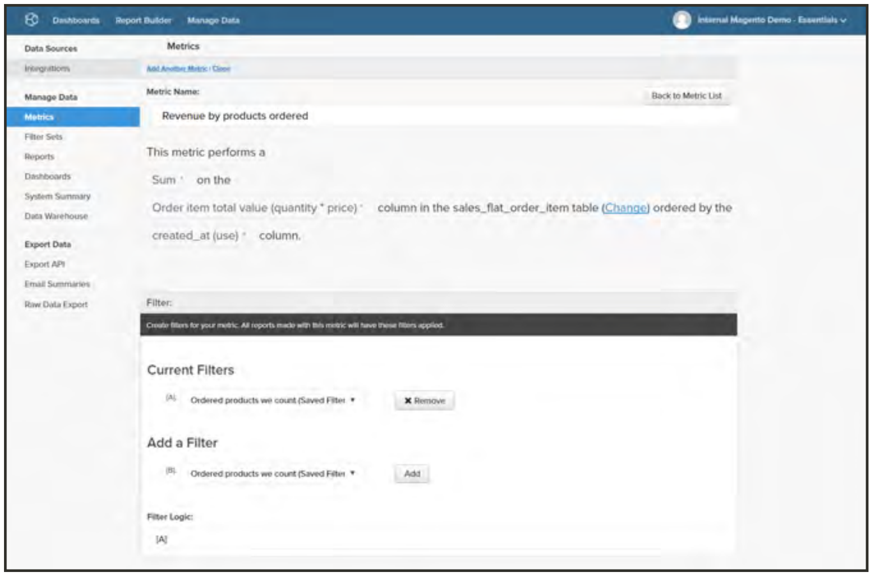
   For this example, the "Revenue by products ordered" metric is used.
3. Tap **Add Metric** again, and choose the second metric for the report.

   For this example, the "New Customers" metric is used.
4. In the sidebar, click **Details** to display information about each metric.



Revenue by Products Ordered

5. In the sidebar, click the name of each metric to open the settings page in a new browser tab. Scroll down to see each component of the metric, including the metric query, filter, and dimensions.



Metric Settings

6. To return to your report, click the previous browser tab.

7. In the chart, hover over a few data points on each line to see the amounts associated with each metric.

Step 2: Add a Formula

1. At the top of the sidebar, tap **Add Formula**.

   The formula box shows the metrics as available inputs A and B, and includes an input box where you can enter the formula.

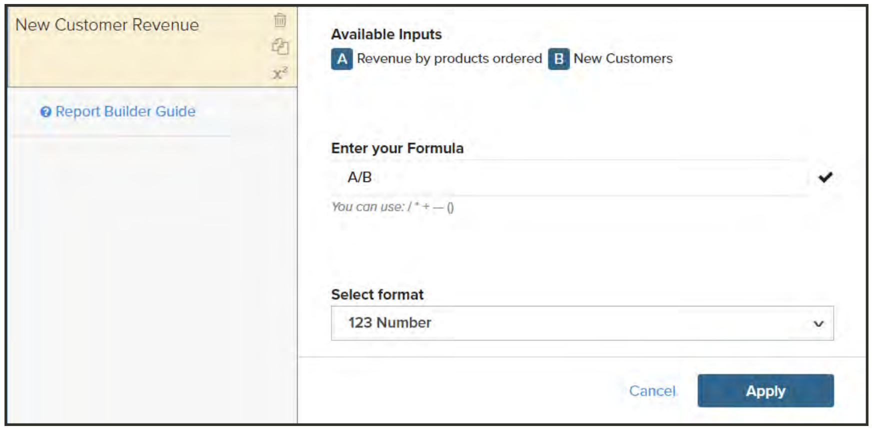
   Do the following:

   a. In the **Enter your Formula** input box, enter “A/B”.

      This will divide the revenue by products ordered by the number of new customers.

   b. Set **Select format** to “123Number.”

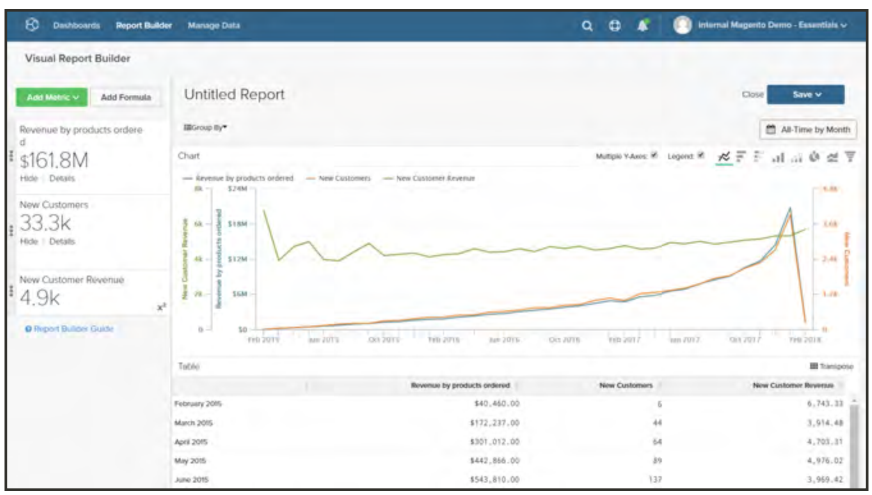
   c. In the sidebar, replace “Untitled” with a name for the formula.



Formula Settings

2. When complete, tap **Apply**.

   The report now has a new line for the formula, “New Customer Revenue,” and the sidebar shows the total amount of revenue generated by new customers.



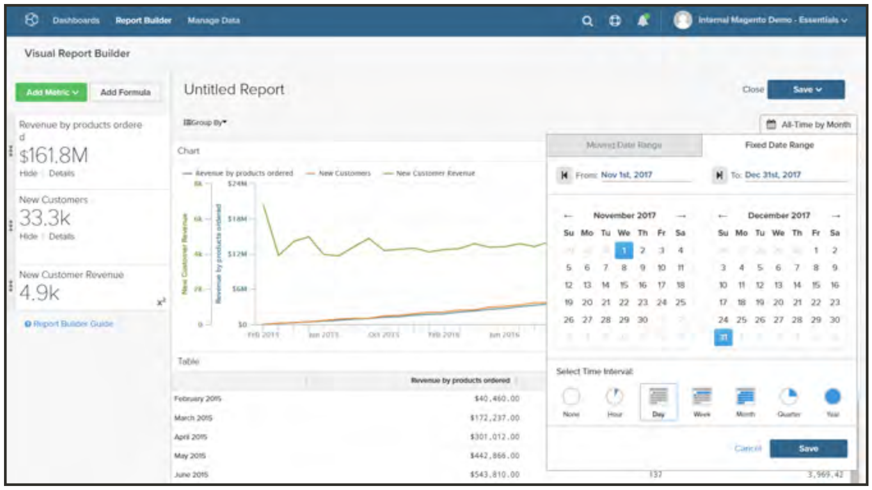
Report with Formula

Step 3: Add a Date Range

1. Click the **Date Range** control in the upper-right corner.
2. On the **Fixed Date Range** tab, do the following:
   a. On the calendars, choose the date range.

      For this example, the holiday season is from November 1 through December 31.

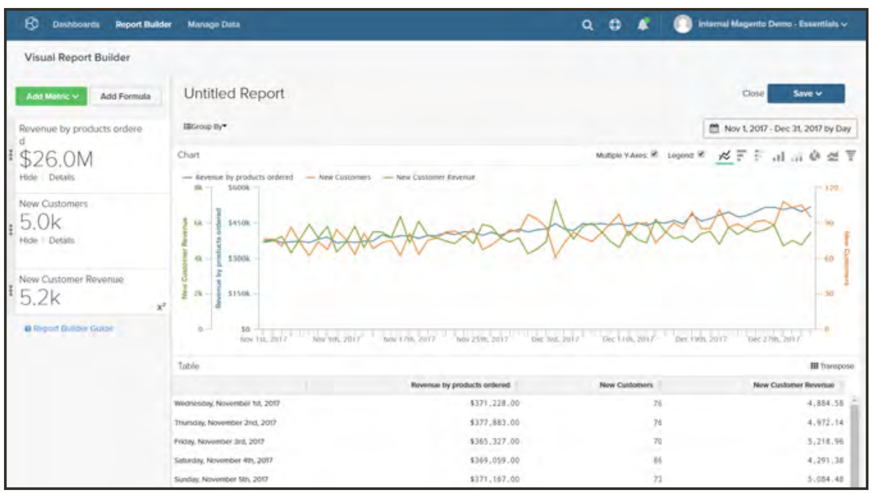
   b. Under **Select Time Interval**, choose “Day.”



Fixed Date Range

c. When complete, click **Apply**.

The report is now limited to the holiday season, with a data point for each day.



Fixed Date Range

Step 4: Save the Report

In this step, you will save the report as a chart, and also as a table.

1. Click the “Untitled Report” text at the top of the page, and enter a descriptive title. For this example, the report title is “2017 Holiday Sales.”

   Then, do the following:

   a. In the upper-right corner, tap **Save**.

   b. For **Type**, accept the default setting, “Chart.”

   c. Choose the **Dashboard** where the report is to be available.

   d. Tap **Save to Dashboard**.

2. Click the report title, and change the name. For this example, the report title is changed to "2017 Holiday Sales Data"

   Then, do the following:

   a. In the upper-right corner, tap **Save a Copy**.

   b. Set **Type** to "Table."

   c. Choose the **Dashboard** where the report is to be available.

   d. Tap **Save a Copy to Dashboard**.

3. To see the reports in your dashboard, do one of the following:

   - Click **Go to Dashboard** in the message at the top of the page.
   - In the menu, choose **Dashboards**. Click the name of the current dashboard to display the list. Then, click the name of the dashboard where the report was saved.

Manage Data

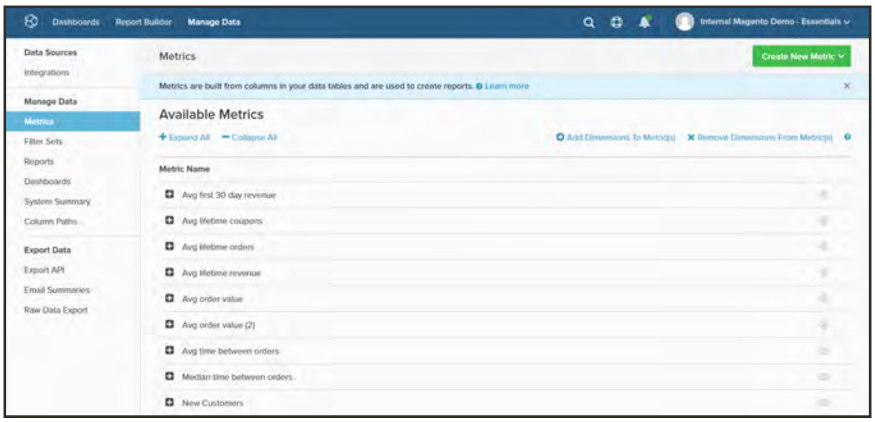
Manage Data provides access to a variety of tools for managing integrations, report and chart data, dashboards, and exports.

To access Manage Data:

1. In the menu, choose **Manage Data**.

2. In the sidebar, choose the topic that you want under the following headings:

   - Data Sources
   - Manage Data
   - Export Data



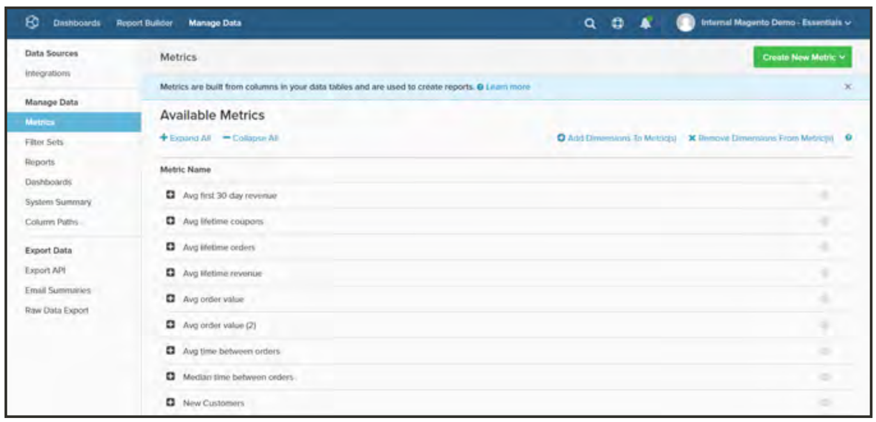
Manage Data

Metrics

Each report includes at least one query that defines the set of data, or “metrics” for the report. The metrics statement describes the data that is to be retrieved, and consists of an operator, column, table, and sorting order. Magento BI includes a set of default, “out of the box” metrics that can be easily customized. You can create an unlimited number of custom metrics.

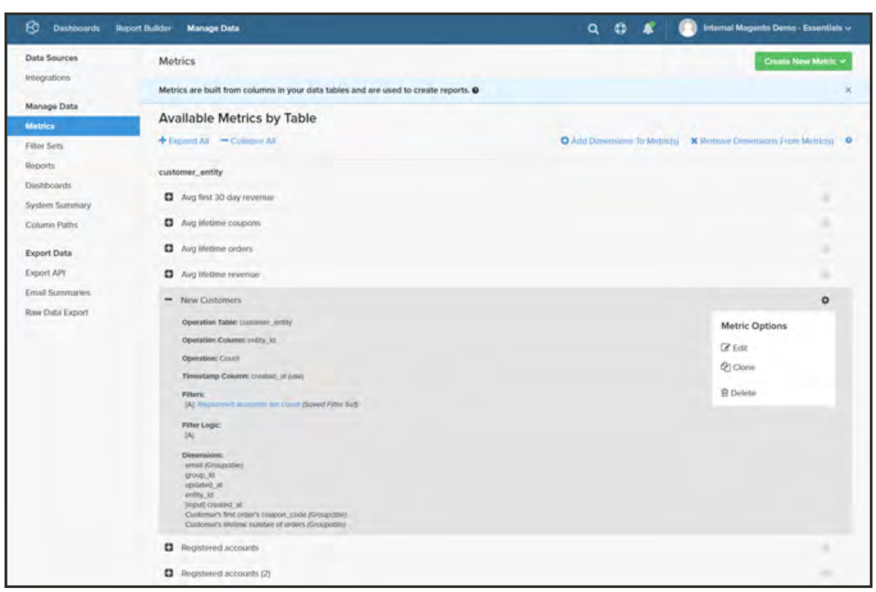
To access the available metrics:

1. On the menu, choose **Manage Data**.
2. In the sidebar, choose **Metrics**.



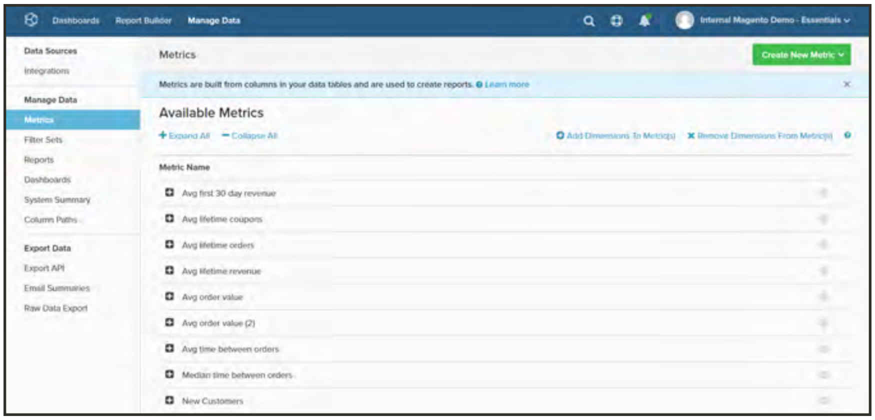
Metrics

3. Click the name of any metric to display detailed information. To show the Metric Options, click the **Settings** ( ) icon on the right.



Metric Detail

4. Click **Details** to display more information about the metric.



Metrics

Default Metrics by Table

FIELD	DESCRIPTION	
customer_entity		
Avg first 30 day revenue	**Average** on the **Customer's first 30 day revenue** column in the **customer_entity** table (Change) ordered by the **created_at (use)** column	
	Filter A	Seconds since customer's first order date >=2592000
	Filter B	Registered accounts we count (Saved Filter Set)
Avg lifetime coupons	**Average** on the **Customer's lifetime number of coupons** column in the **customer_entity** table (Change) ordered by the **created_at (use)** column	
	Filter A	Registered accounts we count (Saved Filter Set)
Avg lifetime orders	**Average** on the **Customer's lifetime number of orders** column in the **customer_entity** table (Change) ordered by the **created_at (use)** column	
	Filter A	Registered accounts we count (Saved Filter Set)

Default Metrics by Table (cont.)

FIELD	DESCRIPTION	
Avg Lifetime revenue	**Average** on the **Customer's lifetime number of orders** column in the **customer_entity** table (Change) ordered by the **created_at (use)** column	
	Filter A	Registered accounts we count (Saved Filter Set)
New Customers	**Count** on the **entity_id** column in the **customer_entity** table (Change) ordered by the **created_at (use)** column	
	Filter A	Registered accounts we count (Saved Filter Set)
Registered accounts	**Count** on the **entity_id** column in the **customer_entity** table (Change) ordered by the **created_at (use)** column	
	Filter A	Registered accounts we count (Saved Filter Set)
customer_group		
New Metric	**Count** on the **customer_group_id** column in the **customer_group** table (Change) ordered by the **[NONE]** column	
sales_flat_order		
Avg order value	**Average** on the **base_grand_total** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
Avg time between orders	**Average** on the **Seconds since previous order** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)

Default Metrics by Table (cont.)

FIELD	DESCRIPTION	
Median time between orders	**Median** on the **Seconds since previous order** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
New Metric 2 (Number of orders)	**Count** on the **entity_id** column in the **sales_flat_order** table (Change) ordered by the **[input] created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
Orders	**Count** on the **entity_id** column in the **sales_flat_order** table (Change) ordered by the **[input] created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
Revenue	**Sum** on the **base_grand_total** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
Shipping	**Sum** on the **base_shipping_amount** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
Tax	**Sum** on the **base_tax_amount** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
Unique Customers	**Count Distinct Values** on the **customer_email** column in the **sales_flat_order** table (Change) ordered by the **created_at (use)** column	
	Filter A	Orders we count (Saved Filter Set)
sales_flat_order_item		

Default Metrics by Table (cont.)

FIELD	DESCRIPTION	
Products Ordered	**Sum** on the **qty_ordered** column in the **sales_flat_order_item** table (Change) ordered by the **created_at (use)** column	
	Filter A	Ordered products we count (Saved Filter Set)
Revenue by products ordered	**Sum** on the **Order item total value (quantity * price)** column in the **sales_flat_order_item** table (Change) ordered by the **created_at (use)** column	
	Filter A	Ordered products we count (Saved Filter Set)

Metric Options

FIELD	DESCRIPTION
Operator	Average Count Sum Average Maximum Value Minimum Value Count Distinct Values Median First Quartile Third Quartile Tenth Percentile Ninetieth Percentile
Table	addresses categories customer_entity customer_group sales_flat_order sales_flat_order_address sales_flat_order_item

Metric Options (cont.)

FIELD	DESCRIPTION	
Target Column by Table	customer_entity	Customer’s first 30 day revenue Customer’s lifetime number of coupons Customer’s lifetime number of orders Customer’s lifetime revenue entity_id group_id Seconds since customer’s first order date
	customer_group	customer_group_id
	sales_flat_order	base_grand_total base_shipping amount base_tax_amount billing_address_id Customer’s lifetime number of coupons Customer’s lifetime number of orders Customer’s lifetime revenue customer_id entity_id Number of items in order Seconds between customer’s first order date and this order Seconds since previous order shipping_address_id store_id
	sales_flat_order_ item	base_price Customer’s lifetime number of orders Customer’s lifetime revenue item_id Order item total value (quantity * price) order_id product_id qty_ordered
Order Column	[NONE] created_at (use) updated_at [input] created at	

Filter Sets

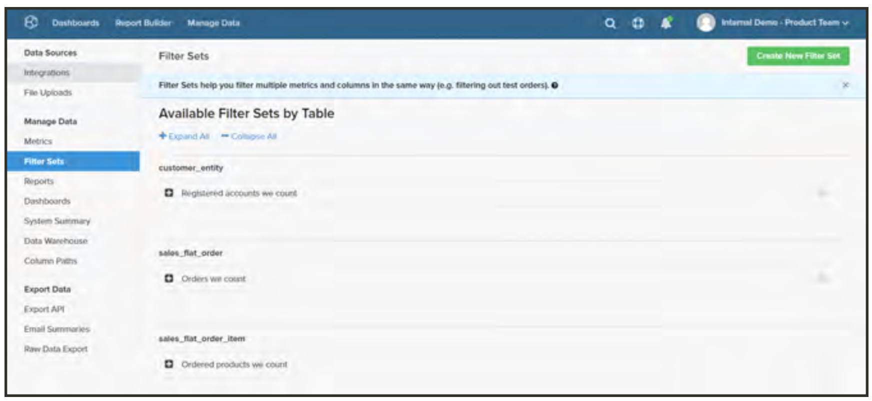
A filter set is based on a table, and can include multiple statements with logic to select the data for a report or chart. Magento BI includes several default filter sets that you can use “as is” or modify. There is no limit to the number of filter sets that you can create.

A filter set can be applied to any metric that uses the same table. To learn more, see Creating filter sets for metrics in the Magento BI Help Center.

To see the available filter sets:

1. On the menu, choose **Manage Data**. Then in the sidebar under Manage Data, choose **Filter Sets**.

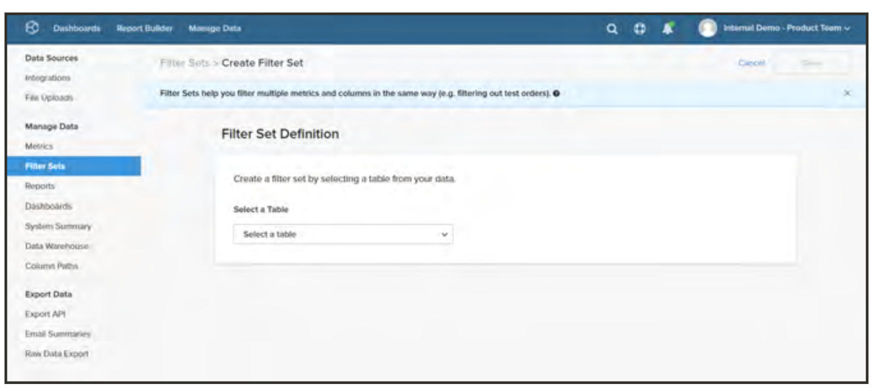
2. Click **Expand All** to display the detail of each filter set that is currently available.



Filter Sets

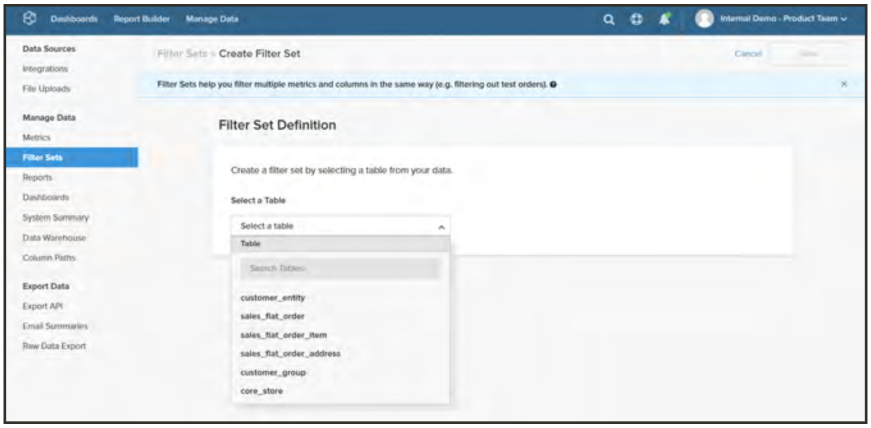
To create a new filter set:

1. In the upper-right corner of the Filter Sets page, tap **Create New Filter Set**. Then, do the following:



Create Filter Set

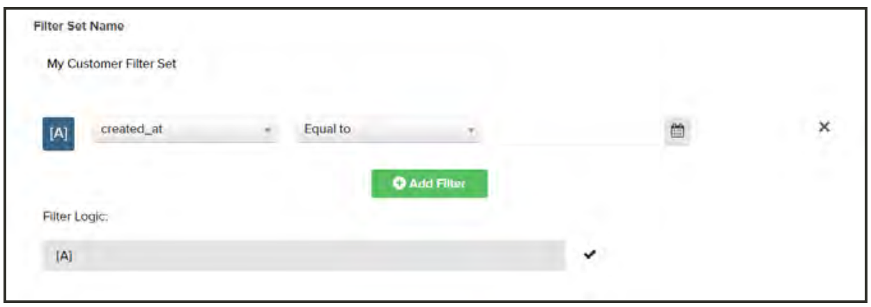
a. Under **Select a Table**, choose the table upon which the filter set is based.



Select a Table

b. Enter the **Filter Set Name**.

c. Tap **Add Filter**. Then, follow the instructions to build each part of the expression.



Add Filter

d. To add another filter, tap **Add Filter**. Then, build the expression.

e. To complete the **Filter Logic**, use the AND/OR operators to describe how multiple statements in the filter are to be applied.

2. When complete, tap **Save**.

The new filter appears in the list of Available Filter Sets by Table.

Default Filters by Table

FIELD	DESCRIPTION
customer_entity	Registered accounts we count (Saved Filter Set)
	created_at (use)
	Customer's first 30 day revenue
	Customer's first order's billing region
	Customer's first order's coupon code

Default Filters by Table (cont.)

FIELD	DESCRIPTION
	Customer’s first order date Customer’s group code Customer’s lifetime number of coupons Customer’s lifetime number of orders Customer’s lifetime revenue email entity_id group_id Seconds since customer’s first order date updated_at [input] created at
sales_flat_order	Orders we count (Saved Filter Set) base_grand_total base_shipping_amount base_tax_amount Billing address city Billing address country Billing address region billing_address_id coupon_code created_at (use) Customer’s creation date Customer’s first order date Customer’s group code Customer’s lifetime number of coupons Customer’s lifetime revenue Customer’s order number Customer’s order number (previous-current) customer_email customer_id entity_id Is customer’s last order? Number of items in order order_currency_code Seconds between customer’s first order date and this order

Default Filters by Table (cont.)

FIELD	DESCRIPTION
	Seconds since previous order
sales_flat_order_item	Ordered products we count(Saved Filter Set) base_price created_at (use) Customer's lifetime number of orders Customer's lifetime revenue Customer's order number item_id name Order's coupon_code Order item total value (quantity * price) order_id product_id product_type qty_ordered sku updated_at [input] created_at

Export Data

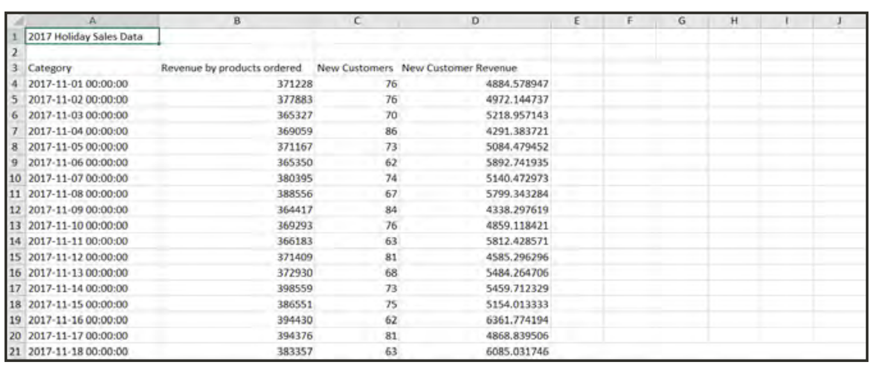
Raw report data can be exported from the Magento BI data warehouse to a CSV or Excel file. You can also create a list of raw, exported data from tables that refreshes every 15 seconds to ensure that the data is always current.

To export report data:

1. In the header of a report, click the **Settings** (⚙) control.

Report Settings

2. Choose one of the following options:
   - Full CSV Export
   - Full Excel Export
3. Watch the bottom of the window for the export file. Then, open the file.

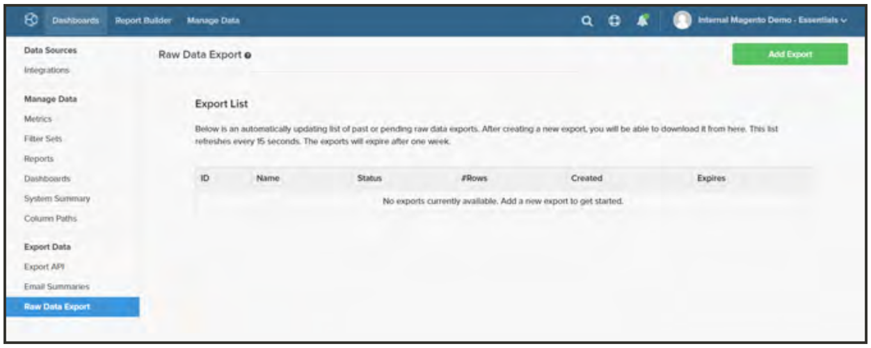


	A	B	C	D
1	2017 Holiday Sales Data			
2				
3	Category	Revenue by products ordered	New Customers	New Customer Revenue
4	2017-11-01 00:00:00	371228	76	4884.578947
5	2017-11-02 00:00:00	377883	76	4972.144737
6	2017-11-03 00:00:00	365327	70	5218.957143
7	2017-11-04 00:00:00	369059	86	4291.383721
8	2017-11-05 00:00:00	371167	73	5084.479452
9	2017-11-06 00:00:00	365350	62	5892.741935
10	2017-11-07 00:00:00	380395	74	5140.472973
11	2017-11-08 00:00:00	388556	67	5799.343284
12	2017-11-09 00:00:00	364417	84	4338.297619
13	2017-11-10 00:00:00	369293	76	4859.118421
14	2017-11-11 00:00:00	366183	63	5812.428571
15	2017-11-12 00:00:00	371409	81	4585.296296
16	2017-11-13 00:00:00	372930	68	5484.264706
17	2017-11-14 00:00:00	398559	73	5459.712329
18	2017-11-15 00:00:00	386551	75	5154.013333
19	2017-11-16 00:00:00	394430	62	6361.774194
20	2017-11-17 00:00:00	394376	81	4868.839506
21	2017-11-18 00:00:00	383357	63	6085.031746

Exported Data in Excel

To create an export list:

1. On the menu, choose **Manage Data**.
2. In the sidebar under **Export Data**, choose **Raw Data Export**.



Raw Data Export

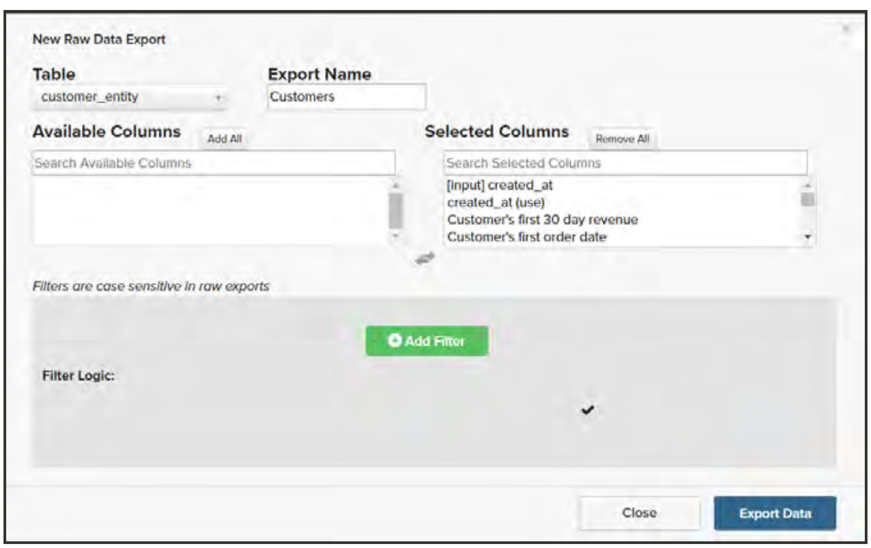
3. Tap **Add Export**. Then, do the following:

   a. Choose the **Table**.

Choose Table

   b. Enter the **Export Name**.

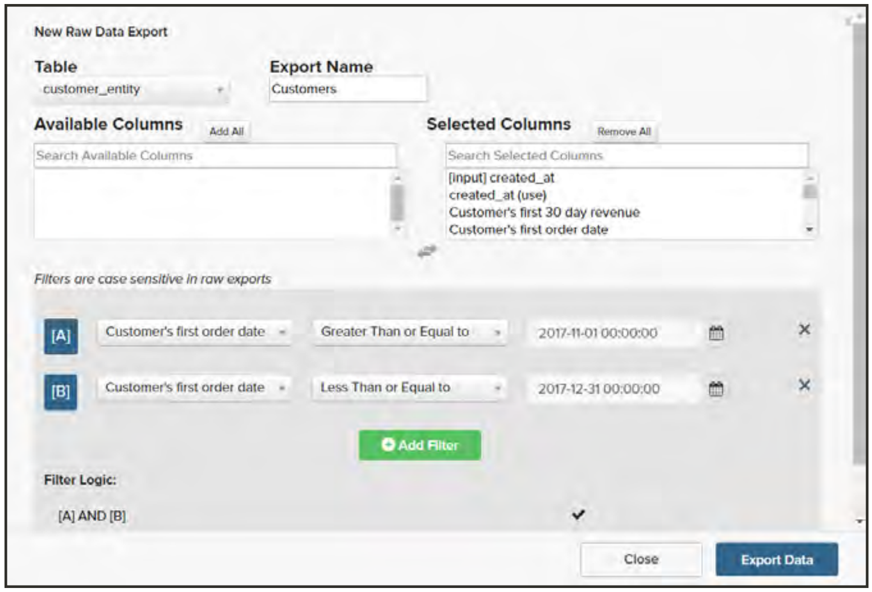
   c. Under **Available Columns**, tap **Add All**.



Choose Columns

   d. If you want to add a filter, tap **Add Filter**. Then, follow the instructions to create a filter for the exported data.

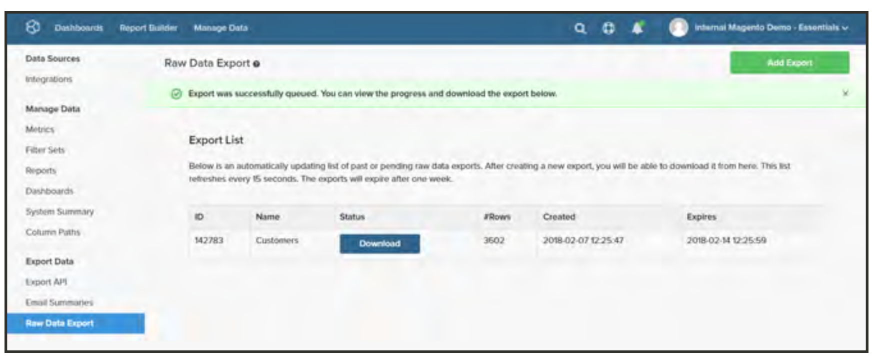
The filters in this example includes all customers who placed their first order during the 2018 holiday season.



Filters

4. When ready, tap **Export Data**.

   Look for a message that says the export is successfully queued. The export appears in the list when the process is complete.



Export List

5. To download the exported data, tap **Download**. Then, look for the exported zip file at the bottom of the window.

CHAPTER 90:

New Relic Reporting

New Relic is a SaaS based subscription service that provides detailed real-time visibility into business and performance metrics for data-driven decision making.

Step 1: Sign Up for a New Relic Account

1. Visit the New Relic website, and sign up for an account. You can also sign up for a free trial account.

2. Follow the instructions on the site. When prompted choose the product that you want to install first.

3. While you are in your account, locate the following credentials that you will need to complete the configuration:

Account ID	From your New Relic account dashboard, the Account ID is the number in the URL after: `/accounts`
Application ID	From your New Relic account dashboard, tap New Relic APM. In the menu, choose Applications. Then, choose your application. The Application ID is the number in the URL after: `/applications/`
New Relic API Key	From your New Relic account dashboard, tap Account Settings. In the menu on the left under Integrations, choose Data Sharing. Your API key can be created, regenerated, or deleted from this page.
Insights API Key	From your New Relic account dashboard, tap Insights. In the menu on the left under Administration, choose API Keys. Your Insights API Key(s) appear on this page. If necessary, click the plus sign (+) next to Insert Keys to generate a key.

Step 2: Install the New Relic Agent on Your Server

To use New Relic APM Pro to gather and transmit data, the PHP agent must be installed on your server.

1. When prompted to choose a web agent, tap **PHP**.

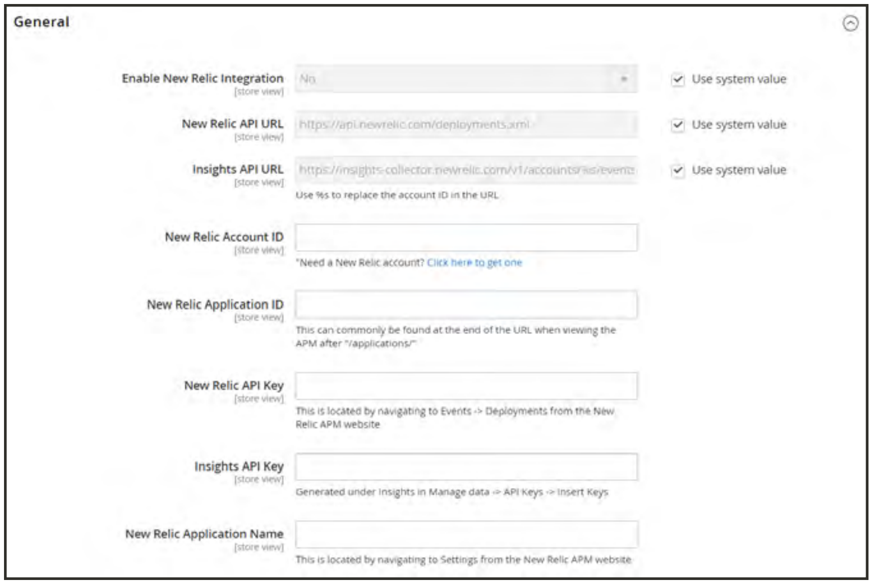
2. Follow the instructions to set up the PHP agent on your server. If you need help, see: New Relic for PHP.

3. Make sure that cron is running on your server. To learn more, see: Configure and run cron.

Step 3: Configure Your Store

1. On the Admin menu, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **General**, choose **New Relic Reporting**. Then, do the following:



New Relic Reporting

   a. Set **Enable New Relic Integration** to "Yes."

   b. In the **Insights API URL**, replace the percent (% symbol with your New Relic Account ID.

   c. Enter your **New Relic Account ID**.

   d. Enter your **New Relic Application ID**.

   e. Enter your **New Relic API Key**.

   f. Enter you **Insights API Key**.

3. In the **New Relic Application Name** field, enter a name to identify the configuration for internal reference.

4. When complete, tap **Save Config**.

Step 4: Enable Cron for New Relic Reporting

1. Expand the **Cron** section.

Cron

2. Set **Enable Cron** to"Yes.

3. When complete, tap **Save Config**.

New Relic Queries

New Relic Insights data is based on statements that are written in New Relic Query Language (NRQL), as well as any custom parameters that you might include. Data can be returned from adhoc queries, or by queries saved to your dashboard. To learn more, see the NRQL Reference in the New Relic documentation.

Admin Events

Active Admin Users

Widget Name:	Active Admin Users
Description:	Returns the number of active admin users.

```
SELECT uniqueCount(AdminId)

FROM Transaction

WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

Currently Active Admins

Widget Name:	Currently Active Admins
Description:	Returns the names of active admin users.

```
SELECT uniques(AdminName)

FROM Transaction

WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

Recent Admin Activity

Widget Name:	Recent Admin Activity
Description:	Returns the number of recent admin actions.

```
SELECT count(AdminId)

FROM Transaction

WHERE appName ='<your_app_name>' FACET AdminName SINCE 1 day ago
```

Latest Admin Activity

Widget Name: Latest Admin Activity

Description: Returns detail information about recent admin actions, including the admin username, duration, and application name.

```
SELECT AdminName, duration, name

FROM Transaction

WHERE appName='<your_app_name>' AND AdminName IS NOT NULL

AND AdminName != 'N/A' LIMIT 50
```

Cron Events

Category Count

Widget Name: Category Count

Description: Returns the number of application events by category during the specified time period.

```
SELECT average(CatalogCategoryCount)

FROM Cron

WHERE CatalogCategoryCount IS NOT NULL

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

Current Catalog Count

Widget Name: Current Catalog Count

Description: Returns the average number of application events in the catalog by category during the specified time period.

```
SELECT average(CatalogCategoryCount)

FROM Cron

WHERE CatalogCategoryCount IS NOT NULL

AND CatalogCategoryCount > 0

AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

Active Products

Widget Name: Active Products

Description: Returns the number of application events by product during the specified time period.

```
SELECT average(CatalogProductActiveCount)

FROM Cron

WHERE CatalogProductActiveCount IS NOT NULL

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

Active Product Count

Widget Name: Active Product Count

Description: Returns the average number of active application events by product during the specified time period.

```
SELECT average(CatalogProductActiveCount)

FROM Cron

WHERE CatalogProductActiveCount IS NOT NULL

AND CatalogProductActiveCount > 0

AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

Configurable Products

Widget Name: Configurable Products

Description: Returns the average number of application events forconfigurable products during the specified time period.

```
SELECT average(CatalogProductConfigurableCount)

FROM Cron

WHERE CatalogProductConfigurableCount IS NOT NULL

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

Configurable Product Count

Widget Name: Configurable Product Count

Description: Returns the average number of application events by configurable product during the specified time period.

```
SELECT average(CatalogProductConfigurableCount)

FROM Cron

WHERE CatalogProductConfigurableCount IS NOT NULL

AND CatalogProductConfigurableCount > 0

AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

Product Count (all)

Widget Name:	Product Count (all)
Description:	Returns the total number of application events for all products.

```
SELECT average(CatalogProductCount)

FROM Cron

WHERE CatalogProductCount IS NOT NULL

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

Current Product Count (all)

Widget Name:	Current Product Count (all)
Description:	Returns the average number of application events for all products during the specified time period.

```
SELECT average(CatalogProductCount)

FROM Cron

WHERE CatalogProductCount IS NOT NULL

AND CatalogProductCount > 0

AND appName = '<your_app_name>>' SINCE 2 minutes ago LIMIT 1
```

Customer Count

Widget Name:	Customer Count
Description:	Returns the average number of application events by customer.

```
SELECT average(CustomerCount)

FROM Cron

WHERE CustomerCount IS NOT NULL
```

```
AND CustomerCount > 0

AND appName = '<your_app_name>' TIMESERIES 2 minutes
```

Currrent Customer Count

Widget Name: Current Customer Count

Description: Returns the average number of customers during the specified time period.

```
SELECT average(CustomerCount)

FROM Cron

WHERE CustomerCount IS NOT NULL

AND CustomerCount > 0

AND appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

Module Status

Widget Name: Module Status

Description: Returns the average number of times application modules are enabled, disabled, or installed during the specified time period.

```
SELECT average(ModulesDisabled), average(ModulesEnabled), average

(ModulesInstalled)

FROM Cron

WHERE appName = '<your_app_name>' TIMESERIES 2 minutes
```

Current Module Status

Widget Name: Current Module Status

Description: Returns the average number of times modules were enabled, disabled, or installed during the specified time period.

```
SELECT average(ModulesDisabled), average(ModulesEnabled), average

(ModulesInstalled)

FROM Cron

WHERE appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

Website and Store Counts

Widget Name: Website and Store Counts

Description: Returns the average number of application events by website and store during the specified time period.

```
SELECT average(StoreViewCount), average(WebsiteCount)

FROM Cron

WHERE appName = '<your_app_name>' TIMESERIES 2 minutes
```

Current Website and Store Counts

Widget Name: Current Website and Store Counts

Description: Returns the average number of current application events during the specified tim e period.

```
SELECT average(StoreViewCount), average(WebsiteCount)

FROM Cron

WHERE appName = '<your_app_name>' SINCE 2 minutes ago LIMIT 1
```

Cron - All Data from Event

Widget Name: Cron - All Data from Event

Description: Returns all application event data.

```
SELECT *

FROM Cron

WHERE appName = '<your_app_name>'
```

Customers

Active Customer Count

Widget Name: Active Customer Count

Description: Returns the number of active customers during the specified time period.

```
SELECT uniqueCount(CustomerId)

FROM Transaction
```

```
WHERE appName = '<your_app_name>' SINCE 15 minutes ago
```

Active Customers

Widget Name: Active Customers

Description: Returns the names of active customers during the specified time period.

```
SELECT uniques(CustomerName)
FROM Transaction
WHERE appName='<your_app_name>' SINCE 15 minutes ago
```

Top Customers

Widget Name: Top Customers

Description: Returns the top customers during the specified time period.

```
SELECT count(CustomerId)
FROM Transaction
WHERE appName = '<your_app_name>' FACET CustomerName SINCE 1 day ago
```

Recent Admin Activity

Widget Name: Recent Admin Activity

Description: Returns a defined number of records of recent activity, that include the customername and duration of visit.

```
SELECT CustomerName, duration, name
FROM Transaction
WHERE appName='<your_app_name>'
AND CustomerName IS NOT NULL
AND CustomerName != 'N/A' LIMIT 50
```

Orders

Number of Orders Placed

Widget Name: Number of Orders Placed

Description: Returns the number of orders placed during the specified time period.

```
SELECT count(`Order`)

FROM Transaction SINCE 1 day ago
```

Total Order Value

Widget Name:	Total Order Value
Description:	Returns the total number of line items ordered during the specified time period.

```
SELECT sum(LineItemCount)

FROM Transaction SINCE 1 day ago
```

Total Line Items Ordered

Widget Name:	Total Line Items Ordered
Description:	Returns the total number of line items ordered during the specified time period.

```
SELECT sum(LineItemCount)

FROM Transaction SINCE 1 day ago
```

OPERATIONS

Stores

In this section of the guide, you'll learn how to set up a store hierarchy, create attributes, and manage the settings used by each store to calculate taxes, and currency rates,

CHAPTER 91:

Stores Menu

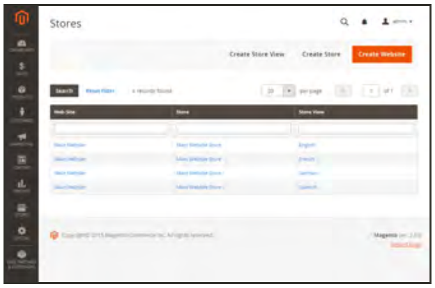
The Stores menu manages settings that are used less frequently, but referenced throughout your Magento installation, including setting up the store hierarchy, configuration, sales and order settings, tax and currency, product attributes, product review ratings, and customer groups.

Stores Menu

To display the Stores menu:

On the Admin sidebar, tap **Stores**.

Menu Options

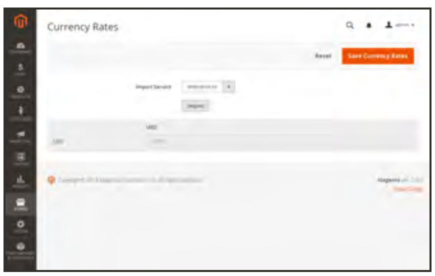


All Stores

Manage the hierarchy of websites, stores and store views in your Magento installation, and all configuration settings. In addition, you can set up the Terms and Conditions of a sale, and manage order status settings.

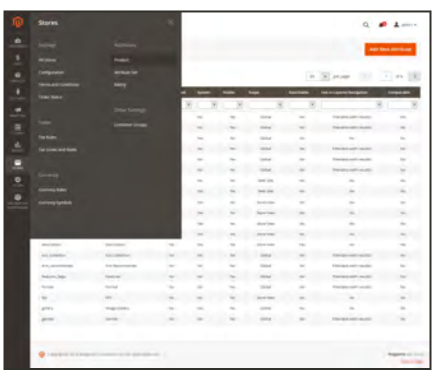
Taxes

Set up the tax rules for your store, define customer and product tax classes, and manage tax zones and rates. You can also import tax rate data into your store.



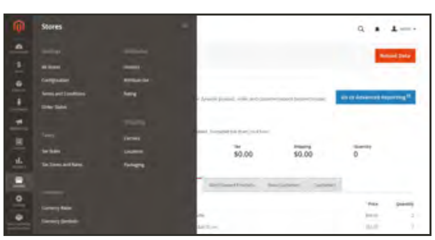
Currency

Manage the rates for the currencies that are accepted as payment in your store, and customize the currency symbols that appear in product prices and sales documents.



Attributes

Manage attributes that are used for customer and product information, returns, and product ratings. You can create new attributes, edit existing attributes, and manage attribute sets.



Shipping

Manage the Carrier, Location, and Packaging profiles for Magento Shipping.

Other Settings

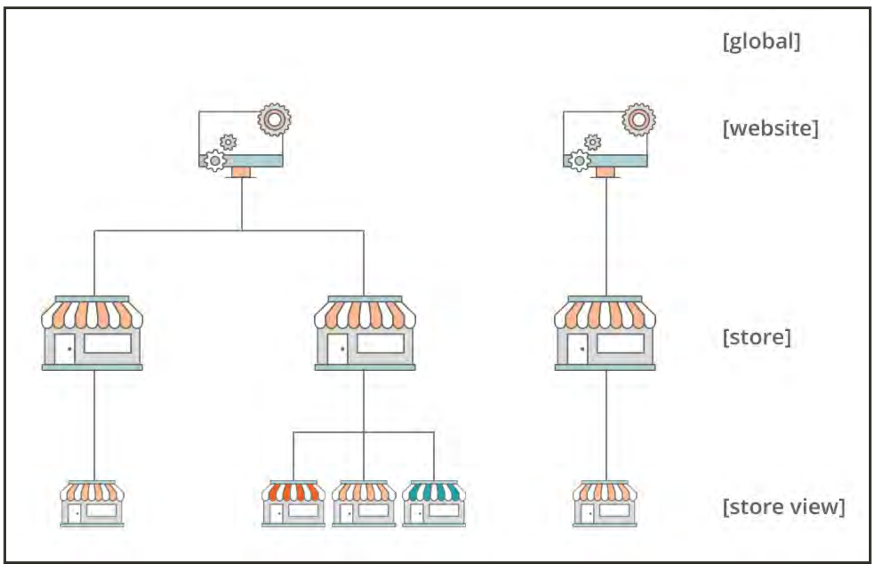
Manage the settings for reward exchange rates, gift wrapping, and gift registries.

CHAPTER 92:

All Stores

When Magento Commerce is installed, a hierarchy that includes a main website, store, and store view is created. You can create additional websites, stores, and store views, as needed. For example, in addition to your main website, you might have a additional websites with a different domain. Within each website, you can have multiple stores, and within each store, separate store views. Many installations have one website and one store, but with multiple store views to support different languages.

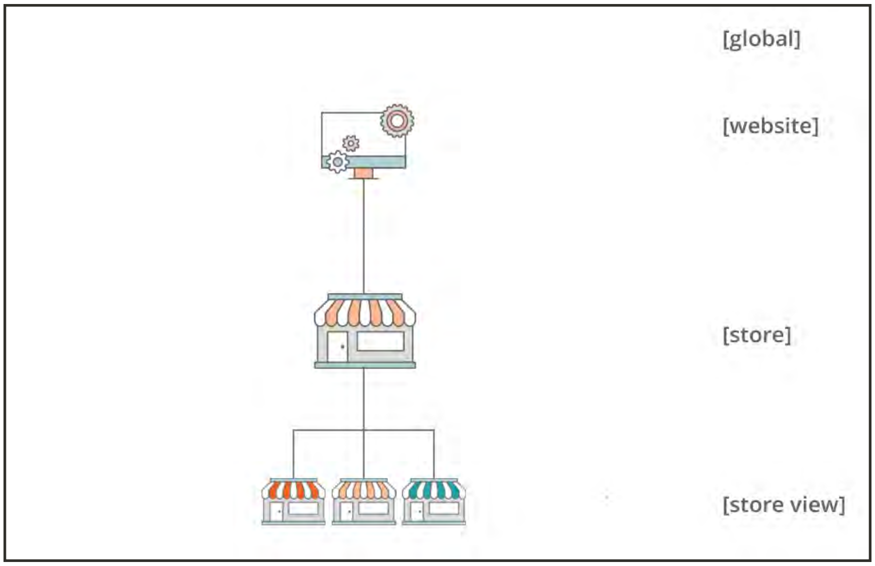
Before you begin, plan your store hierarchy in advance because it is referred to throughout the configuration. Each store can have a separate root category, which makes it possible to have an entirely different set of main menu options for each store.



Store Hierarchy

Adding Store Views

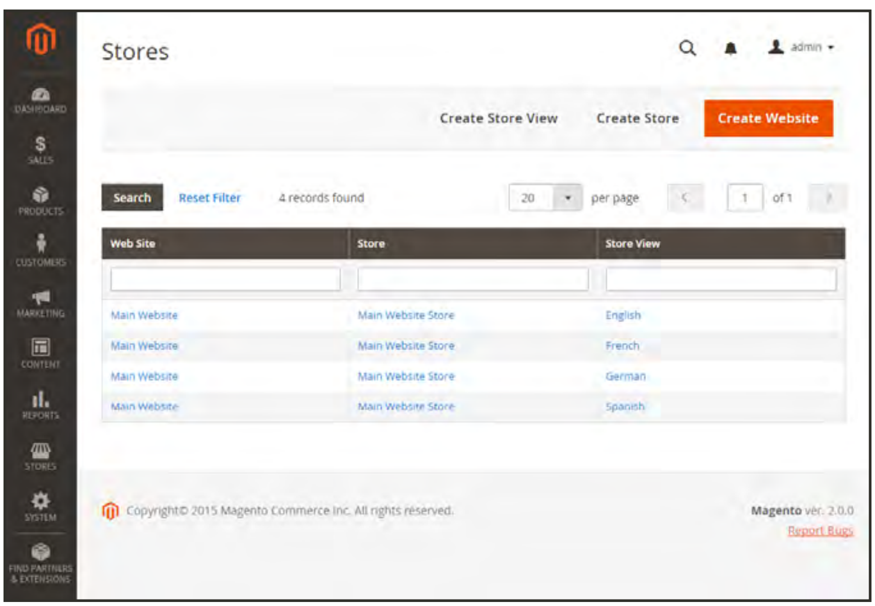
Store views are typically used to make the store available in different locales. Shoppers can use the language chooser in the header of the store to change the store view.



Multiple Store Views

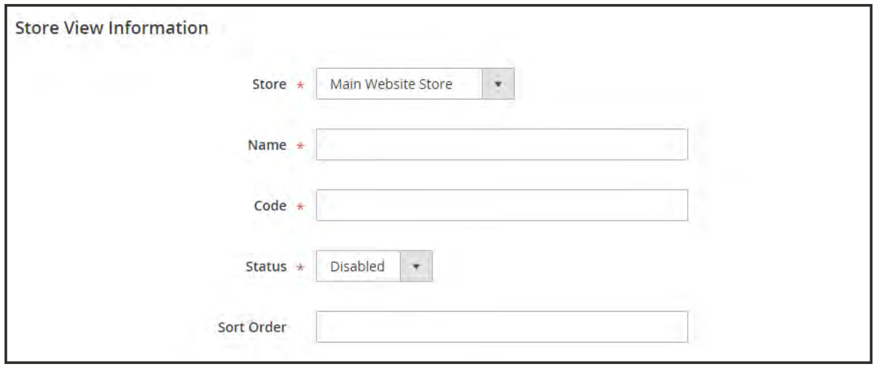
To create a new store view:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.



All Stores

2. Tap **Create Store View**. Then, do the following:



Store View Information

a. Set **Store** to the parent store of this view.

b. Enter a **Name** for this store view. The name appears in the language chooser in the store header. For example: Spanish.

c. Enter a **Code** in lowercase characters to identify the view. For example: spanish.

d. To activate the view, set **Status** to “Enabled.”

e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.

3. When complete, tap **Save Store View**.

Editing a Store View

Because the view name appears in the language chooser, you might eventually want to change the name of the default view to something more descriptive. The Name field is simply a label, and can be easily changed.

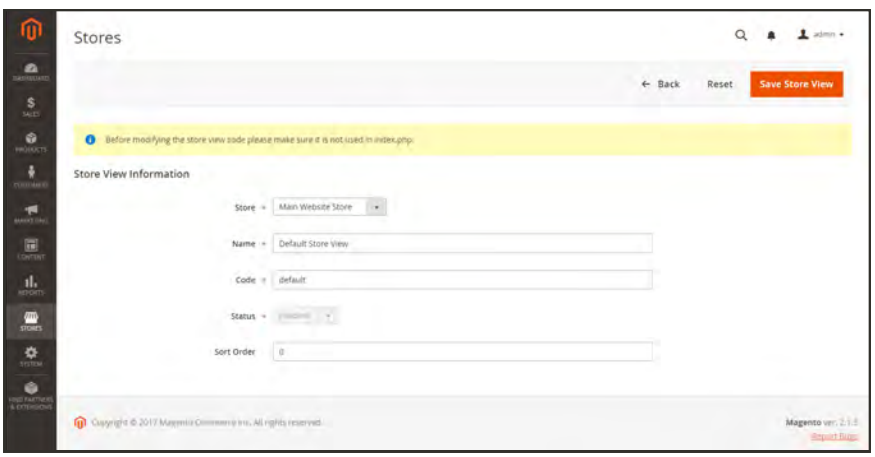
If your Magento installation has a multisite or multistore setup, do not change the store Code field without verifying that the value is not referenced in the `index.php` file. If you do not have access to the server to examine the file, ask a developer for help.

FIELD	ORIGINAL VALUE	UPDATED VALUE
Name	Default Store View	English
Code	default	english

To edit a store view:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. In the **Store View** column of the grid, click the name of the view that you want to edit.

When editing the default view, the Store and Status fields are not available.

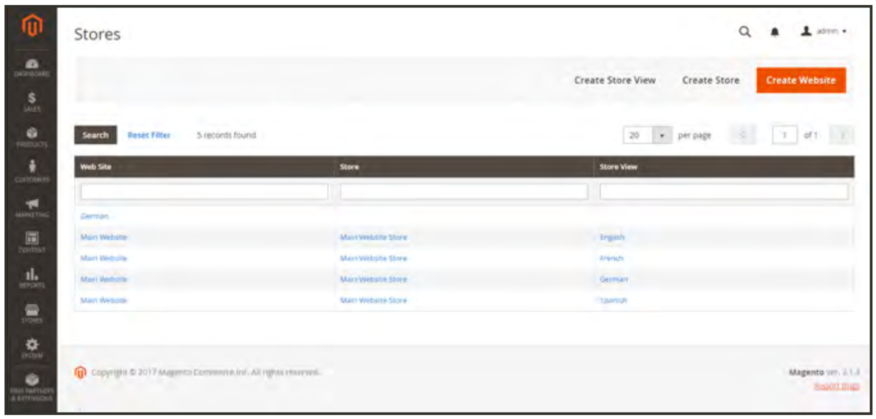


Editing the Default View

3. Update the following fields as applicable:

   - Store (non-default views only)
   - Name
   - Code (only if not used in `index.php`)
   - Status (non-default views only)
   - Sort Order

4. When complete, tap **Save Store View**.



Stores

Adding a Language

Most of the text that appears to be hard-coded on pages throughout your store can be instantly changed to a different language by changing the locale of the view. Changing the locale doesn't actually translate the text word-for-word, but simply references a different translation table that provides the interface text that is used throughout the store. The text that can be changed includes navigational titles, labels, buttons, and links such as "My Cart" and "My Account." You can also use the Inline Translation tool to touch up text in the interface.

Language packs can be found under "Translations & Localization" on Magento Marketplace. New extensions are continually added to Marketplace, so check back often!

Step 1: Install a Language Pack

Follow the standard instructions to install the language pack extension from Component Manager.

Step 2: Create a Store View for the Language

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store View**. Then, do the following:
   a. Choose the **Store** that is the parent of the view.
   b. Enter a **Name** for the store view. For example: Portuguese.

      In the header of the store, the name appears in the "language chooser."
   c. Enter a **Code** in lowercase characters to identify the view. For example: portuguese.
   d. To activate the view, set **Status** to "Enabled."
   e. (Optional) Enter a **Sort Order** number to determine the sequence in which this view is listed with other views.
3. When complete, tap **Save Store View**.

Step 3: Change the Locale of the Store View

1. On the Admin sidebar, tap **Stores**. Then under **Settings,** choose **Configuration**.
2. In the upper-left corner, set **Store View** to the specific view where the configuration is to apply. When prompted to confirm scope switching, tap OK.
3. Expand the **Locale Options** section.
4. Clear the **Use Website** checkbox after the Locale field. Then, set **Locale** to the language that you want to assign to the view.

   If there are several variations of the language available, make sure to choose the one for the specific region or dialect.
5. When complete, tap **Save Config**.

   After you change the language of the locale, the remaining content that you have created, including product names and descriptions, categories, CMS pages, and blocks must be translated separately for each store view.

Translating Products

If your store has multiple views in different languages, the same products are available in each store view. You can use the same basic product information, such as SKU, price, and inventory level, regardless of language. Then, translate only the product name, description fields, and meta data as needed for each language.

Process Overview:

Step 1: Translate Product Fields

Step 2: Translate Field Labels

Step 3: Translate All Categories

Step 1: Translate Product Fields

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Catalog**.
2. In the grid, find the product to be translated, and open in edit mode.
3. In the upper-left corner set **Store View** to the view for the translation. When prompted to confirm, tap **OK**.
4. For each field to be edited, do the following:
   a. Clear the **Use Default Value** checkbox to the right of the field.
   b. Either paste or type the translated text into the field.

   Make sure to translate all text fields, including image labels and Alt text, Search Engine Optimization fields and any Custom Options information.
5. When complete, tap **Save**.

Step 2: Translate Field Labels

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
2. In the list, find the attribute to be translated, and open in edit mode.
3. In the panel on the left, choose **Manage Labels**.
4. In the **Manage Titles** section, enter a translated label for each store view.

Enter Translated Labels

5. When complete, tap **Save Attribute**.

Step 3: Translate All Categories

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. In the upper-left corner set **Store View** to the view for the translation. When prompted to confirm, tap **OK**.
3. In the tree, find the category to be translated and open in edit mode.
4. On the **General Information** tab, translate the following fields:
   - Name
   - Description
   - Page Title
   - Meta Keywords
   - Meta Description
5. To translate the **URL Key**, do the following:
   a. Clear the **Use Default Value** checkbox to the right of the field.
   b. Enter the translated text.
   c. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected

Translate URL Key

6. When complete, tap **Save Category**.
7. Repeat the process for all categories used in the store.

Translating Content

If your store has multiple views in different languages, and you have set the locale for each view to a different language, the result is a partially translated site. The next step is to create a translated version of each page that is available from the specific store view. The Store View column of the Manage Pages list shows each view that has a translated version of the page.

To translate a content page, you must create a new page that has the same URL Key as the original, but is assigned to the specific store view. Then, update the page for the specific view with the translated text. The following example shows how to create a translated version of the "About Us" page for the Spanish store view.

To create a translated page for a view:

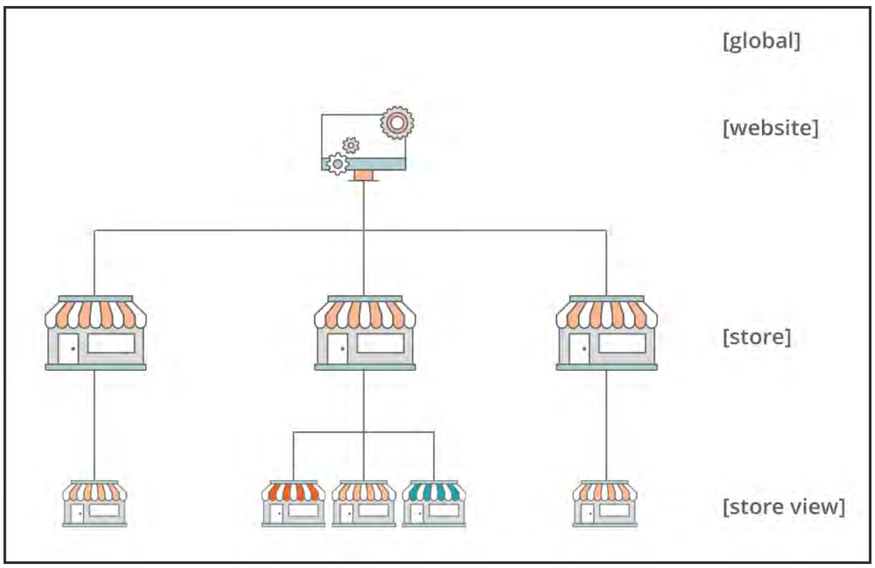
1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. In the grid, find the page to be translated, and open in edit mode.
3. Copy the **URL Key** to the clipboard. Then, press the **Back** button to return to the Pages grid.
4. Tap **Add New Page**. Then, do the following:
   a. Enter the translated **Page Title**.
   b. Paste the **URL Key** that you copied from the original page.
   c. In the **Store View** box, choose the store view where the page is to be available.
   d. In the panel on the left, choose **Content**. Then, complete the translated text for the page.
   e. On the **Design** tab, set the column **Layout** of the page.
   f. On the **Meta Data** tab, enter the translated text for the **Keywords** and **Description**.
5. When complete, tap **Save Page**. Then when prompted, refresh any invalid caches.
6. To verify the translation, go to the storefront and use the language chooser to change the store view.

   Notice that there are still some elements on the page that need to be translated, including the company footer links block, the welcome message, and product information.

Adding Stores

A single installation of Magento can have multiple stores that share the same Admin. Stores that are under the same website have the same IP address and domain, use the same security certificate, and share a single checkout process.

The important thing to understand is that the stores use the same Magento code, and share the same Admin. Each store can have a separate catalog, or share the same catalog. Each store can have a separate root category, which makes it possible to have a different main menu for each store. Stores can have different branding, presentation, and content. Before you begin, take some time to plan your store hierarchy with future growth in mind, because it is used throughout the configuration.



Multiple Stores

Here are some examples of how URLs can be configured for multiple stores:

`yourdomain.com/store1` `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.

Process Overview:

Step 1: Choose the Store Domain

Step 2: Create the New Store

Step 3: Create a Default Store View

Step 4: Configure the Store URL

Step 1: Choose the Store Domain

The first step is to choose how you want to position the store. Will the stores share the same domain, each have a subdomain, or have distinctly different domains? For each store, do one of the following:

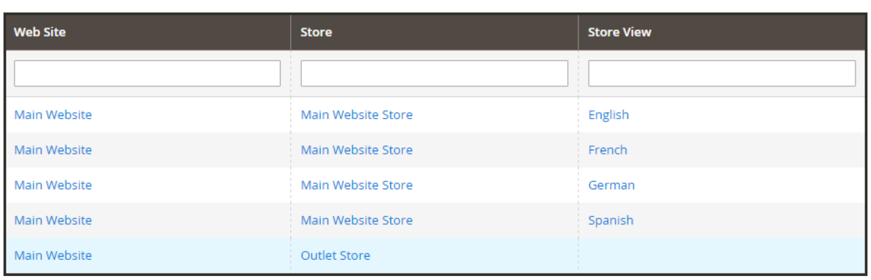
- To place the store one level below the primary domain, you don't have to do anything.
- Set up a subdomain of your primary domain.
- Set up a different primary domain.

Step 2: Create the New Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store**. Then, do the following:
   a. Choose the **Web Site** that is to be the parent of the new store. If the installation has only one web site, accept the default, "Main Website."
   b. Enter a **Name** for the new store. The name is for internal reference only.
   c. Enter a **Code** in lowercase characters to identify the store. For example: mainstore.
   d. Set **Root Category** to the root category that defines the category structure for the main menu of the new store. If you have already created a specific root category for the store, select it. Otherwise, select "Default Category." You can come back later and update the setting.

Store Information

3. When complete, tap **Save Store**.

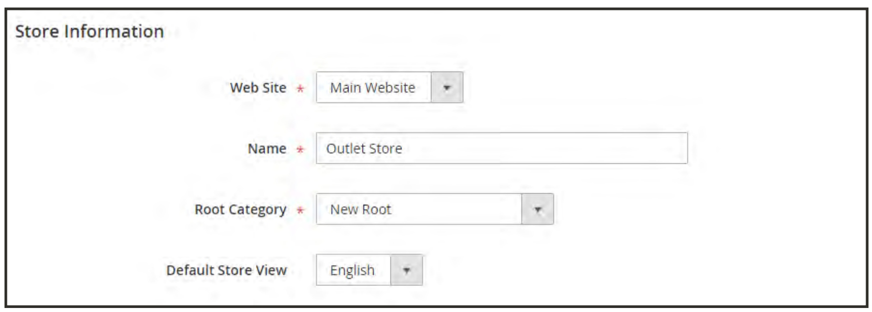


New Store

Step 3: Create a Default Store View

1. Tap **Create Store View**. Then, do the following:
   a. Set **Store** to the new store you created.
   b. Enter a **Name** for the view. For example, "English."
   c. Enter a **Code** for the view in lowercase characters.
   d. Set **Status** to "Enabled."
   e. In the **Sort Order** field, enter a number to determine the store's position when listed with other stores.
2. Tap **Save Store View**.

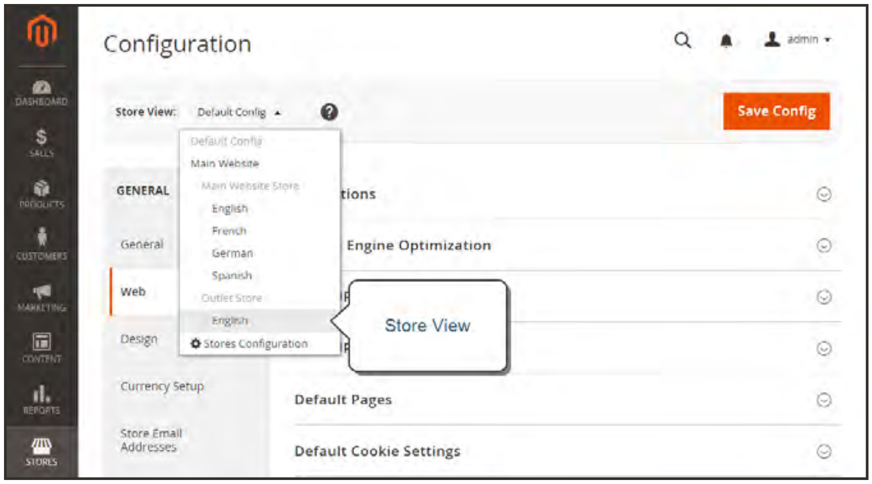
   If you were to open your store in edit mode, you would see that it now has a default view.



New Store with Default View

Step 4: Configure the Store URL

1. On the menu bar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** to the view that you created for the new store. When prompted to confirm scope switching, tap **OK**.

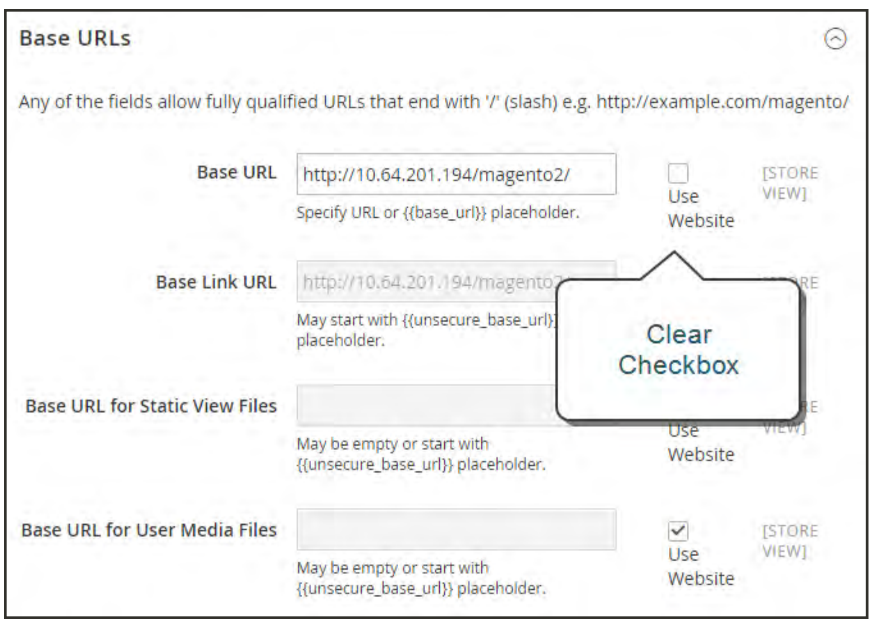


Choose the New Store View

4. Expand the **Base URLs** section. Then, do the following:

   a. After the Base URL field, clear the **Use Website** checkbox.

   b. Enter the **Base URL** for the store.



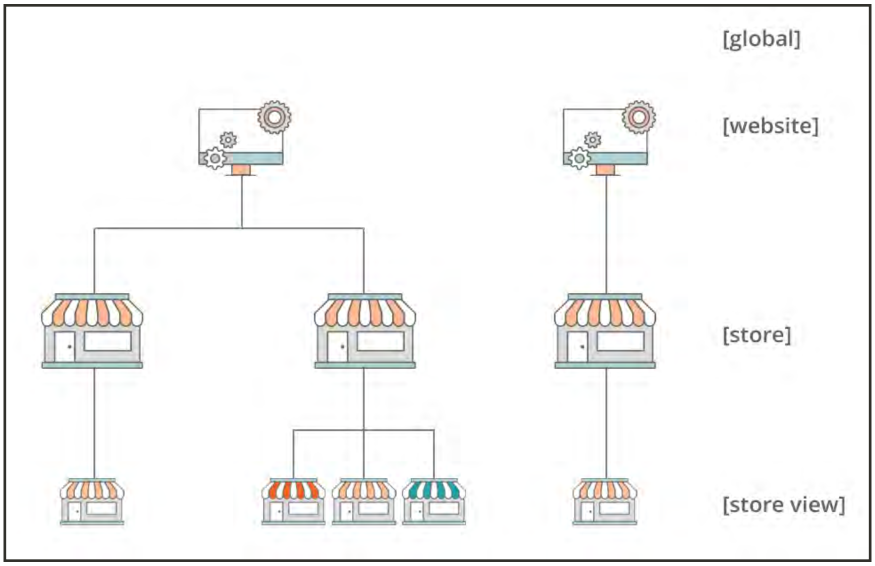
Base URLs

5. Expand the **Secure Base URLs** section, and repeat the previous step as needed to configure the store's secure URL.

6. When complete, tap **Save Config**.

Adding Websites

Multiple websites can be set up that use the same Magento installation. The websites can be set up to use the same domain, or different domains. If you want each store to have a dedicated checkout process under its own domain, each store must have a distinct IP address and separate security certificate.



Multiple Websites

Step 1: Create a New Website

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **All Stores**.
2. Tap **Create Website**. Then, do the following:

Website Information

a. In the **Name** field, enter the domain of the new website. For example, “domain.com.”

b. Enter a **Code** that will be used on the server to point to the domain.

   The code must begin with a lowercase (a-z) letter, and can include any combination of letters (a-z), numbers (0-9), and the underscore (_) symbol.

c. (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.

d. Set **Default Store** to the store that is to be used as the default for this website.

3. When complete, tap **Save Website**.

4. Set up each store and store view that is needed for the new website.

Step 2: Configure the Store URL

Follow the instructions to configure the store URLs.

Store URLs

Each website in a Magento installation has a base URL that is assigned to the storefront, and another URL that is assigned to the Admin. Magento uses variables to define internal links in relation to the base URL, which makes it possible to move an entire store from one location to another without updating the links. Standard base URLs begin with `http`, and secure base URLs begin with `https`.

Base URL	`http://www.yourdomain.com/magento/`
Secure Base URL	`https://www.yourdomain.com/magento/`
URL with IP address	`http://###.###.###.###/magento/` `https://###.###.###.###/magento/`

Important! Do not change the Admin URL from the default Base URL configuration. To change the Admin URL or path, see: Using a Custom Admin URL.

Use Secure Protocol

The base URLs for your store were initially set up during the Web Configuration step of the Magento installation. If a security certificate was available at the time, you could specify for secure (`https`) URLs to be used for the store, Admin, or both. If your Magento installation includes multiple stores, or if you plan to later add more stores, you can include the store code in the URL. All Magento resources and operations can be used with secure protocol.

If a security certificate wasn't available for the domain at the time of the installation, make sure to update the configuration before launching your store. After a security certificate is established for your domain, you can configure either or both base URLs to operate with encrypted Secure Sockets Layer (SSL) and Transport Layer Security (TLS) protocol.

Magento strongly recommends for all pages of a production site, including content and product pages, to be transmitted with secure protocol.

Magento can be configured to deliver all pages over `https` by default. If your store has been running up until now with standard protocol, you can improve security by enabling HTTP Strict Transport Security (HSTS). and by upgrading any insecure page requests that are received by the store. HSTS is an opt-in protocol that prevents browsers from rendering standard `http` pages that are transmitted with unsecure protocol for the specificed domain. Because search engines might have already indexed each page of your store with standard `http` URLs, you can configure Magento to automatically upgrade any unsecure page requests to `https`, so you don't lose any traffic. When Magento is configured to use secure URLs for both the store and Admin, two additional fields appear that allow you to enable HSTS.

To configure the base URL:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left, under **General**, choose **Web**.

3. Expand the **Base URL** section, and do the following:

   a. Enter the fully qualified **Base URL** for your store. Make sure to end the URL with a forward slash, so it can be extended with additional URL Keys from your store. For example:

   ```
   http://yourdomain.com/
   ```

   > Do not change the placeholder in the **Base Link URL** field. It is a placeholder that is used to create relative links to the base URL.

   b. (Optional) To specify an alternate location for the **Base URL for Static View Files**, enter the path starting with the following placeholder:

   ```
   {{unsecure_base_url}}
   ```

   c. (Optional) To specify an alternate location for the **Base URL for User Media Files**, enter the path starting with the following placeholder:

   ```
   {{unsecure_base_url}}
   ```

   For a typical installation, there is no need to update the paths for the static view files or media files because they are relative to the base URL.

Base URLs

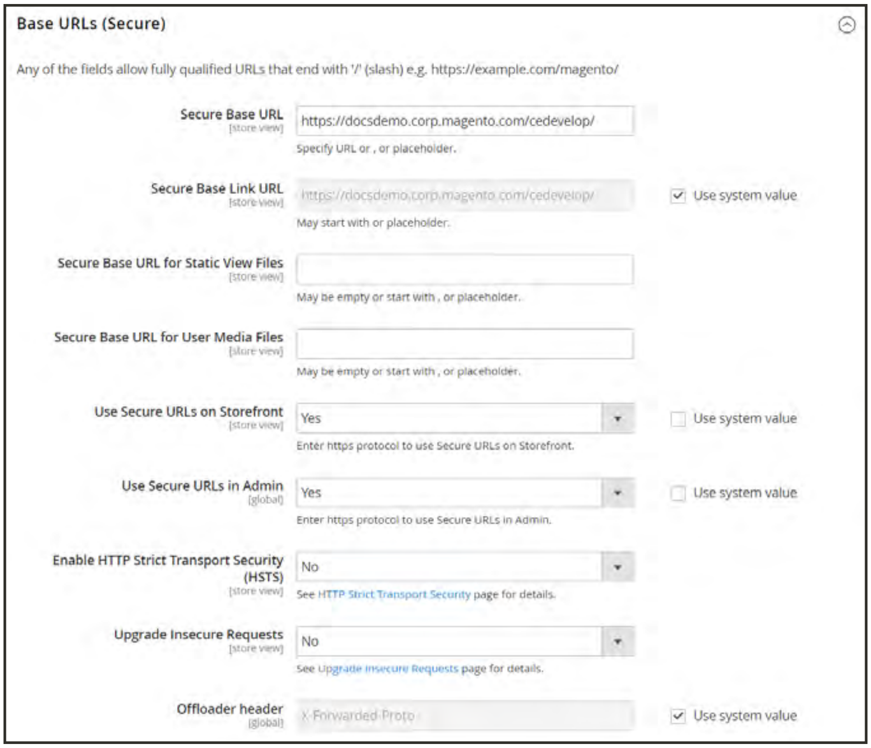
> Placeholders enclosed in double braces are markup tags for variables.

4. When complete, tap **Save Config**.

To configure the secure base URL:

If your domain has a valid security certificate, you can configure the URLs of both the storefront and Admin to transmit data over a secure (https) channel. Without a valid security certificate, your store cannot operate with secure (SSL/TLS) protocol.

1. Expand the **Base URLs (Secure)** section. Then, do the following:



Base URLs (Secure)

a. Enter the full **Secure Base URL**, followed by a forward slash. For example:

```
https://yourdomain.com/
```

b. Do not change the placeholder in the **Secure Base Link URL** field. It is used to create relative links to the secure base URL.

c. (Optional) To specify an alternate location for the **Secure Base URL for Static View Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

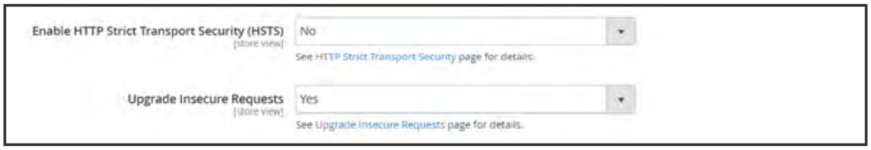
d. (Optional) To specify an alternate location for the **Secure Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

2. To enhance security, set both of the following options to "Yes."

   - Use Secure URLs on Storefront
   - Use Secure URLs in Admin

   When the following additional fields appear , do the following:



Enhanced Security Settings

   a. If you want your store to display only secure `https` page requests, set **Enable HTTP Strict Transport Security (HSTS)** to "Yes."

   b. To upgrade any requests for standard unsecured `http` pages to secure `https`, set **Upgrade Insecure Requests** to "Yes."

3. When complete, tap **Save Config**.

To include the store code in URLs:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand the **URL Options** section.
4. Set **Add Store Code** to your preference.

URL with Store Code

```
http://www.yourdomain.com/magento/[store-code]/index.php/url-identifier
```

URL without Store Code

```
http://www.yourdomain.com/magento/index.php/url-identifier
```

URL Options

5. When complete, tap **Save Config**.
6. After the setting is saved, you will be prompted to refresh the cache. Tap the **Cache Management** link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.

Refresh Cache

Troubleshooting

If after following the configuration instructions, some pages continue to be served with the unsecure URL (http://), do the following:

- Change the (unsecure) base URL to the secure (https://) URL.
- On the server, edit the .htaccess file (or load balancer) so the unsecure URL is redirected to the secure URL.

Using a Custom Admin URL

As a security best practice, Magento recommends that you use a unique, custom Admin URL instead of the default “admin” or a common term such as “backend”. Although it will not directly protect your site from a determined bad actor, it can reduce exposure to scripts that try to gain unauthorized access.

> Check with your hosting provider before implementing a custom Admin URL. Some hosting providers require a standard URL to meet firewall protection rules.

In a typical Magento installation, the Admin URL and path is immediately below the Magento base URL. The path to the store Admin is one directory below the root.

Default Base URL

```
http://yourdomain.com/magento/
```

Default Admin URL and Path

```
http://yourdomain.com/magento/admin
```

Although it is possible to change the Admin URL and path to another location, any mistake removes access to the Admin, and must be corrected from the server.

> As a precaution, do not try to change the Admin URL by yourself unless you know how to edit configuration files on the server.

Method 1: Change from the Magento Admin

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. Expand the **Admin Base URL** section. Then, do the following:
   a. Clear the first **Use system value** checkbox. Then, set **Use Custom Admin URL** to “Yes”.
   b. Clear the next **Use system valuel** checkbox. Then, enter the **Custom Admin URL** in the following format:

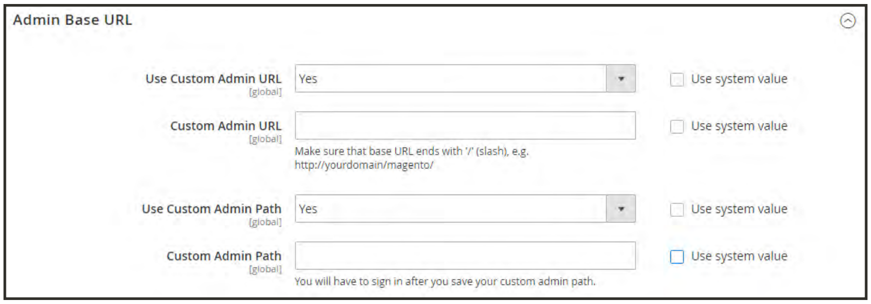
      ```
      http://yourdomain.com/magento/
      ```

      > **Important!** The Admin URL must be in the same Magento installation, and have the same document root as the storefront.

   c. Clear the next **Use system valuel** checkbox. Then, set **Custom Admin Path** to “Yes”.
   d. Clear the next **Use system valuel** checkbox. Then, enter the **Custom Admin Path.**

The path that you enter is appended to the Custom Admin URL after the last forward slash.

```
sample_custom_admin
```



Admin Base URL

4. When complete, tap **Save Config**.

5. After the changes are saved, **Sign Out** of the Admin. Then, log back in using the new Admin URL and path.

Method 2: Change from the Server Command Line

1. Open the `app/etc/env.php` file in a text editor, and change the name of the `[admin]` path. Make sure to use only lowercase characters. Then, save the file.

   On the server, the admin path is located in the `app/etc/env.php` file. Look for the `<adminhtml>` argument in the `<admin>` section:

   Default Admin Path

   ```
   # <frontName><![CDATA[admin]]></frontName>
   ```

   New Admin Path

   ```
   # <frontName><![CDATA[backend]]></frontName>
   ```

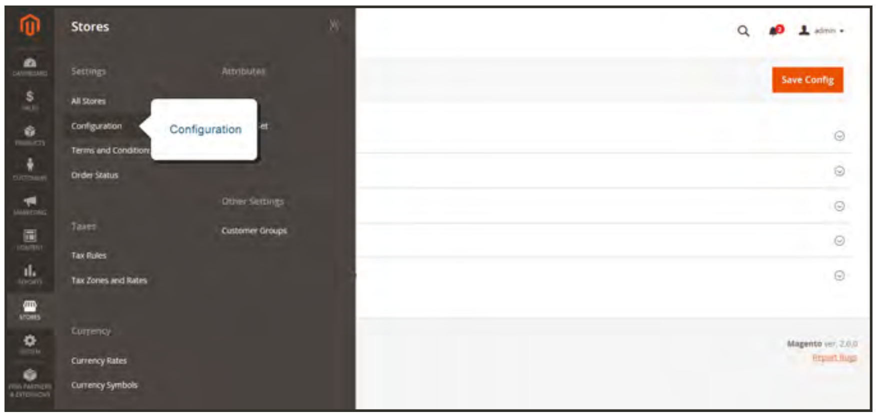
2. Use one of the following methods to clear the Magento cache:

   - On the Admin sidebar, tap **System**. Under **Tools**, choose **Cache Management**. Then, tap **Flush Magento Cache**.
   - On the server, navigate to the `var/cache` folder, and delete the contents of the `cache` folder.

CHAPTER 93:

Configuration

The online Configuration Reference has field descriptions for every configuration setting in Magento Commerce. To learn how to apply configuration settings to specific store views, see: Scope.

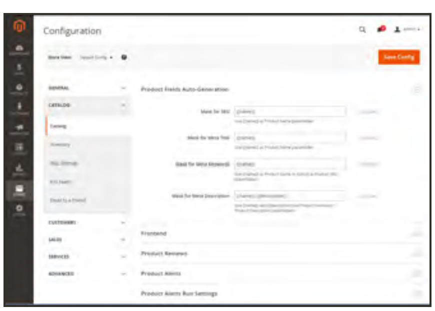


Configuration

Configuration Tabs

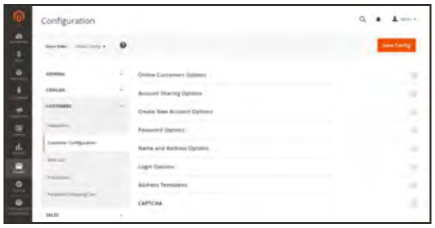
General

Includes basic configuration settings for the store, URLs, theme, currency, email addresses, store contacts, editor, and dashboard reports.



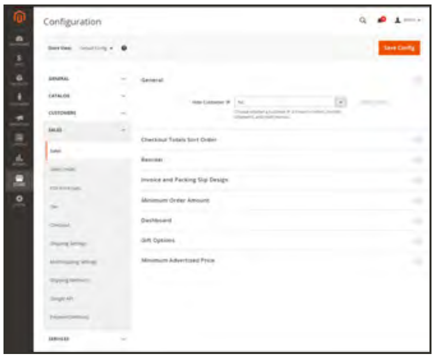
Catalog

Determines product and inventory settings, controls sitemap and RSS feed generation, and specifies the email template that is used to share products with friends.



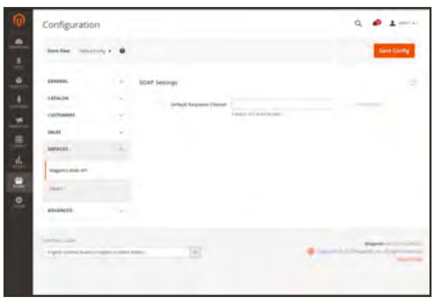
Customers

Establishes basic customer account and login options, newsletter settings, ,wish list, and the format of auto-generated coupon codes.



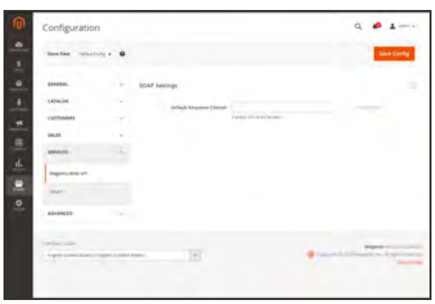
Sales

Determines checkout and tax settings, payment and shipping options, sales email and PDF print-outs, and Google API settings.



Services

Configures Magento API settings, including SOAP and OAuth.



Advanced

Determines default Admin settings, various system configuration settings, advanced module controls, and developer tools (if the store is running in developer mode).

CHAPTER 94:

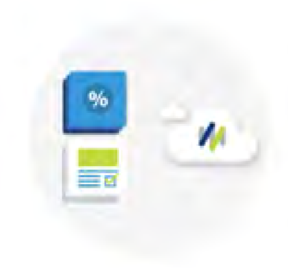
Taxes

In this section of the guide, you will learn how to set up taxes according to the requirements of your locale. You can set up tax classes for products and customer groups, and create tax rules that combine product and customer classes, tax zones, and rates. In addition, you'll learn more advanced topics such as setting up fixed product taxes, compound taxes, and how to display consistent prices across international borders. If you are required to collect a value-added tax, you will learn how to set up your store to automatically calculate the appropriate amount with validation.

Magento provides a variety of options to define taxes. Tax classes are used to define “tax rules.” Tax rules are a combination of a Product Class, a Customer Class and a Tax Zone and Rate. Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union.

Vertex Cloud

Vertex is a cloud-based solution that automates your sales and use tax compliance, and generates a signature-ready PDF for your monthly returns.



Automate Tax Calculations & Returns

Vertex saves time, reduces risk, and helps you file your tax returns on time.

Sales & Use Tax

Vertex Cloud calculates sales tax in the shopping cart based on the tax profile of each product that is purchased, and the jurisdiction.

Manage Exception Certificates

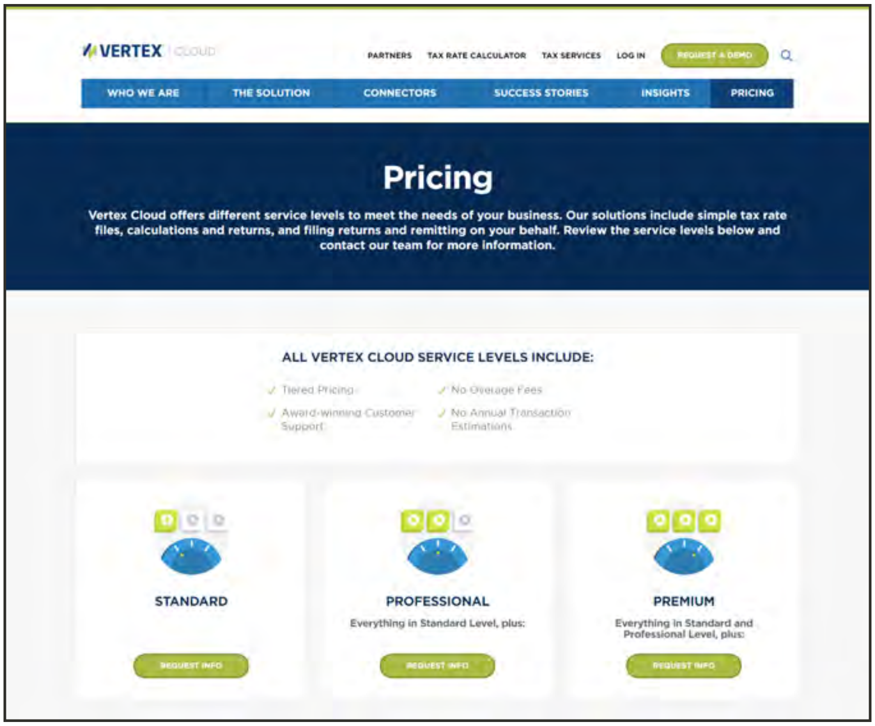
Vertex makes it easy to manage customers by jurisdiction who have non-standard tax requirements.

Generate Returns

Vertex Cloud automatically regenerates signature-ready PDF returns and sends a message when the returns are available.

Your Vertex Account

Vertex offers three pricing plans, plus access to additional services. All Vertex accounts include tiered pricing and award-winning customer support, but without extra fees for fees or annual transaction estimations. Don't hesitate to contact Vertex if you need help choosing the right pricing plan for your business. Then, sign up for an account on Vertex Cloud.



Pricing

To sign up for a Vertex account:

1. Visit the Vertex web site to learn more about their services and pricing. Then in the menu at the top of the page, choose **Pricing**.

2. Choose the pricing plan you want, and tap **Request Info**.

   > Vertex Cloud is available to companies located in the U.S. or Canada.

3. You will receive an email with a link to register your Vertex Cloud account. Click the link, and complete the registration as follows:

   a. Enter your **Username**, **Password**, and **Password Confirmation**.

      Your username and password are case sensitive. Make sure to write them down for future reference.

   b. Complete the fields in the **Company Information** section.

   c. Complete the fields in the **Contact Information** section.

   d. To continue, mark the **I agree to the terms of service** checkbox.

4. Under **Subscription Information**, choose one of the following **Subscription Levels**, according to your pricing plan.

   - Standard
   - Professional
   - Premium

   Then, mark the checkbox of any optional features and services that you want to add to your account.

5. Under **Billing Information**, do the following:

   a. Complete your **Billing Address**.

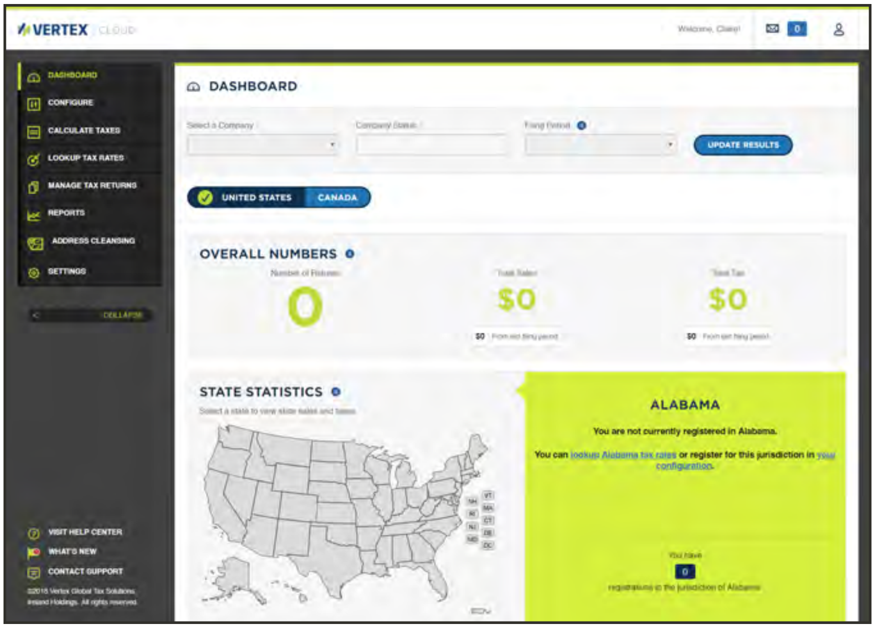
      > Your company's billing address is required if paying by credit card, and must be located in either the U.S. or Canada.

   b. Choose the **Payment Method** that you want to use. Then, complete the required information.

6. To complete the process, tap **Submit Billing Information & Finish**.

   > Some of our instructions include links for more information in the Vertex Cloud Help Center. You must be logged in to your account to gain access to the Vertex Cloud Help Center.

See the instructions in the online user guide to complete both the Vertex Cloud and Magento configuration.



Vertex Cloud Dashboard

General Tax Settings

The following instructions take you through the basic tax configuration for your Magento installation. Before setting up your taxes, make sure that you are familiar with the tax requirements of your locale. Then, complete the tax configuration according to your requirements.

Admin permissions can be set to restrict access to tax resources, based on the business “need to know.” To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.

To configure the general tax settings:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.

2. For a multisite configuration, set **Store View** to the website and store that is the target of the configuration.

3. Complete the following configuration settings. If necessary, clear the **Use System value** checkbox of any settings that are grayed out.

Tax Classes

1. In the panel on the left under **Sales**, choose **Tax**.

2. Expand the **Vertex Tax Classes** section. Then, do the following:

Tax Classes

a. Set **Tax Class for Shipping** to the appropriate class. The default classes are:
   - None
   - Taxable Goods

b. Set **Tax Class for Gift Options** to the appropriate class. The default classes are:
   - None
   - Taxable Goods

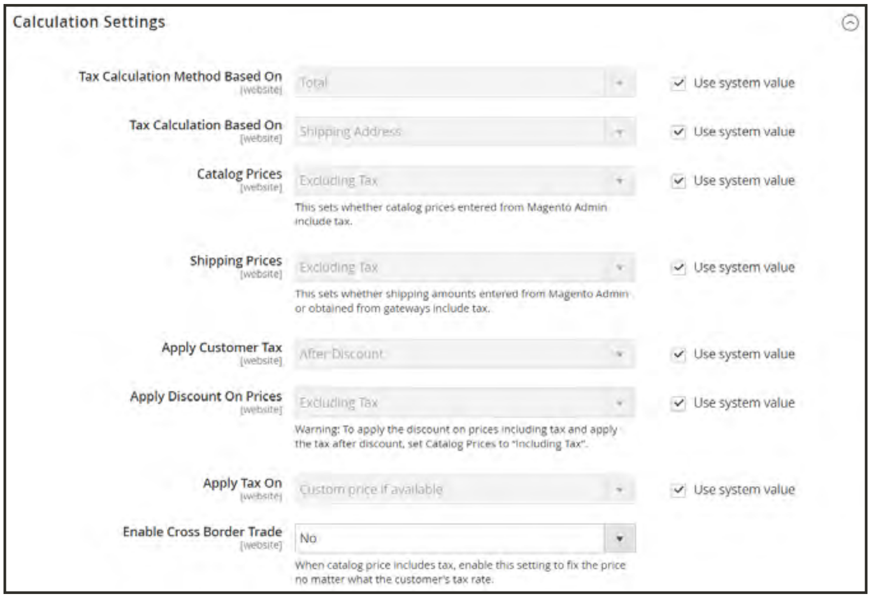
c. Set **Default Tax Class for Product** to the appropriate class. The default classes are:
   - None
   - Taxable Goods

d. Set **Default Tax Class for Customer** to the appropriate class. The default class is:
   - Retail Customer
   - Wholesale Customer

3. When complete, tap **Save Config**.

Calculation Settings

1. Expand the **Calculation Settings** section. Then, do the following:



Calculation Settings

a. Set **Tax Calculation Method Based On** to one of the following:

Unit Price	The price of each product.
Row Total	The total of the line item in the order, less discounts.
Total	The order total

b. Set **Tax Calculation Based On** to one of the following:

Shipping Address	The address where the order is to be shipped.
Billing Address	The billing address of the customer.
Shipping Origin	The address that is specified as the point of origin for your store.

c. Set **Catalog Prices** to one of the following:

- Excluding Tax
- Including Tax

d. Set **Shipping Prices** to one of the following:

- Excluding Tax
- Including Tax

e. Set **Apply Customer Tax** to one of the following to determine whether tax is applied to the original or discounted price.

- After Discount
- Before Discount

f. Set **Apply Discount on Prices** to one of the following to determine if discounts include or exclude tax.

- Excluding Tax
- Including Tax

g. Set **Apply Tax On** to one of the following:

- Custom price if available
- Original price only

h. Set **Enable Cross-Border Trade** to one of the following:

Yes	Use consistent pricing across different tax rates. If the catalog price includes tax, choose this setting to fix the price regarless of the customer's tax rate.
No	Vary the price by tax rate.

> **Important!** If cross-border trade is enabled, the profit margin changes by tax rate. Profit is determined by the formula (Revenue - CustomerVAT - CostOfGoodsSold). To enable cross-border trade, prices must be set to include tax.

2. Expand the **Default Tax Destination Calculation** section. Then, specify the country that is to be the default for tax calculations.

Default Tax Destination Calculation

3. When complete, tap **Save Config**.

Price Display Settings

> **Important!** Some combinations of settings related to a price display that both includes and excludes tax can be confusing to the customer. To avoid triggering a warning message, see the recommended settings.

1. Expand the **Price Display Settings** section Then, do the following:

Price Display Settings

a. Set **Display Product Prices in Catalog** to one of the following:

Excluding Tax	Catalog prices that appear in the storefront do not include tax.
Including Tax	Catalog prices in the storefront include tax only if a tax rule matches the tax origin, or if the customer's address matches the tax rule. This might happen after a customer creates an account, logs in, or uses the Estimate Tax and Shipping tool in the cart.
Including and Excluding Tax	Catalog prices that appear in the storefront are displayed both with, and without tax.

b. Set **Display Shipping Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

2. Expand the **Shopping Cart Display Settings** section.

For each of the following settings, choose how you want taxes and prices to appear in the cart, according to the requirements of your store and locale.

a. Set **Display Prices** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

b. Set **Display Subtotal** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

c. Set **Display Shipping Amount** to one of the following:

- Excluding Tax
- Including Tax
- Including and Excluding Tax

d. Set the following to either "Yes" or "No," according to your needs:

- Include Tax in Order Total
- Display Full Tax Summary
- Display Zero Tax Subtotal

Shopping Cart Display Settings

3. Expand the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following to specify how prices and taxes appear in orders, invoices, and credit memos.

   a. Set **Display Prices** to one of the following.

   - Excluding Tax
   - Including Tax
   - Including and Excluding Tax

   b. Set **Display Subtotal** to one of the following:

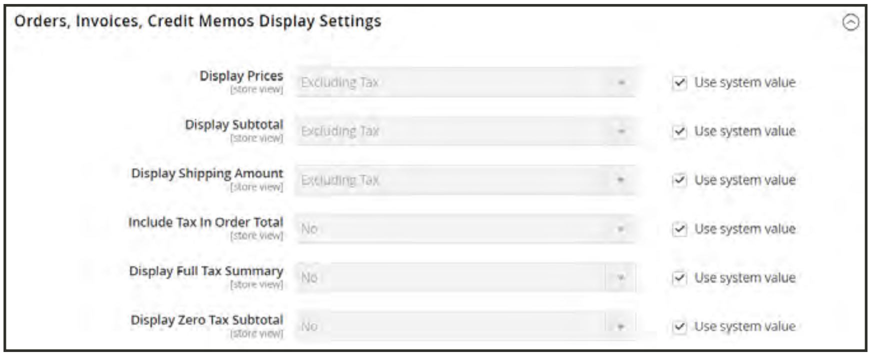
   - Excluding Tax
   - Including Tax
   - Including and Excluding Tax

   c. Set **Display Shipping Amount** to one of the following:

   - Excluding Tax
   - Including Tax
   - Including and Excluding Tax

   d. Set the following to "Yes" or "No," according to your requirements:

   - Include Tax in Order Total
   - Display Full Tax Summary
   - Display Zero Tax Subtotal



Orders, Invoices, Credit Memos Display Settings

4. When complete, tap **Save Config**.

Cross-Border Price Consistency

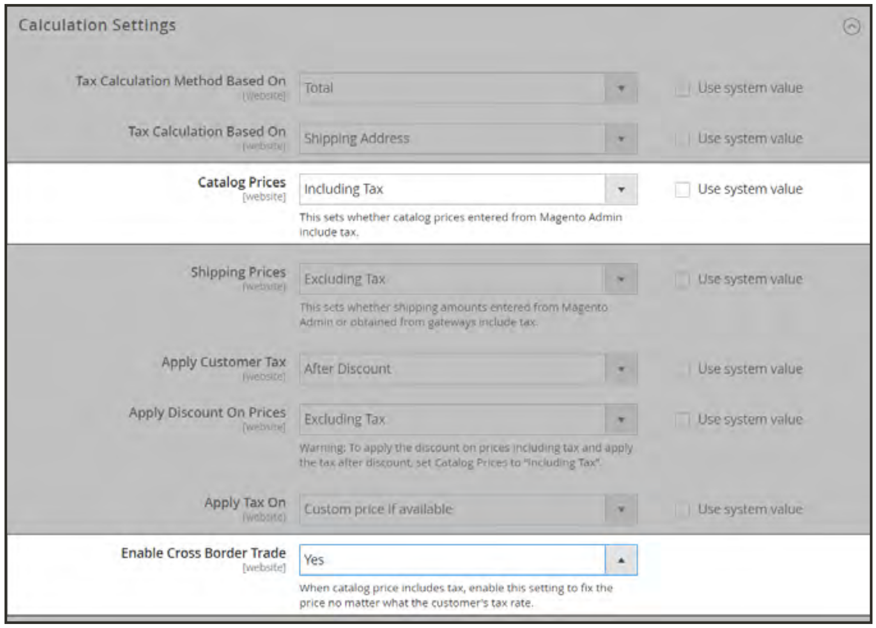
Cross-border trade (also referred to as price consistency) supports European Union (EU) and other merchants who want to maintain consistent prices for customers whose tax rates are different than the store tax rate.

Merchants operating across regions and geographies can show their customers a single price by including the tax in the price of the product. Pricing is clean and uncluttered regardless of tax structures and rates that vary from country to country.

> **Important!** When cross-border trade is enabled, your profit margin changes by tax rate. Profit is determined by the formula: (Revenue - CustomerVAT - CostOfGoodsSold).

To enable cross-border price consistency:

1. On the Admin sidebar, choose **Stores**. Then under Settings, choose **Configuration**.
2. For a multisite configuration, set **Store View** to the website and store that is the target of the configuration.
3. In the panel on the left, under **Sales**, choose **Tax**.
4. Expand the **Calculation Settings** section. Then, do the following:



Calculation Settings

a. Set **Catalog Prices** to "Including Tax."

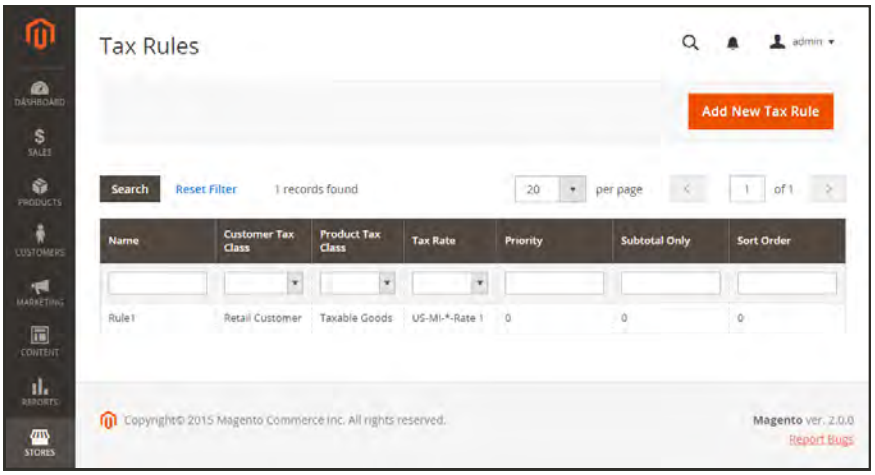
b. To enable cross-border price consistency, set **Enable Cross Border Trade** to "Yes."

5. When complete, tap **Save Config**.

Tax Rules

Tax rules incorporate a combination of product class, customer class and tax rate. Each customer is assigned to a customer class, and each product is assigned a product class. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the customer and product classes, and the region (based on the customer's shipping address, billing address or shipping origin).

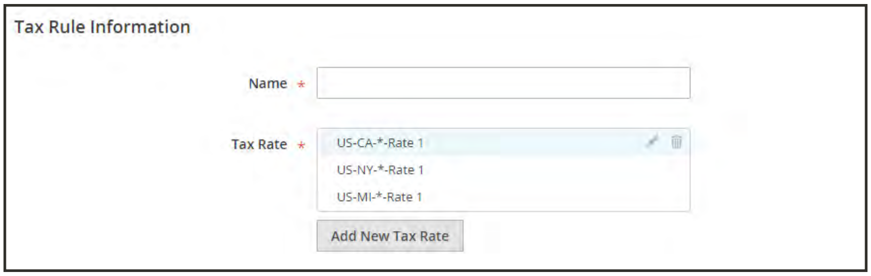
> When numerous taxes must be defined, you can simplify the process by importing them.



Tax Rules

Step 1: Complete the Tax Rule Information

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. In the upper-right corner, tap **Add New Tax Rule**.
3. Under Tax Rule Information, enter a **Name** for the new rule.
4. Choose the **Tax Rate** that applies to the rule. If you need to edit an existing tax rate, do the following:
   a. Hover over the tax rate, and tap the **Edit** icon.
   b. Update the form as needed, and tap **Save**.

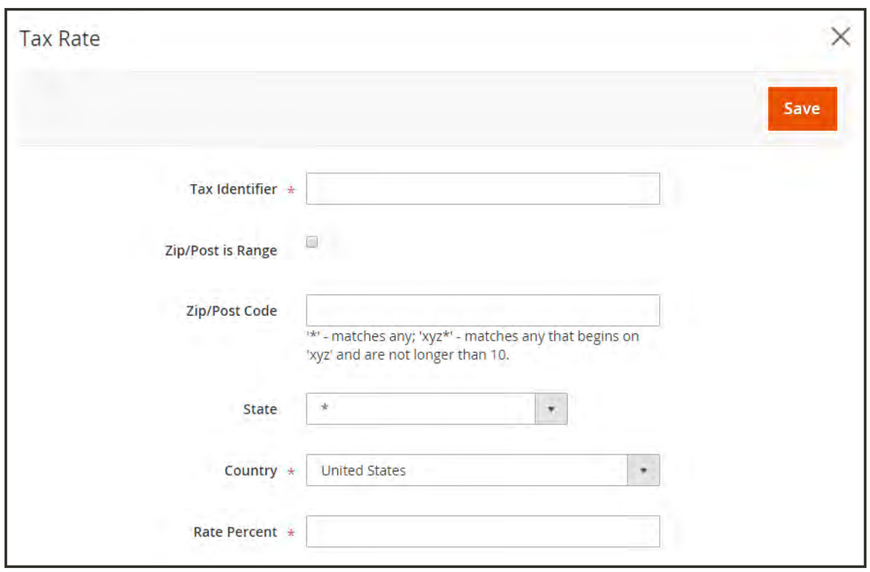


Tax Rule Information

To enter tax rates, use either of the following methods:

Method 1: Enter Tax Rates Manually

1. Tap **Add New Tax Rate**.
2. Complete the form as needed. For more information, see: Tax Zones and Rates.
3. When complete, tap **Save**.



New Tax Rate

Method 2: Import Tax Rates

1. Scroll down to the section at the bottom of the page.
2. To import tax rates, do the following:
   a. Tap **Choose File**, and navigate to the CSV file with the tax rates to be imported.
   b. Tap **Import Tax Rates**.
3. To export tax rates, tap **Export Tax Rates**.

   To learn more, see: Import/Export Tax Rates.

Import / Export Tax Rates

Step 2: Complete the Additional Settings

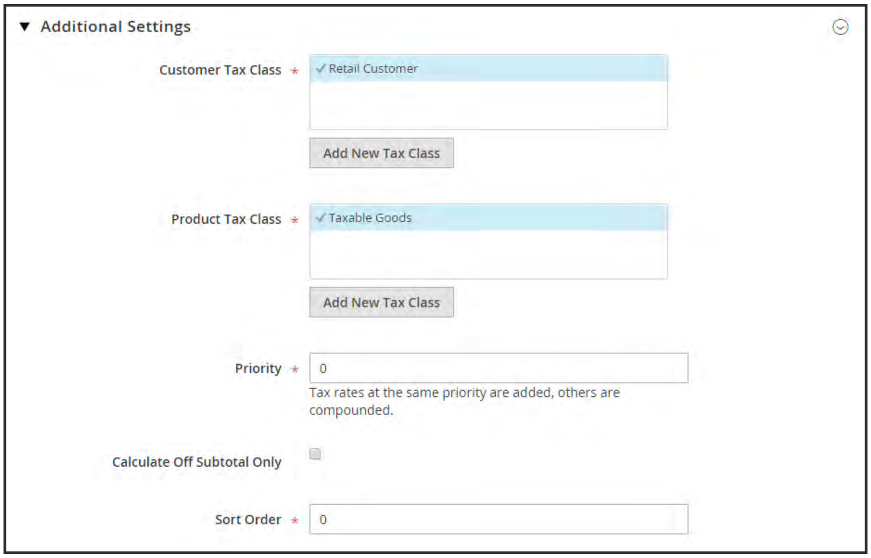
4. Tap **Additional Settings** to open the section. Then, do the following:
   a. Choose the **Customer Tax Class** to which the rule applies.
      - To edit a customer tax class, tap the edit icon. Then, update the form as needed, and tap **Save**.
      - To create a new tax class, tap **Add New Tax Class**. Then, complete the form as needed, and tap **Save**.

   b. Choose the **Product Tax Class** to which the rule applies.
      - To edit a product tax class, tap the edit icon. Then, update the form as needed, and tap **Save**.
      - To create a new tax class, tap **Add New Tax Class**. Then, complete the form as needed, and tap **Save**.

   c. In the **Priority** field, enter a number to indicate the priority of this tax, when more than one tax applies. If two tax rules with the same priority apply, then the taxes are added together. If two taxes with different priority settings apply, then the taxes are compounded.

   d. If you want taxes to be based on the order subtotal, mark the **Calculate off Subtotal Only** checkbox.

   e. In the **Sort Order** field, enter a number to indicate the order of this tax rule when listed with others.



Additional Settings

5. When complete, tap **Save Rule**.

Tax Classes

Tax classes can be assigned to customers, products, and shipping. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the class of the customer, the class of the products in the cart, and the region (as determined by the customer's shipping address, billing address or shipping origin). New tax classes can be created when a tax rule is defined.

Customer

You can create as many customer tax classes as you need, and assign them to customer groups. For example, in some jurisdictions, wholesale transactions are not taxed, but retail transactions are. You can associate members of the Wholesale Customer group with the Wholesale tax class.

Product

Product classes are used in calculations to determine the correct tax rate is applied in the shopping cart. When you create product, it is assigned to a specific tax class. For example, food might not be taxed, or be taxed at a different rate.

Shipping

If your store charges an additional tax on shipping, you should designate a specific product tax class for shipping. Then in the configuration, specify it as the tax class that is used for shipping.

Configuring Tax Classes

The tax class that is used for shipping, and the default tax classes for products and customers are set in the Sales configuration.

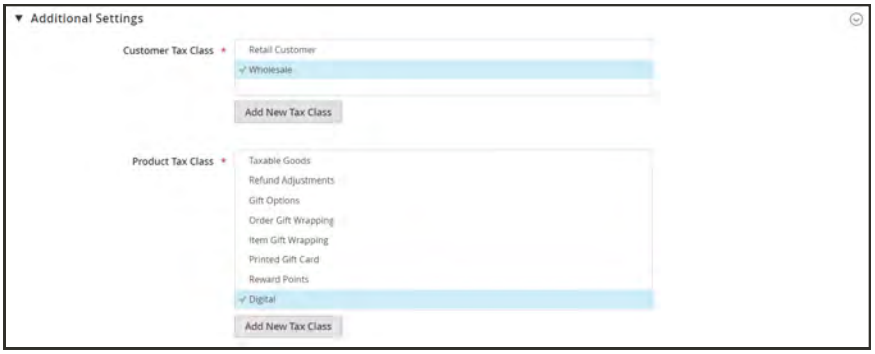
Tax Classes

To configure tax classes:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand the **Tax Classes** section. Then, choose the tax class for each of the following:
    - Set Tax Class for Shipping
    - Default Tax Class for Product
    - Default Tax Class for Customer
4. When complete, tap **Save Config**.

Adding New Tax Classes

Tax classes for customers and products can be easily added, and then assigned to individual customers and products, and used in tax rules.



New Tax Classes

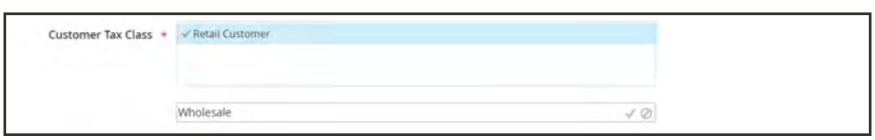
To add a new tax class:

1. On the Admin sidebar, choose **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. Tap **Add New Tax Rule**. Then, expand the **Additional Settings** section.
3. To add a new Customer Tax Class, do the following:

   a. Under **Customer Tax Class**, tap **Add New Tax Class**.

Add New Tax Class

   b. Enter the **Name** of the new tax class in the text box. Then, click the checkmark to add the new class to the list of available customer tax classes.

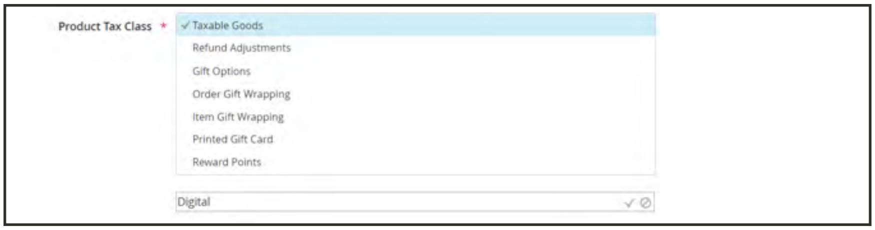


Wholesale Tax Class

4. To add a new Product Tax Class, do the following:

   a. Under **Product Tax Class**, tap **Add New Tax Class**.

   b. Enter the **Name** of the new tax class in the text box. Then, click the checkmark to add the new class to the list of available product tax classes.



Digital Product Tax Class

5. When complete, tap **Back** in the button bar to return to the Tax Rules grid.

Default Tax Destination

The default tax destination settings determine the country, state, and ZIP or postal code that are used as the basis of tax calculations.

Default Tax Destination Calculation

To configure the default tax destination for calculations:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configure**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand the **Default Tax Destination Calculation** section. Then, do the following:
   a. Set **Default Country** to the country upon which tax calculations are based.
   b. Set **Default State** to the state or province that is used as the basis of tax calculations.
   c. Set **Default Post Code** to the ZIP or postal code that is used as the basis of local tax calculations.
4. When complete, tap **Save Config**.

EU Place of Supply for Digital Goods

European Union (EU) merchants must report their digital goods sold by quarter to each member country. Digital goods are taxed based on the customer's shipping address. The law requires merchants to run a tax report and identify the relevant tax amounts for digital goods, as opposed to physical goods.

Merchants must report all digital goods sold by EU member countries on a quarterly basis to a central tax administration, along with payment due for tax collected during the period.

Merchants who have not yet reached the threshold (50k/100k Euro of annual business) must continue to report physical goods sold to the EU states where they have registered VAT numbers.

Merchants who are audited for taxes paid for digital goods, must provide two pieces of supporting information to establish the customer place of residence.

- The customer's shipping address and a record of a successful payment transaction can be used to establish the customer place of residence. (Payment is accepted only if the shipping address matches payment provider information.)
- The information can also be captured directly from the data store in the Magento database tables.

To collect digital goods tax information:

1. Load the tax rates for all EU member countries.
2. Create a digital goods product tax class.
3. Assign all your digital goods to the digital goods product tax class.
4. Create tax rules for your physical goods, using physical product tax classes, and associate them with the appropriate tax rates.
5. Create tax rules for your digital goods, using the product tax class for digital goods, and associate them with the appropriate tax rates for EU member countries.
6. Run the tax report for the appropriate period, and collect the required digital goods information.
7. Export the tax amounts that are related to the tax rates for the digital goods product tax class.

See also:

European Commission Taxation and Customs Union

EU 1015 Place of Supply Changes

Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products. You can set up a fixed product tax (FPT) as needed for your store's tax calculations. For example, in some countries FPT can be used to set up a Waste Electrical and Electronic Equipment Directive (WEEE) tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Fixed product taxes apply at the item level, based on the product. In some jurisdictions this tax is subject to an additional % tax calculation. Your tax jurisdiction might also have rules about how the product price appears to customers, either with or without tax. Be sure that you understand the rules, and set your FPT display options accordingly.

We recommend that you exercise caution when quoting FPT prices in email, because the difference in price can affect customer confidence in their orders. For example, if you display Order Review prices without showing FPT, customers who buy items with associated FPT will see a total that includes the FPT tax amount, but without an itemized breakdown. The difference in price might lead some customers to abandon their carts because the total differs from the amount expected.

FPT Display Prices

FPT	DISPLAY SETTING AND CALCULATION	
Not Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is added to the base price of an item; but is not included in tax- rule-based calculations.
	Excluding FPT, FPT Description, Final Price	Prices appeare without FPT amount or description. FPT is not included in tax-rule-based calculations.
Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is included in the price of an item, and no change to tax calculations is required.
	Excluding FPT, FPT Description, Final Price	Prices appear without the FPT amount or description. However, FPT is included in tax-rule-based calculations.

Configuring FPT

The Fixed Product Tax input type creates a section of fields for managing tax for each region.

The following instructions show how to set up a fixed product tax for your store, using "eco tax" as an example. After setting the scope for the tax and the countries and states where the tax applies, and depending on the options you choose, the input fields can change according to the local requirements. To learn more, see: Creating Attributes.

Process Overview:

Step 1: Enable Fixed Product Tax

Step 2: Create an FPT Attribute

Step 3: Add the FPT Attribute to an Attribute Set

Step 4: Apply FPT to Products

Step 1: Enable Fixed Product Tax

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Tax**.
3. Expand the **Fixed Product Taxes** section. Then, do the following:

   a. Set **Enable FPT** to "Yes."

   b. To determine how fixed product taxes are used in store prices, choose the FPT setting for each of the following price display locations. (The options are the same for each location.)

   - Product View Page
   - Sales Modules
   - Emails

OPTIONS
Including FPT Only
Including FPT and FPT description
Excluding FPT. Including FPT description and final price
Excluding FPT

   c. Set **Apply Tax to FPT** as needed.

   d. Set **Include FPT in Subtotal** as needed.

Fixed Product Taxes

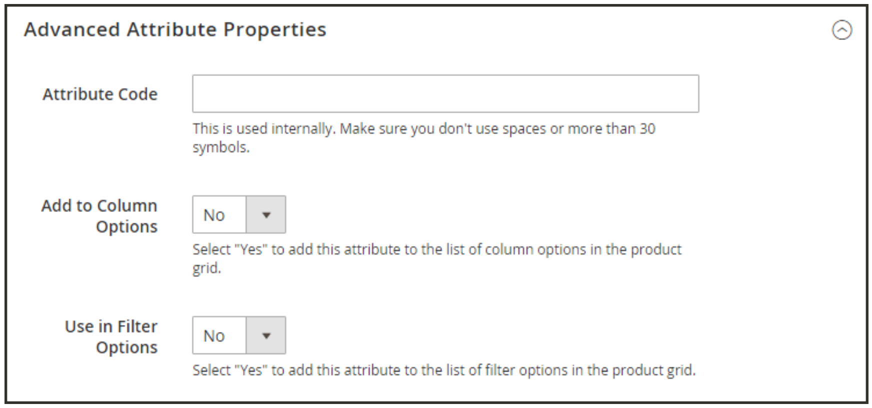
4. When complete, tap **Save Config**.

Step 2: Create an FPT Attribute

1. On the Admin sidebar, tap **Stores**. Then under **Attributes** choose **Product**.
2. In the upper-right corner, tap **Add New Attribute**. Then, do the following:
   a. Enter a **Default Label** to identify the attribute.
   b. Set **Catalog Input for Store Owner** to "Fixed Product Tax."

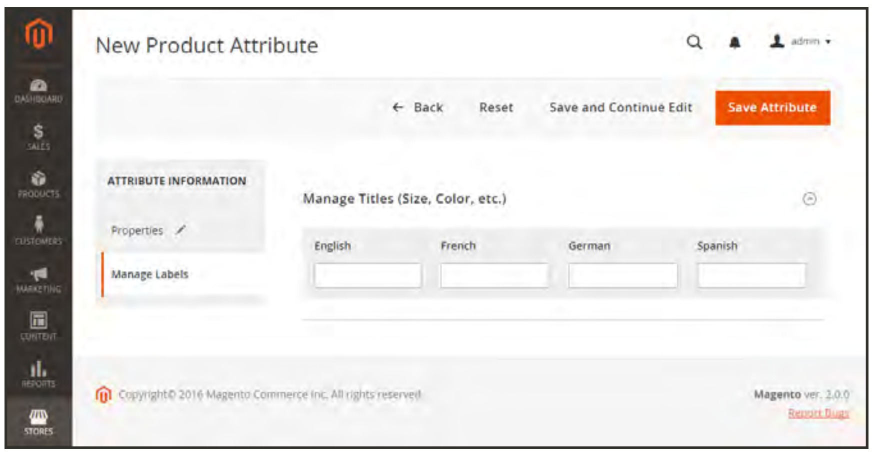
Attribute Properties

3. Expand the **Advanced Attribute Properties** section. Then, do the following:
   a. In the **Attribute Code** field, enter a unique identifier in lowercase, without spaces or special characters. The maximum length is 30 characters. You can leave the field blank to the text from the Default Label field.
   b. If you want the FPT field to appear in the Inventory grid, set **Add to Column Options** to "Yes."
   c. If you want to be able to filter products in the grid based on the value of the FPT field, set **Use in Filter Options** to "Yes."



Advanced Attribute Properties

4. (Optional) In the panel on the left, choose **Manage Labels**. Then, enter a label to use instead of the default label for each store view.



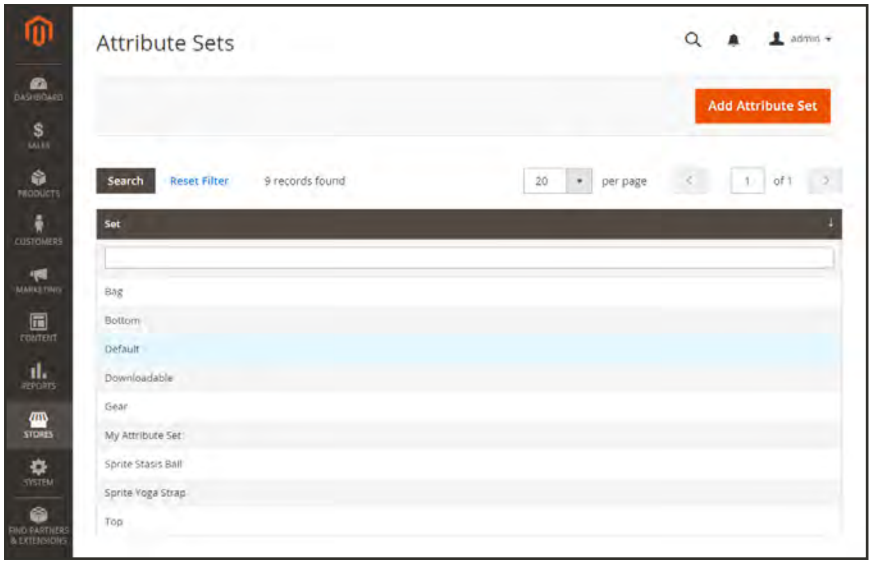
Manage Labels

5. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.

Step 3: Add the FPT Attribute to an Attribute Set

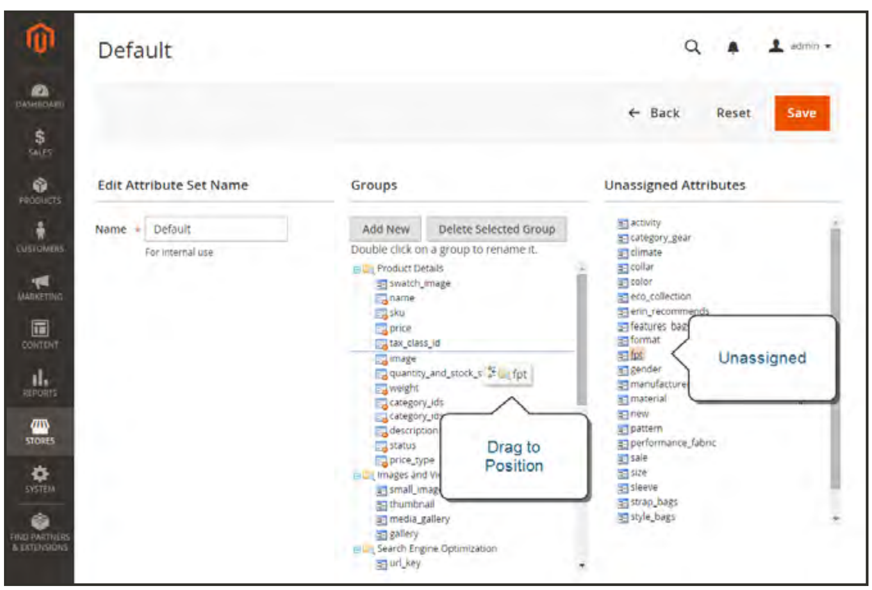
1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Attribute Set**.

2. In the list, tap the attribute set to open the record in edit mode.



3. Drag the FPT attribute from the list of **Unassigned Attributes** on the right to the **Groups** list in the center column.

   Each group folder corresponds to a section of product information. You can place the attribute wherever you want it to appear when the product is open in edit mode.



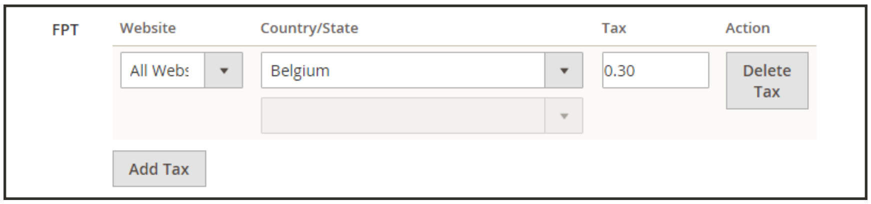
Edit Attribute Set

4. When complete, tap **Save**.

5. Repeat this step for each attribute set that needs to include fixed product tax.

Step 4: Apply FPT to Specific Products

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open the product that needs a fixed product tax in edit mode.
3. Find the FPT section of fields that you added to the attribute set. Tap **Add Tax**, and do the following:



Fixed Product Tax for Belgium

   a. If your Magento installation has multiple websites, choose the appropriate **Website** and base currency. In this example, the field is set by default to "All Websites [USD],"
   a. Set **Country/State** to the region where the fixed product tax applies.
   b. Enter the fixed product tax as a decimal amount in the **Tax** field.
   c. To add more fixed product taxes, tap **Add Tax**, and repeat the process.
4. When complete, tap **Save**.

Price Display Settings

The price display settings determine if product and shipping prices include or exclude tax, or show two versions of the price; one with, and the other without tax.

If the product price includes tax, the tax appears only if there is a tax rule that matches the tax origin, or if a customer address matches the tax rule. Events that can trigger a match include when a customer creates an account, logs in, or generates a tax and shipping estimate from the shopping cart.

Important! Showing prices that include and exclude tax can be confusing to the customer. To avoid triggering a warning message, see the guidelines for your country, and recommended settings. to avoid warning messages.

Price Display Settings

Step 1: Configure Price Display Settings

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Taxes**.
3. Expand the **Price Display Settings** section. Then, do the following:

   a. Set **Display Product Prices in Catalog** to one of the following:

      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax

   b. Set **Display Shipping Prices** to one of the following:

      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax

Step 2: Configure Shopping Cart Display Settings

1. Expand the **Shopping Cart Display Settings** section. Then, do the following:

Shopping Cart Display Settings

   a. Set **Display Prices** to one of the following:

      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax

   b. Set **Display Subtotal** to one of the following:

      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax

   c. Set **Display Shipping Amount** to one of the following:

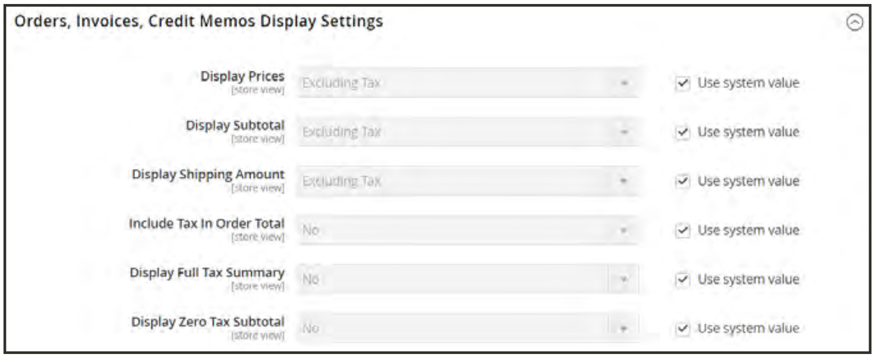
      - Excluding Tax
      - Including Tax
      - Including and Excluding Tax

   d. Set the following to “Yes” or “No” according to your preference:

      - Include Tax in Order Total
      - Display Full Tax Summary
      - Display Zero Tax Subtotal

Step 3: Configure Order, Invoice & Credit Memo Display Settings

1. Expand the **Orders, Invoices, Credit Memos Display Settings** section. Then, do the following:



Orders, Invoices, Credit Memos Display Settings

   a. Set **Display Prices** to one of the following:

   - Excluding Tax
   - Including Tax
   - Including and Excluding Tax

   b. Set **Display Subtotal** to one of the following:

   - Excluding Tax
   - Including Tax
   - Including and Excluding Tax

   c. Set **Display Shipping Amount** to one of the following:

   - Excluding Tax
   - Including Tax
   - Including and Excluding Tax

   d. Set the following to “Yes” or “No” according to your preference:

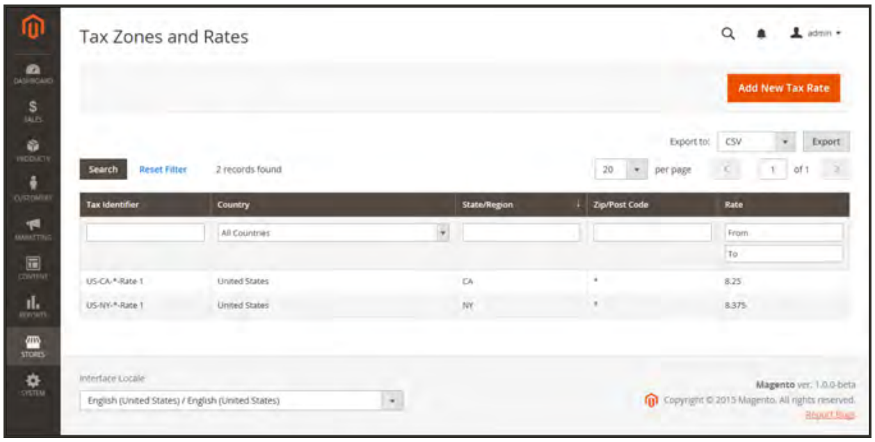
   - Include Tax in Order Total
   - Display Full Tax Summary
   - Display Zero Tax Subtotal

2. When complete, tap **Save Config**.

Tax Zones and Rates

Tax rates generally apply to transactions that take place within a specific geographical area. The Tax Zones and Rates tool enables you to specify the tax rate for each geographical area from which you collect and remit taxes. Because each tax zone and rate has a unique identifier, you can have multiple tax rates for a given geographic area (such as places that do not tax food or medicine, but do tax other items).

Store tax is calculated based on the store's address. The actual customer tax for an order is calculated after the customer completes the order information. Magento then calculates the tax based upon the tax configuration of the store.

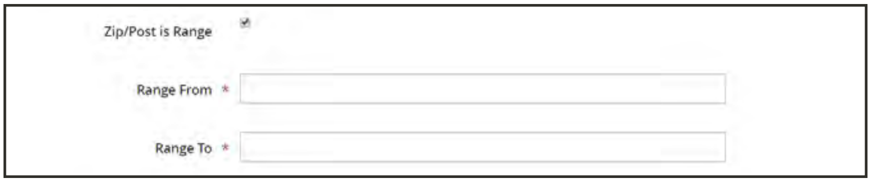


Tax Zones and Rates

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. Then in the **Range From** and **Range To** fields, enter the first and last ZIP or postal code to define the range.



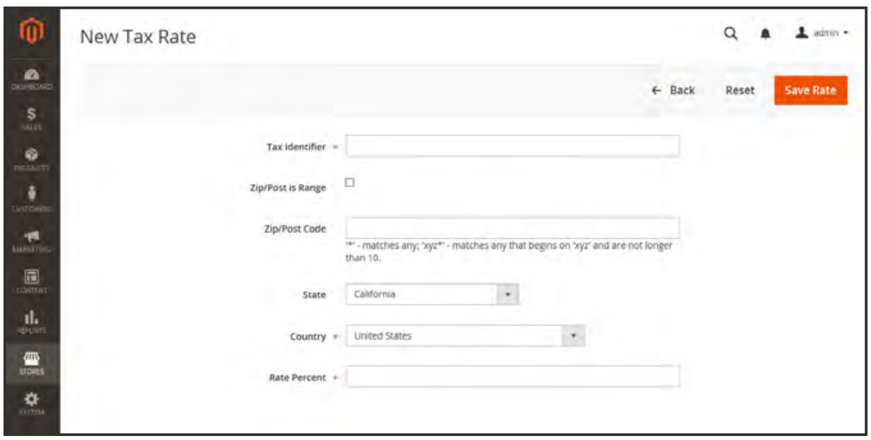
ZIP/Post is Range

b. Choose the **State** where the tax rate applies.

c. Choose the **Country** where the tax rate applies.

d. Enter the **Rate Percent** that is used for the tax rate calculation.

7. When complete, tap **Save Rate**.



New Tax Rate

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.

> **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

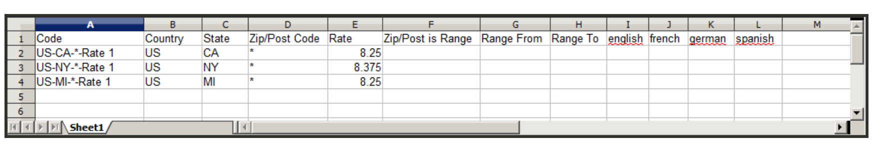
1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import/Export Tax Rates**.

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



Code	Country	State	Zip/Post Code	Rate	Zip/Post is Range	Range From	Range To	english	french	german	spanish
US-CA-*-Rate 1	US	CA	*	8.25							
US-NY-*-Rate 1	US	NY	*	8.375							
US-MI-*-Rate 1	US	MI	*	8.25							

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**.

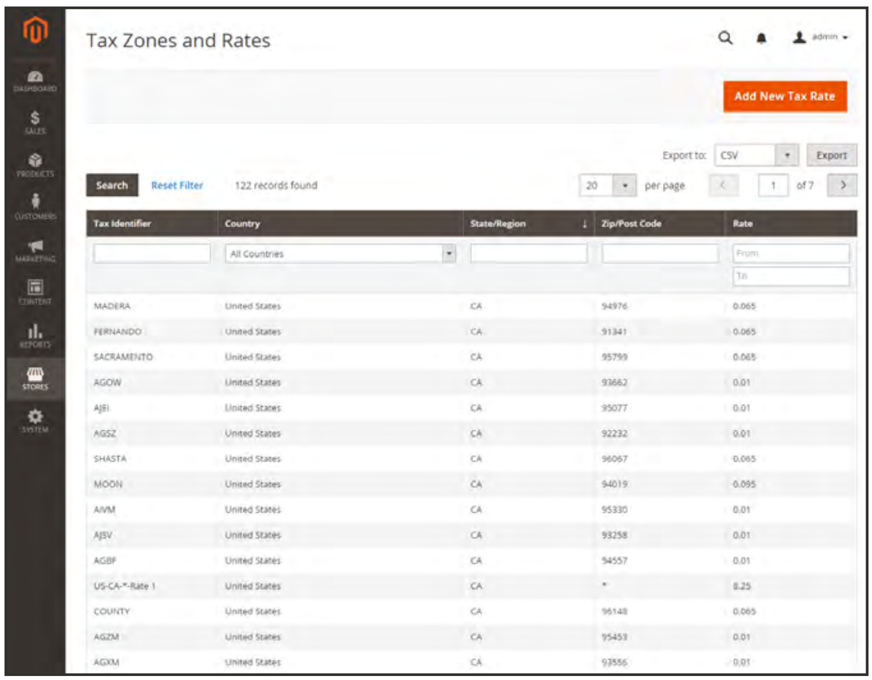
Step 3: Import the Tax Rates

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 some cases, you might need to use more than one VAT rate in your store for tax calculation purposes.

Magento can be set up to charge a value-added tax if both the merchant and customer are located in the same EU country. No VAT is charged if the merchant and customer are located in different EU countries.

However, for the sale of downloadable products — or digital goods —, the VAT rate is based on the shipping destination, rather than the merchant location. To learn more, see: EU Place of Supply for Digital Goods.

Magento uses the following fields and configuration settings to address different scenarios.

Summary of VAT Fields

SECTION	DESCRIPTION	
MERCHANT INFORMATION		
Stores > Configuration > General > General > Store Information		
Store Information	VAT Number	The value-added tax number that is assigned to the merchant.
	Validate VAT Number	VAT validation confirms that the VAT Number matches the corresponding record in the European Commission database.
CUSTOMER INFORMATION		
Customers > All Customers > Edit		
Account Information	Tax/VAT Number	If applicable, the tax number or value-added tax number that is assigned to the customer.
Addresses	VAT Number	If applicable, the value-added tax number that is associated with a specific billing or shipping address of the customer. For the sale of digital goods within the EU, the amount of the VAT is based on shipping destination.

Summary of VAT Fields (cont.)

SECTION	DESCRIPTION	
Configure > Customers > Customer Configuration		
Create New Account Options	Show VAT Number on Storefront	Determines if the customer VAT Number field is included in the Address Book that is available in the customer account.
	Default Value for Disable Automatic Group Changes Based on VAT ID	VAT ID is an internal identifier for the VAT Number of the customer when used in VAT Validation. During VAT Validation, Magento confirms that the number matches the European Commission database. Customers can be automatically assigned to one of the four default customer groups based on the validation results.

Configuring VAT

The following instructions include a sample procedure to set up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

> Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. To learn more, see: VAT ID Validation.

Process Overview:

Step 1: Set Up Customer Tax Classes

Step 2: Set Up Product Tax Classes

Step 3: Set Up Tax Zones and Rates

Step 4: Set Up Tax Rules

Step 5: Apply Tax Classes to Products

Step 1: Set Up Customer Tax Classes

1. On the Admin sidebar, tap **Stores**. Then, choose, **Tax Zones and Rates**.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named Retail Customer. If Retail Customer does not exist, click the **Add New** button and add it.

Step 2: Set Up Product Tax Classes

1. On the Admin menu, select **Sales > Tax > Product Tax Classes**.
2. Click the **Add New** button and create three new classes:
   - VAT Standard
   - VAT Reduced
   - VAT Zero
3. Click the **Save Class** button for each new class that you add.

Step 3: Set Up Tax Zones and Rates

1. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**.

   For this example you can remove the U.S. tax rates, or leave them as they are.
2. Click the **Add New Tax Rate** button. Add new rates as follows:

NEW TAX RATE	SETTINGS	
VAT Standard	Tax Identifier:	VAT Standard
	Country and State:	United Kingdom
	Rate Percent:	20.00
VAT Reduced	Tax Identifier:	VAT Reduced
	Country and State:	United Kingdom
	Rate Percent:	5.00

3. Click the **Save Rate** button for each rate.

Step 4: Set Up Tax Rules

A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

1. On the Admin menu, select **Sales > Tax > Manage Tax Rules**.

2. Add new tax rules as follows:

NEW TAX RULE	SETTINGS	
VAT Standard	Name:	VAT Standard
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Standard
	Tax Rate:	VAT Standard Rate
VAT Reduced	Name:	VAT Reduced
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Reduced
	Tax Rate:	VAT Reduced Rate

3. Click the **Save Rule** button for each rate.

Step 5: Apply Tax Classes to Products

1. On the Admin menu, select **Catalog > Manage Products**.

2. Open a product from your catalog in edit mode.

3. On the General page, find the **Tax Class** field. Then, select the **VAT Class** that applies to the product.

4. When complete, click the **Save** button.

VAT ID Validation

VAT ID Validation automatically calculates the required tax for B2B transactions that take place within the European Union (EU), based on the merchant and customer locale. Magento performs VAT ID validation using the web services of the European Commission server.

> VAT-related tax rules do not influence other tax rules, and do not prevent the application of other tax rules. Only one tax rule can be applied at a given time.

- VAT is charged if the merchant and customer are located in the same EU country.
- VAT is not charged if the merchant and customer are located in different EU countries, and both parties are EU-registered business entities.

The store administrator creates more than one default customer group that can be automatically assigned to the customer during account creation, address creation or update, and checkout. The result is that different tax rules are used for intra-country (domestic) and intra-EU sales.

> **Important:** If you sell virtual or downloadable products, which by their nature do not require shipping, the VAT rate of a customer’s location country should be used for both intra-union and domestic sales. You must create additional individual tax rules for product tax classes that correspond to the virtual products.

Customer Registration Workflow

If VAT ID Validation is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. The group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

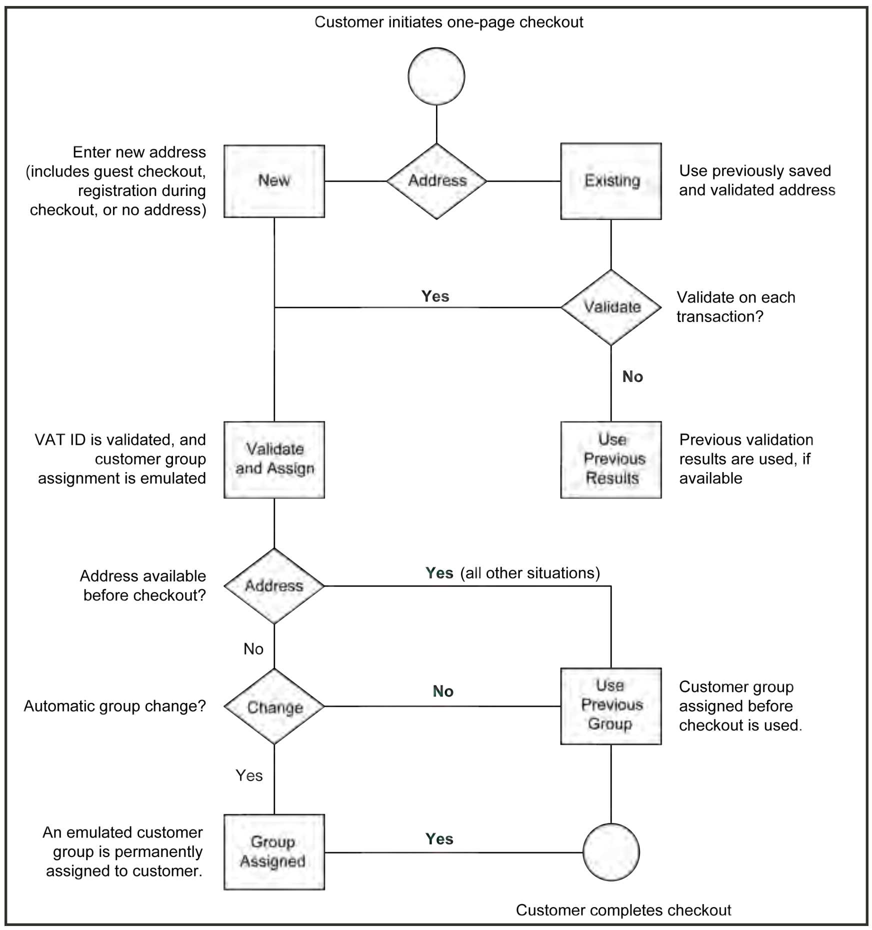
If enabled, you can override VAT ID Validation for individual customers by selecting the checkbox on the Customer Information page.

Checkout Workflow

If a customer's VAT validation is performed during checkout, the VAT request identifier and VAT request date are saved in the Comments History section of the order.

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the Validate on Each Transaction and the Disable Automatic Group Change settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the Validate on Each Transaction setting cannot be applied. Thus the customer group cannot change during checkout.



VAT Validation Checkout Workflow

Configuring VAT ID Validation

To configure VAT ID validation, you must first set up the customer groups that are needed, and create the related tax classes, rates, and rules. Then, enable VAT ID validation for the store, and complete the configuration.

The following examples show how tax classes and rates are used for VAT ID Validation. Take a look at the examples, and then follow the instructions to set up the tax classes and rules that are needed for your store.

Example: Minimal Tax Rules Required for VAT ID Validation

TAX RULE #1	
Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	Product tax classes must include a class for products of all types, except bundle and virtual.
Tax Rate	The tax rate must include the VAT rate of the merchant’s country.

TAX RULE #2	
Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for products of all types, except virtual.
Tax Rate	VAT rates for all EU countries, except merchant’s country. Currently this rate is 0%.

TAX RULE #3 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)	
Customer Tax Class	Customer tax classes must include: A class for domestic customers A class for customers with invalid VAT ID A class for customers, for whom VAT ID validation failed
Product Tax Class	A class for virtual products.
Tax Rate	VAT rate of the merchant’s country.

TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)	
Customer Tax Class	A class for intra-union customers.

TAX RULE #4 (REQUIRED FOR VIRTUAL AND DOWNLOADABLE PRODUCTS)	
Product Tax Class	A class for virtual products.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

Process Overview:

Step 1: Create VAT-Related Customer Groups

Step 2: Create VAT-Related Classes, Rates and Rules

Step 3: Enable and Configure VAT ID Validation

Step 4: Set your VAT ID and Location Country

Step 5: Verify the List of EU Member Countries

Step 1: Create VAT-Related Customer Groups

VAT ID Validation automatically assigns one of the four default customer groups to customers according to VAT ID validation results:

- Domestic
- Intra-EU
- Invalid VAT ID
- Validation error

You can create new customer groups for VAT ID Validation or use existing groups, if they comply with your business logic. When configuring VAT ID Validation, you must assign each of the created customer groups as a default for customers with appropriate VAT ID validation results.

Step 2: Create VAT-Related Classes, Rates, and Rules

Each tax rule is defined 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.

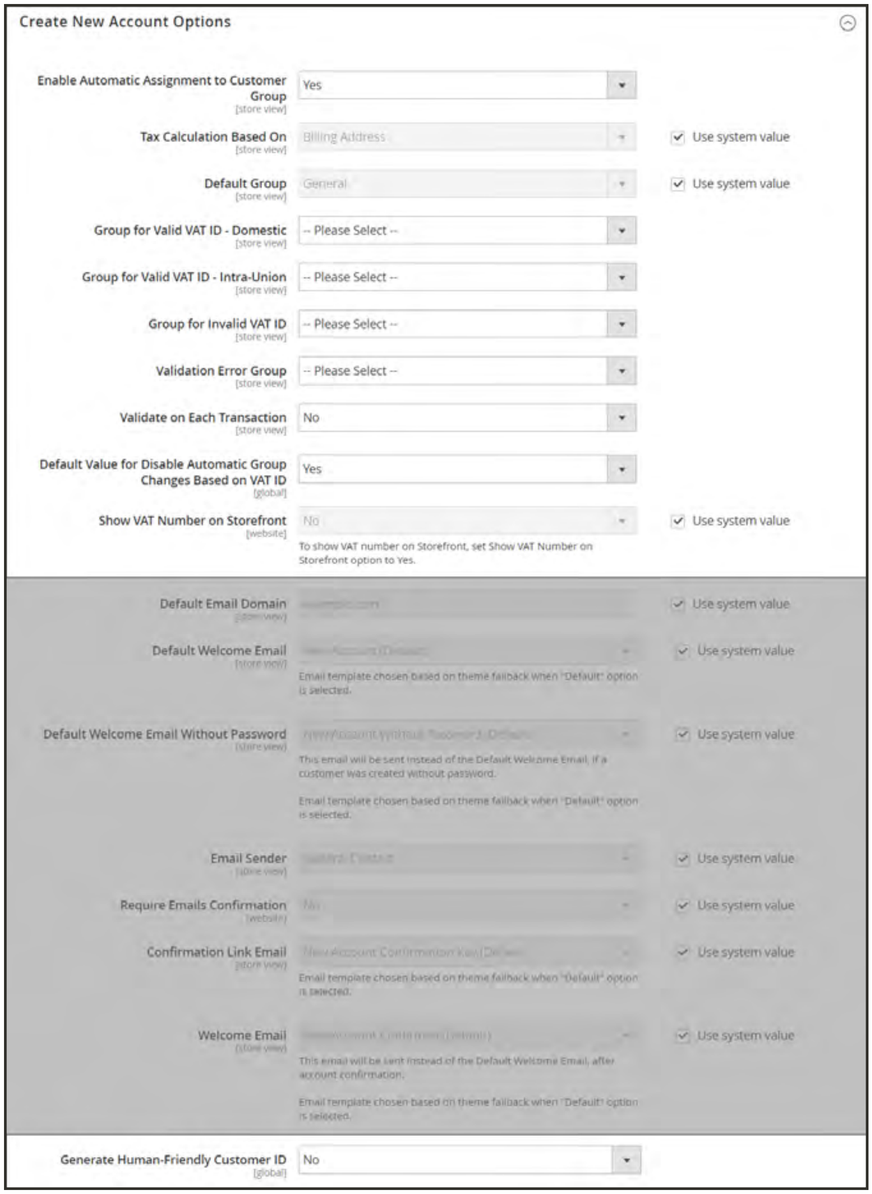
Step 3: Enable and Configure VAT ID Validation

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.

   In the following screenshot, the general customer settings that are not related to VAT Validation are grayed out.



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. In the Configuration panel on the left under **General**, choose **General**.
2. 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.

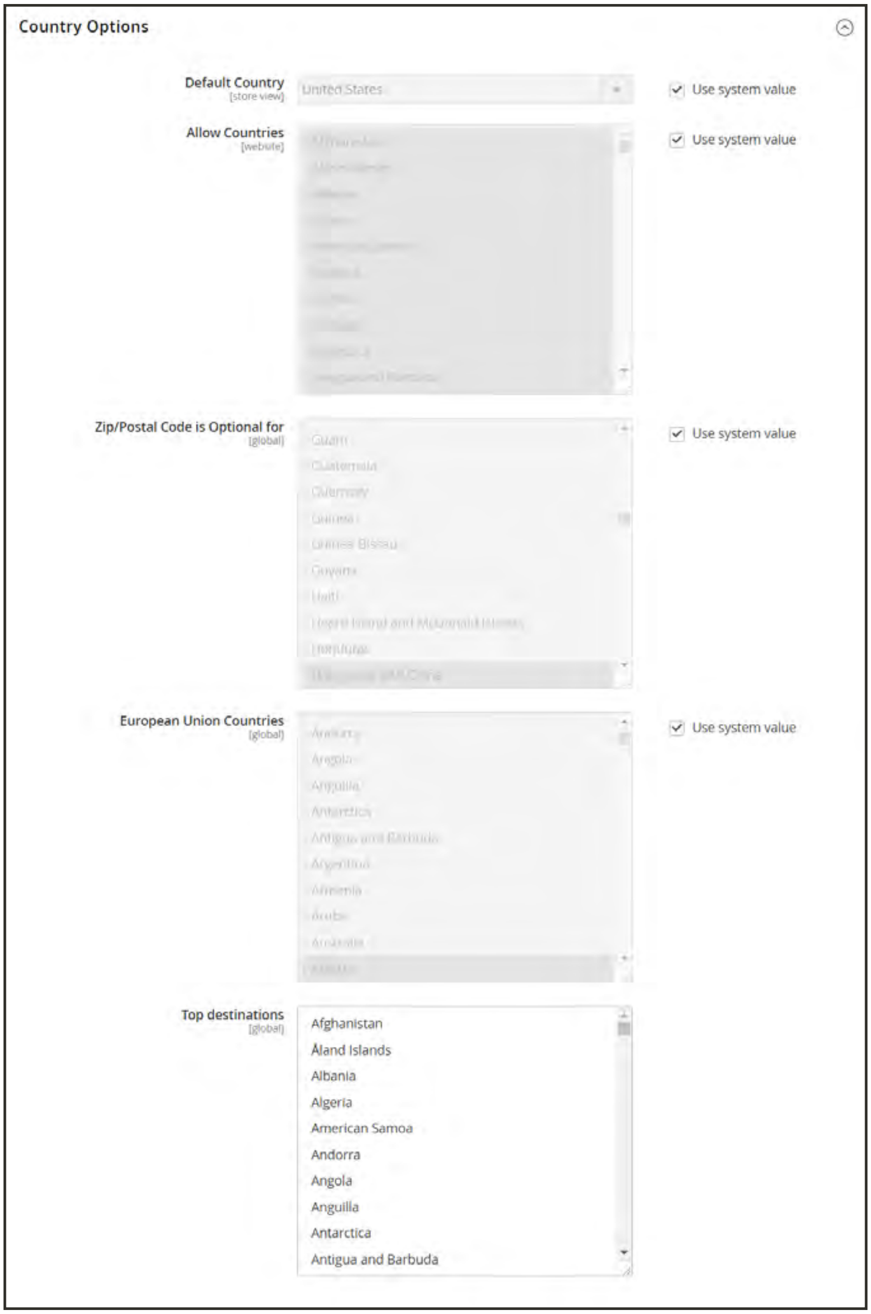
3. When complete, tap **Save Config**.

Step 5: Verify the List of EU Member Countries

1. Continuing in the General configuration section, expand the **Countries Options** section.
2. In the list of **European Union Countries**, verify that each member country of the EU is selected.

   To change the default setting, clear the **Use system values** checkbox. Then, hold down the **Ctrl** key, and click each country that you want to add, or remove.

3. When complete, tap **Save Config**.



Countries Options

Tax Quick Reference

Some tax settings have a choice of options that determines the way the tax is calculated and presented to the customer. To learn more, see: International Tax Guidelines.

Tax Calculation Methods

Tax calculation method options include Unit Price, Row Total, and Total. The following table explains how rounding (to two digits) is handled for different settings.

Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Unit Price	Magento calculates the tax for each item and displays prices tax-inclusive. To calculate the tax total, Magento rounds the tax for each item, and then adds them together.
Row Total	Magento calculates the tax for each line. To calculate the tax total, Magento rounds the tax for each line item and then adds them together.
Total	Magento calculates the tax for each item and adds those tax values to calculate the total unrounded tax amount for the order. Magento then applies the specified rounding mode to the total tax to determine the total tax for the order.

Catalog Prices With or Without Tax

The possible display fields vary depending on the calculation method and whether the catalog prices include or exclude taxes. Display fields have two-decimal precision in normal computations. Some combinations of price settings display prices that both include and exclude tax. When both appear on the same line item, it can be confusing to customers, and triggers a warning.

Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Excluding Tax	Using this setting, the base item price is used as it is entered and the tax calculation methods are applied.
IncludingTax	Using this setting, the base item price excluding tax is calculated first. This value is used as the base price, and the tax calculation methods are applied.

Important! Changes have been made from earlier versions for EU merchants or other VAT merchants who display prices including tax and operate in several countries with multiple store views. If you load prices with more than two digits of precision, Magento automatically rounds all prices to two digits to ensure that a consistent price is presented to buyers.

Shipping Prices With or Without Tax

Tax Configuration Options

SETTING	DISPLAY	CALCULATION
Excluding Tax	Appears without tax.	Normal calculation. Shipping is added to cart total, typically displayed as a separate item.
Including Tax	Can be tax inclusive, or tax can be displayed separately.	Shipping is treated as another item in cart with taxes, using the same calculations.

Tax Amounts as Line Items

To display two different tax amounts as separate line items, such as GST and PST for Canadian stores, you must set different priorities for the related tax rules. However, in previous tax calculations, taxes with different priorities would automatically be compounded. To correctly display separate tax amounts without an incorrect compounding of the tax amounts, you can set different priorities, and also select the Calculate off subtotal only checkbox. This produces correctly calculated tax amounts that appear as separate line items.

International Tax Guidelines

U.S. Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	No, because FPT is not taxed.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	No
Apply Discount	Before tax
Comment	All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.

UK B2C Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For merchants marking up supplier invoices (including VAT).

U.K. B2B Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On item

U.K. B2B Tax Configuration (cont.)

TAX OPTION	RECOMMENDED SETTING
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For B2B merchants to provide simpler VAT supply chain considerations. Tax calculation on row is also valid; however, check with your taxing jurisdiction. Setup assumes a merchant is in the supply chain and that goods sold are used by other vendors for VAT rebates and so on. This makes it easy to discern tax by item for faster rebate generation. Note that some jurisdictions require different rounding strategies not currently supported by Magento, and that not all jurisdictions allow item or row level tax.

Canada Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT, description, and apply tax to FPT.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax
Comment	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 Guidelines

These recommended settings can be used for most tax configurations for stores within the United States.

Tax Classes

TAX CLASS	RECOMMENDED SETTING
Tax Class for Shipping	None

Calculation Settings

CALCULATION	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Origin
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax

Default Tax Destination Calculation

SETTING	RECOMMENDED SETTING
Default Country	United States
Default State	State where business is located.
Default Post Code	The postal code that is used in your tax zones.

Price Display Settings

SETTING	RECOMMENDED SETTING
Display Product Prices in Catalog	Excluding Tax
Display Shipping Prices	Excluding Tax

Shopping Cart Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax

SETTING	RECOMMENDED SETTING
Display Shipping Amount	Excluding Tax
Display Gift Wrapping Prices	Excluding Tax
Display Printed Card Prices	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

Orders, Invoices, Credit Memos, Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

Fixed Product Taxes

SETTING	RECOMMENDED SETTING
Enable FPT	No, except in California.

Canadian Tax Guidelines

The following example shows how to set up GST tax rates for Canada and PST tax rates for Saskatchewan, with tax rules that calculate and display the two tax rates. Because this is an example configuration, be sure to verify the correct tax rates and rules for your tax jurisdictions. When setting up taxes, set the store scope to apply the configuration to all applicable stores and websites.

- Fixed product tax is included for relevant goods as a product attribute.
- In Quebec, PST is referred to as TVQ. If you need to set up a rate for Quebec, make sure to use TVQ as the identifier.

Process Overview:

Step 1: Complete the Tax Calculation Settings

Step 2: Set Up Canadian Goods & Services Tax (GST)

Step 3: Set Up Canadian Provincial Sales Tax (PST)

Step 4: Create a GST Tax Rule

Step 5: Create a PST Tax Rule for Saskatchewan

Step 6: Save and Test the Results

Step 1: Complete Tax Calculation Settings

1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Tax**.
2. Click to expand each section, and complete the following settings:

Tax Calculation Settings

FIELD	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax
Apply Tax On	Custom Price (if available)

Tax Classes

FIELD	RECOMMENDED SETTING
Tax Class for Shipping	Shipping (shipping is taxed)

Default Tax Destination Calculation

FIELD	RECOMMENDED SETTING
Default Country	Canada
Default State	(as appropriate)
Default Postal Code	* (asterisk)

Shopping Cart Display Settings

FIELD	RECOMMENDED SETTING
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero in Tax Subtotal	Yes

Fixed Product Taxes

FIELD	RECOMMENDED SETTING
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	No

Step 2: Set Up Canadian Goods & Services Tax (GST)

To print the GST number on invoices and other sales documents, include it in the name of the applicable tax rates. The GST will appear as part of the GST amount on any order summary.

Manage Tax Zones & Rates

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-GST
Country	Canada
State	* (asterisk)
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

Step 3: Set Up Canadian Provincial Sales Tax (PST)

Set up another tax rate for the applicable province.

Tax Rate Information

FIELD	RECOMMENDED SETTING
Tax Identifier	Canada-SK-PST
Country	Canada
State	Saskatchewan
Zip/Post is Range	No
Zip/Post Code	* (asterisk)
Rate Percent	5.0000

Step 4: Create a GST Tax Rule

To avoid compounding the tax and to correctly display the calculated tax as separate line items for GST and PST, you must set different priorities for each rule, and select the "Calculate off subtotal only" checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-GST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-GST
Priority	0
Calculate off subtotal only	Select this checkbox.
Sort Order	0

Step 5: Create a PST Tax Rule for Saskatchewan

For this tax rule, make sure to set the priority to 0 and select the "Calculate off subtotal only" checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-PST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-SK-PT
Priority	1
Calculate off subtotal only	Select this checkbox.
Sort Order	0

Step 6: Save and Test the Results

1. When complete, click the **Save Config** button.
2. Return to your storefront, and create a sample order to test the results.

EU Tax Guidelines

The following example depicts a store based in France that sells > 100k Euros in France and > 100k Euros in Germany.

- Tax calculations are managed at the website level.
- Currency conversion and tax display options are controlled individually at the store view level, (Click the Use Website checkbox to override the default).
- By setting the default tax country you can dynamically show the correct tax for the jurisdiction.
- Fixed product tax is included for relevant goods as a product attribute.
- It might be necessary to edit the catalog to ensure that it shows up in the correct category/website/store view.

Process Overview:

Step 1: Create Three Product Tax Classes

Step 2: Create Tax Rates for France and Germany

Step 3: Set Up the Tax Rules

Step 4: Set Up a Store View for Germany

Step 5: Configure Tax Settings for France

Step 6: Configure Tax Settings for Germany

Step 1: Create Three Product Tax Classes

For this example, it is assumed that multiple VAT-Reduced product tax classes are not needed.

1. Create a VAT-Standard product tax class.
2. Create a VAT-Reduced product tax class.
3. Create a VAT-Free product tax class.

Step 2: Create Tax Rates for France and Germany

Create the following tax rates:

Tax Rates

TAX RATE	SETTING	
France-StandardVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	20%
France-ReducedVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	5%
Germany-StandardVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	19%
Germany-ReducedVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	7%

Step 3: Set Up the Tax Rules

Create the following tax rules:

Tax Rules

TAX RULE	SETTING	
Retail-France-StandardVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Standard
	Tax Rate:	France-StandardVAT
	Priority:	0
	Sort Order:	0
Retail-France-ReducedVAT	Customer Class:	Retail Customer
	Tax Class:	VAT Reduced
	Tax Rate:	France-ReducedVAT
	Priority:	0
	Sort Order:	0
Retail-Germany-StandardVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Standard
	Tax Rate:	Germany-StandardVAT
	Priority:	0
	Sort Order:	0
Retail-Germany-ReducedVAT	Customer Class:	Retail Customer
	Tax Class:	VAT-Reduced
	Tax Rate:	Germany-ReducedVAT
	Priority:	0
	Sort Order:	0

Step 4: Set Up a Store View for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Under the default website, create a store view for **Germany**. Then, do the following:
   a. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
   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 CLASSES	
Tax Class for Shipping	Shipping (shipping is taxed)
CALCULATION SETTINGS	
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)

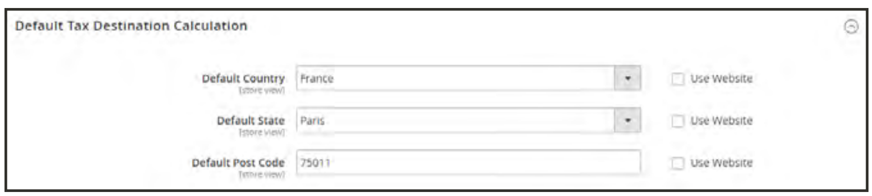
General Settings (cont.)

FIELD	RECOMMENDED SETTING
DEFAULT TAX DESTINATION CALCULATION	
Default Country	France
Default State	
Default Postal Code	* (asterisk)
SHOPPING CART DISPLAY SETTINGS	
Include Tax in Grand Total	Yes
FIXED PRODUCT TAXES	
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	Yes

Step 6: Configure Tax Settings for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the view to the German store. When prompted to confirm, tap **OK**.
3. In the panel on the left, under **Sales**,choose **Tax**.
4. In the **Default Tax Destination Calculation** section, do the following:
   a. Clear the **Use Website** checkbox after each field,
   b. Update the following values to match your site's Shipping Settings point of origin.
      - Default Country
      - Default State
      - Default Post Code

   This setting ensures that tax is calculated correctly when product prices include tax.



Default Tax Destination Calculation

5. When complete, tap **Save Config**.

Warning Messages

Some combinations of tax-related options might be confusing to customers and trigger a warning. These conditions might occur when the tax calculation method is set to “Row” or “Total,” and the customer is presented with prices that both exclude and include tax, or a tax on an item basis in the cart. Because the tax calculation is rounded, the amount that appears in the cart might differ from the amount that a customer expects to pay.

If your tax calculation is based on a problematic configuration, the following warnings appear:

Warning. Tax discount configuration might result in different discounts than a customer might expect for store(s); Europe Website (French), Europe Website (German). Please see source for more details.

Warning. Tax configuration can result in rounding errors for store(s): Europe Websites (French), Europe Websites (German).

Calculation Settings

Use the following tables for reference when configuring tax calculation settings:

Tax Calculation Method Based On: Excluding Tax

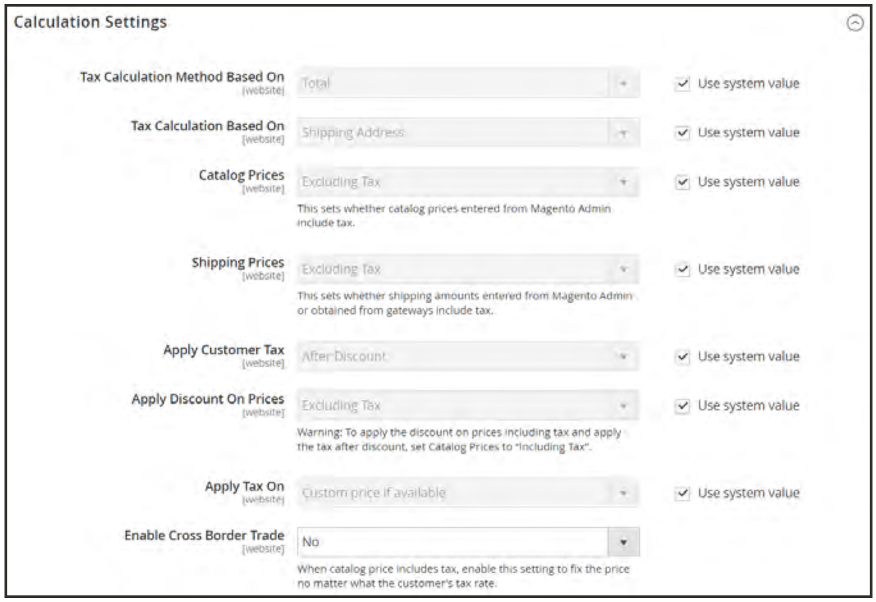
Tax Excluded

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Tax Class for Shipping	Shipping (is taxed)		
Excluding tax	OK	OK	OK
Including tax	OK	OK	OK
Including and Excluding tax	OK	OK	**Warning**

Catalog Prices: Including Tax

Tax Included

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Excluding tax	OK	OK	OK
Including tax	OK	OK	OK
Including and Excluding tax	OK	**Warning**	**Warning**



Calculation Settings

Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

Recommended Settings

FIELD	RECOMMENDED SETTING	
Apply Customer Tax	After Discount	
Apply Discount on Prices	US and Canada	Excluding Tax
	EU	Including Tax

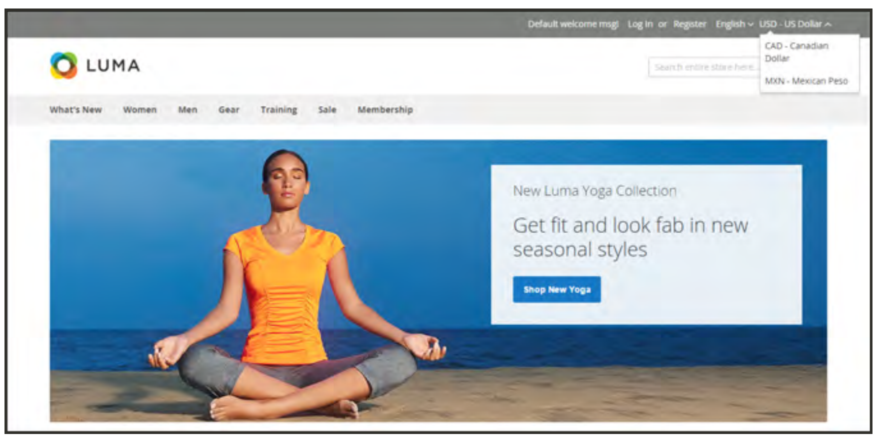
CHAPTER 95:

Currency

Magento Commerce gives you the ability to accept currencies from more than two hundred countries around the world. If the store supports multiple currencies, a Currency Chooser appears in the header after currency rates are updated.

> If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can impact your profit margin.

Currency symbols appear in product prices and sales documents such as orders and invoices. You can customize the currency symbols as needed, and also set the display of the price separately for each store or view.

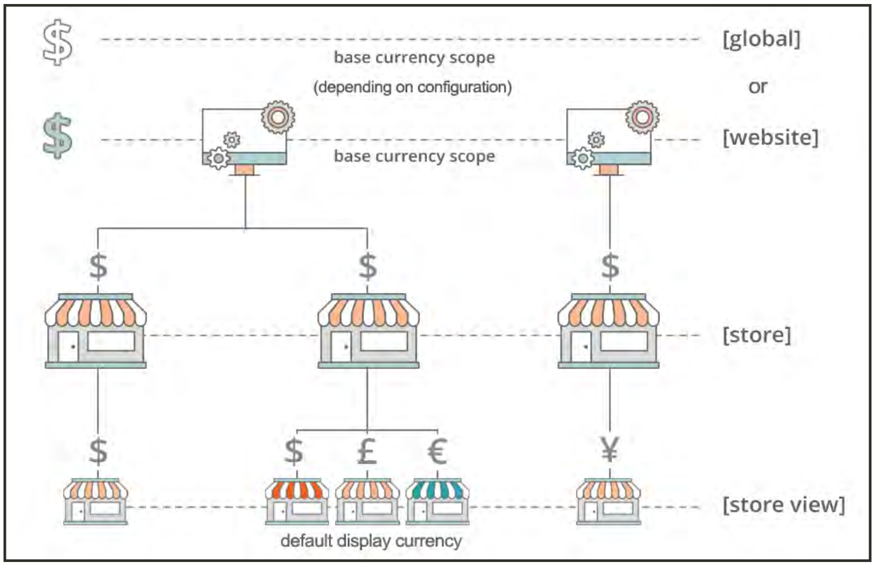


Currency Chooser

Currency Configuration

Before setting up individual currency rates, you must first set the scope of the base currency, By default, it is set to global, which applies the base currency setting to the entire store hierarchy. If you have a multisite installation of Magento, you can manage multiple base currencies by setting the scope to the website level.

Then, specify which currencies you accept, and the currency that you want to use for the display of prices in your store. In the following illustration, the scope of the base currency is set at the website level, so each website can have a different base currency.



Scope of Base Currency

Process Overview:

Step 1: Choose the Accepted Currencies

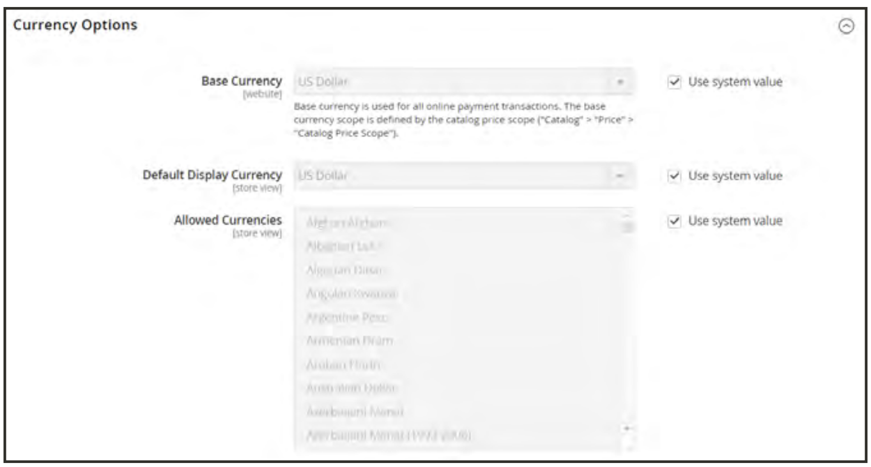
Step 2: Configure the Import Connection

Step 3: Configure the Scheduled Import Settings

Step 4: Update the Currency Rates

Step 1: Choose the Accepted Currencies

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the upper-right corner, set **Store View** to the store view where the cconfiguration applies.
3. In the panel on the left under **General**, choose **Currency Setup**.
4. Expand the **Currency Options** section, and do the following:
   a. Set **Base Currency** to the primary currency that you use for online transactions.
   b. Set **Default Display Currency** to the currency that you use to display pricing in the store view.
   c. In the **Allowed Currencies** list, select all currencies that you accept as payment in the store view. Make sure to also select your primary currency. (For multiple currencies, hold down the Ctrl key and select each option.)



Currency Options

5. When prompted to refresh the cache, tap the **Close** ( )box in the upper-right corner of the system message. We'll refresh the cache later.
6. To define the scope of the base currency, do the following:
   a. In the panel on the left under **Catalog**, choose **Catalog**. Then, scroll down and expand the **Price** section.
   b. Set **Catalog Price Scope** to either "Global" or "Website."

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

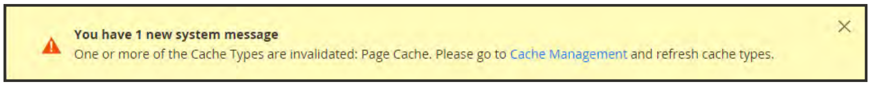
   d. In the **Error Email Recipient** field, enter the email address of the person who is to receive email notification if an error occurs during the import process. To enter multiple email addresses, separate each with a comma.

   e. Set **Error Email Sender** to the store contact that appears as the sender of the error notification.

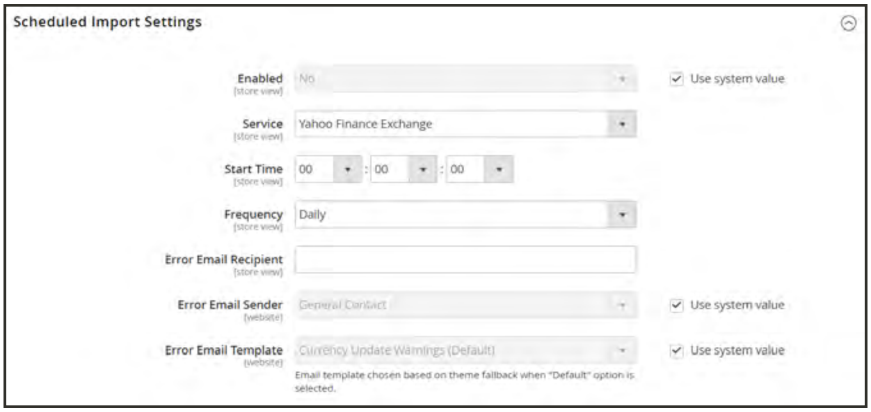
   f. Set **Error Email Template** to the email template used for the error notification.

3. When complete, tap **Save Config**.

4. When prompted to update the cache, tap the **Cache Management** link. Then, refresh the invalid cache.



Refresh Cache



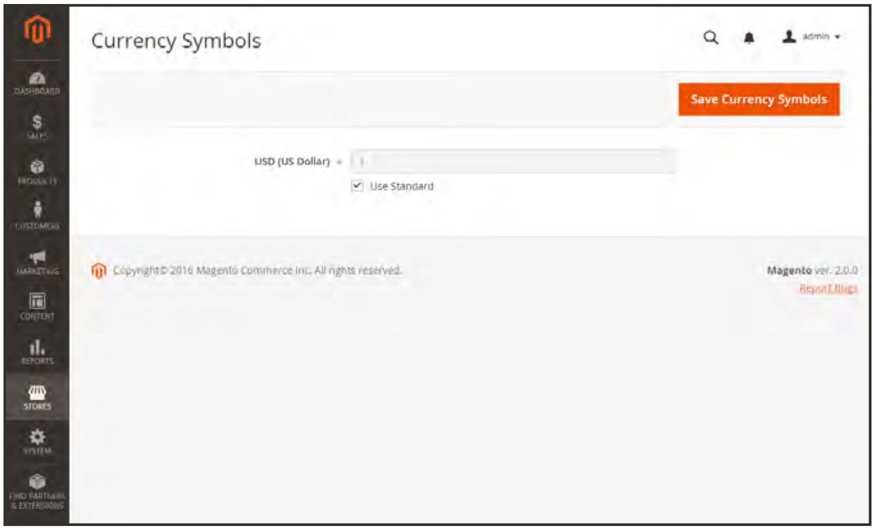
Scheduled Import Settings

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.

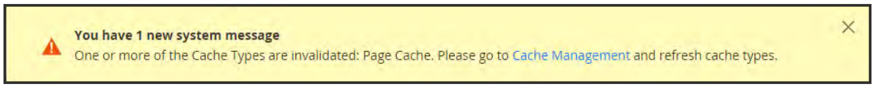
2. Enter a custom symbol for each currency you want to use, or mark the **Use Standard** checkbox to the right of each currency.

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.

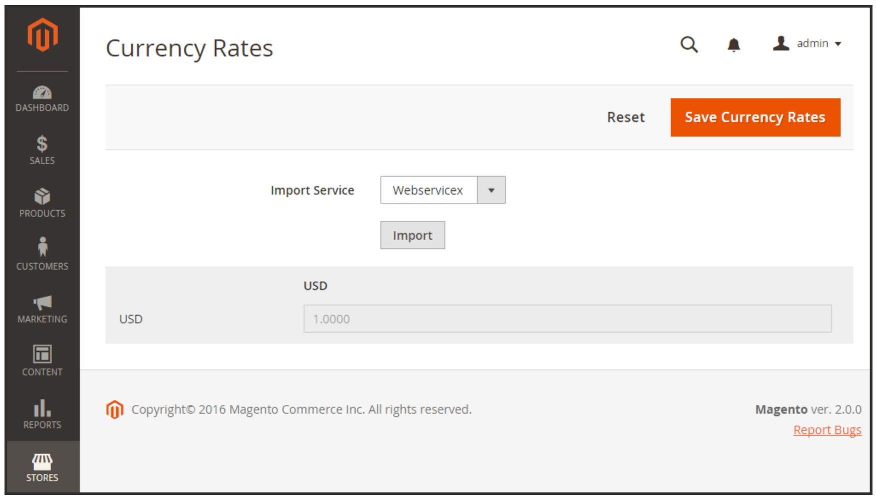


Refresh Cache

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**.

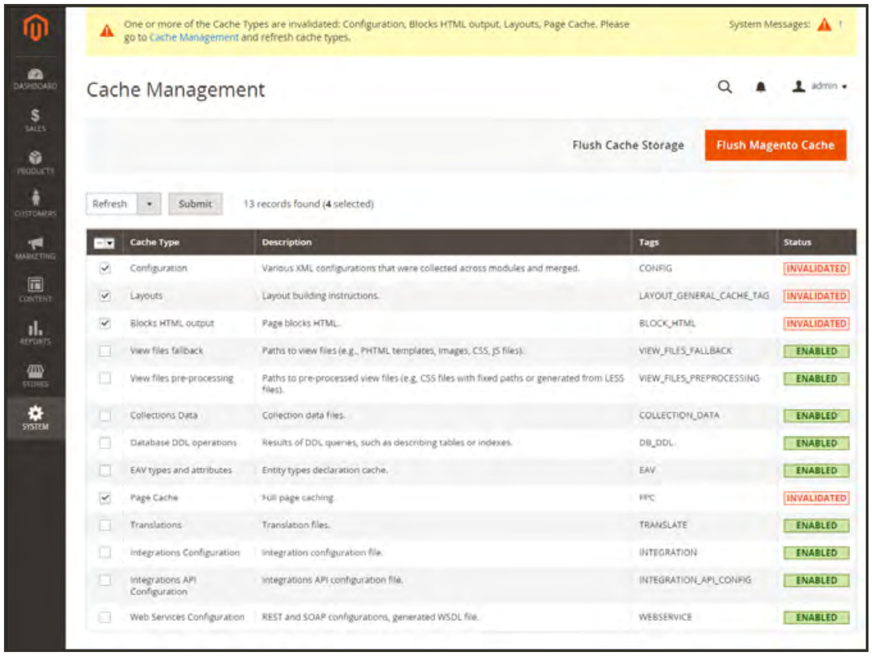
2. Set **Import Service** to the currency rate provider. WebserviceX is the default provider.

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.



Refresh Invalid Caches

To import currency rates on schedule:

1. Make sure that Cron is enabled for your store.
2. Complete the Currency Rate Setup to specify the currencies that you accept, and to establish the import connection and schedule.
3. To verify that the rates are imported on schedule, check the Currency Rates list. Then, wait for the duration of the frequency setting established for the schedule, and check the rates again.

CHAPTER 96:

Attributes

Magento uses attributes to manage the information associated with products, customers, and product ratings. Attributes are pieces of information that might appear as fields in forms, reports, product reviews, layered navigation, and email messages. Some attributes are built into the system, and others can be created to address specific needs.

To learn more about creating and managing product attributes, see:

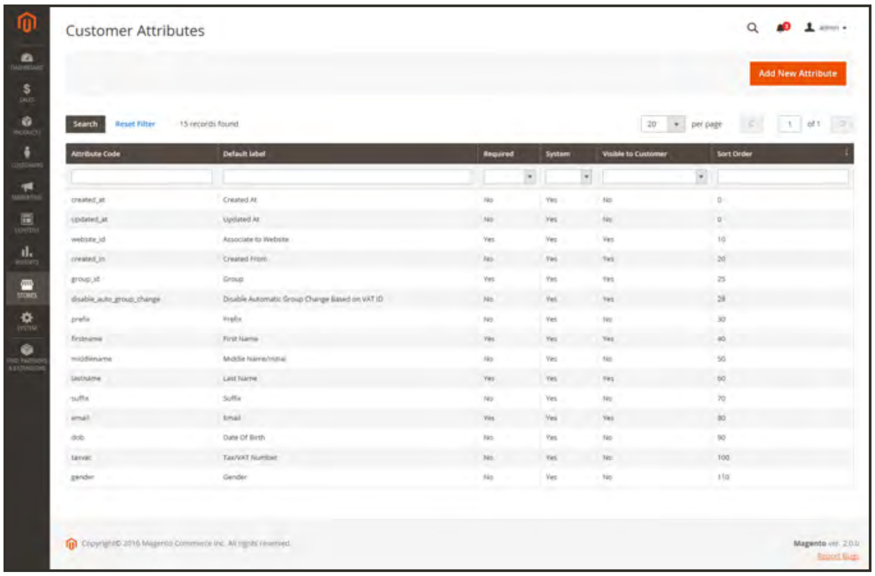
- Product Attributes
- Attribute Sets

To learn more about importing and exporting attributes, see:

- Data Transfer
- Using Product Attributes
- Product Attribute Reference
- Customer Attribute Reference

Customer Attributes

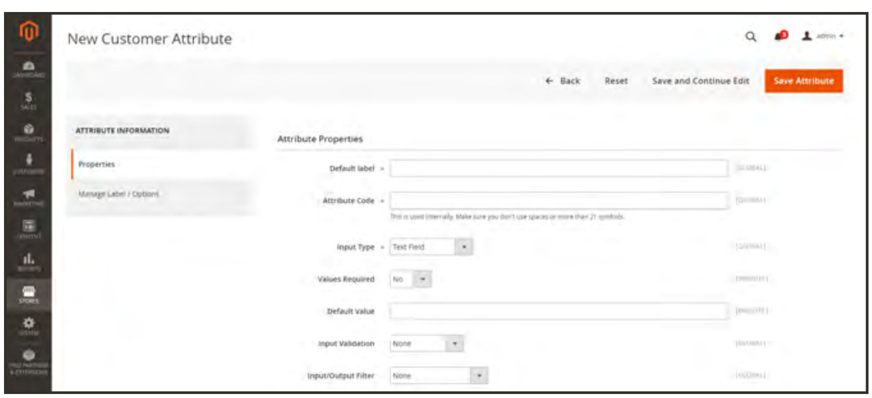
Magento’s customer attributes provide the information required to support the order, fulfillment, and customer management processes. Because your business is unique, you might need fields in addition to those provided by the system. You can add custom attributes to the Account Information, Address Book, 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.

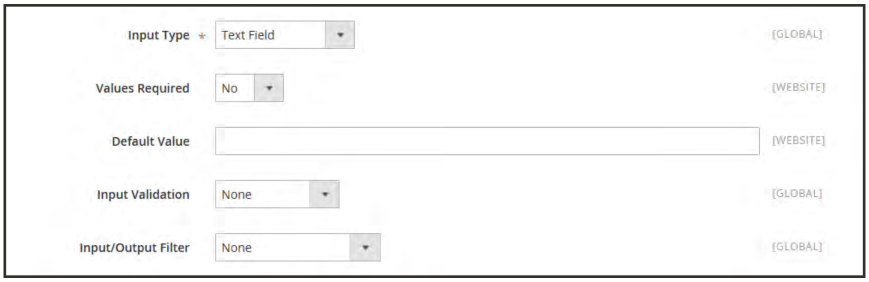
> **Shortcut:** To complete only the required fields at this time, scroll down to Storefront Properties, enter the Sort Order, and save.

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.
`lastname`	The last name of the customer.

Default Customer Attributes (cont.)

ATTRIBUTE CODE	DESCRIPTION
`suffix`	Any suffix that is used with the customer name. (Jr., Sr., Esquire, etc.)
`email`	The customer’s email address.
`dob`	The customer’s date of birth.
`taxvat`	The Value Added Tax (VAT) ID that is assigned to the customer. The default label of this attribute is “VAT Number.”. The VAT number field is always present in all shipping and billing customer addresses when viewed from the Admin, but is not a required field.
`gender`	The customer gender.

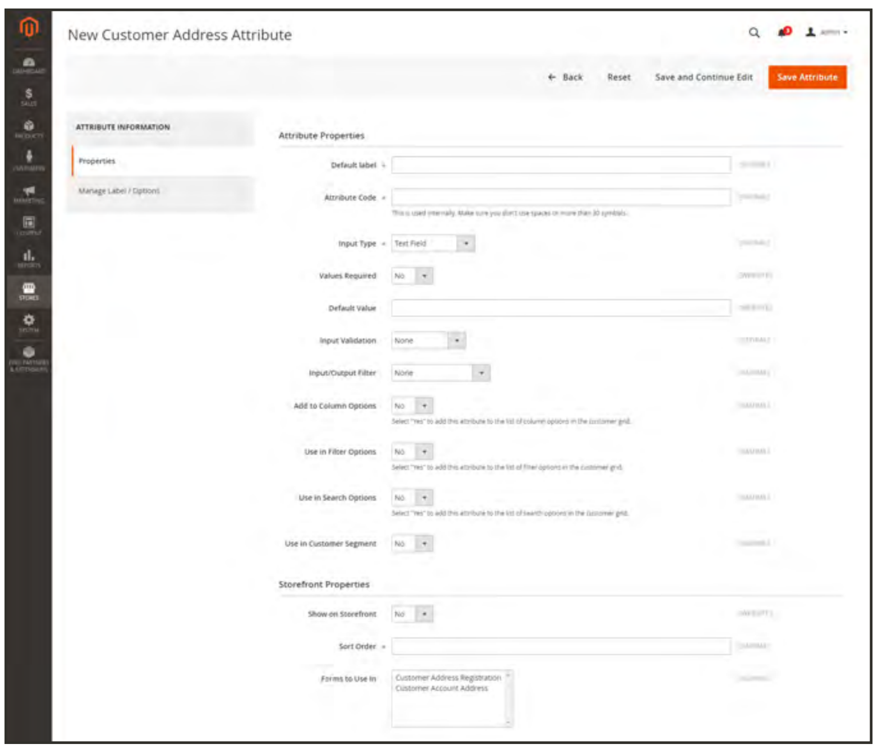
Customer Address Attributes

Custom address attributes can be set up if you need to provide additional information such as an optional email address, Skype account, alternate phone number, building, or county. The custom attribute can then be incorporated into the address template that is used to produce sales documents.The process to create a custom address attribute is almost the same as creating a customer attribute. Customer address attributes can be used in the following forms:

- Customer Registration
- Address Book
- Customer Billing and Shipping Address

To create a new customer address attribute:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Customer Address**.
2. In the upper-right corner, tap **Add New Rating**.
3. Follow the same process as you would to create a customer attribute.



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

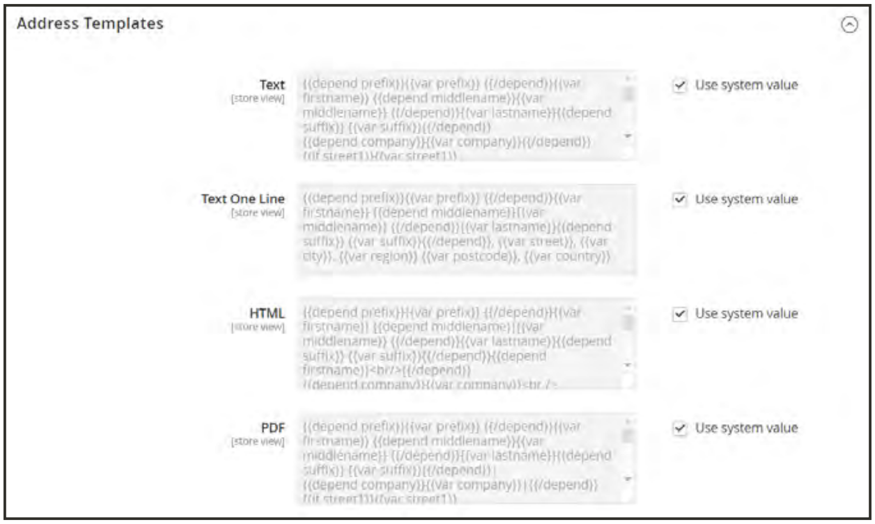
For Text One Line Template

```
{{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:

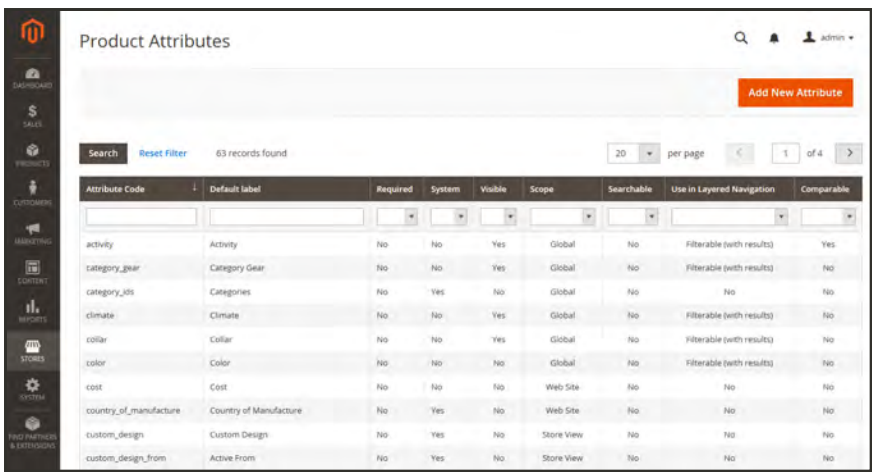
1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left, under Customers, select **Customer Configuration**.
3. Click to expand the **Address Templates** section. The section includes a separate set of formatting instructions for each of the 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, its appearance and behavior in the store, and in data transfer operations. The properties and labels associated with each attribute determine how it can be used, and its presentation in the store.

Properties	The Properties section includes both basic and advanced attribute properties.
Labels	The label identifies an attribute in the Admin and also in the storefront of each store view. If your store is available in multiple languages, you can enter a different translated label for each language.
Storefront Properties	The Storefront Properties determine how an attribute can be used in your store, its appearance, and behavior. You can specify if attributes are available for search, layered navigation, product comparisons, price rules, and sorting. For text attributes, you can enable the WYSIWYG editor, and determine if HTML tags can be used to format the values.

To learn how to use attributes while creating a product, see: Product Attributes.



Product Attributes Page

Properties

Property Descriptions

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 predefined options of “Yes” and “No.”
	Multiple Select	A drop-down list of options that allows multiple selections. To select more than one option, hold down the Ctrl key and click each item.
	Dropdown	A drop-down list of options that allows only one selection.
	Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.
	Media Image	An additional image that can be included in the attribute set of a product.
	Visual Swatch	Displays a swatch that depicts the color, texture, or pattern of a configurable product. A visual swatch can be filled with a hexadecimal color value, or display an uploaded image that represents the color, material, texture, or pattern of the option.

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	Text Swatch — A text-based representation of a configurable product option that is frequently used for size. Text swatches can also include hexadecimal color values. Fixed Product Tax — An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Values Required	To require that a value to be entered in this field before the record can be saved, set Values Required to “Yes.” Options include: Yes / No
ADVANCED ATTRIBUTE PROPERTIES	
Attribute Code	(Required) A unique identifier for internal use. The Attribute Code must begin with a letter, but can include a combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length and cannot include any special characters or spaces, although an underscore (_) 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 Product Attributes. A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.
Unique Value	Requires the attribute value to be different from all other values entered in the same attribute, within the context of the scope setting. Unique value should be enabled for any attribute that is used as an ID number. For example, because SKU is used to identify products throughout the hierarchy, it has a unique value with a global scope. Options: Yes / No
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options:

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	None Decimal Number Integer Number Email URL Letters Letters (a-z, A-Z) or Numbers (0-9)
Add to Column Options	Determines if the column appears in the product grid. Options: Yes / No
Use in Filter Options	Determines if the attribute is used as a filter control at the top of columns in the grid. Options: Yes / No

Storefront Properties

Property Descriptions

PROPERTY	DESCRIPTION
Use in Search	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 10. **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 available to be used as a filter in layered navigation.
	Filterable (with results) Layered navigation includes only those filters for which matching products can be found. Any attribute value that already applies to all products shown in the list does not appear as an available filter. Attribute values with a count of zero (0) product matches are also omitted from the list of available filters. The filtered list of products includes only those that match the filter. The products list is updated only if the selected filter(s) change what is currently shown.
	Filterable (no results) Layered navigation includes filters for all available attribute values and their product counts, including those with zero (0) product matches. If the attribute value is a swatch, the value appears as a filter, but is crossed out.
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

System

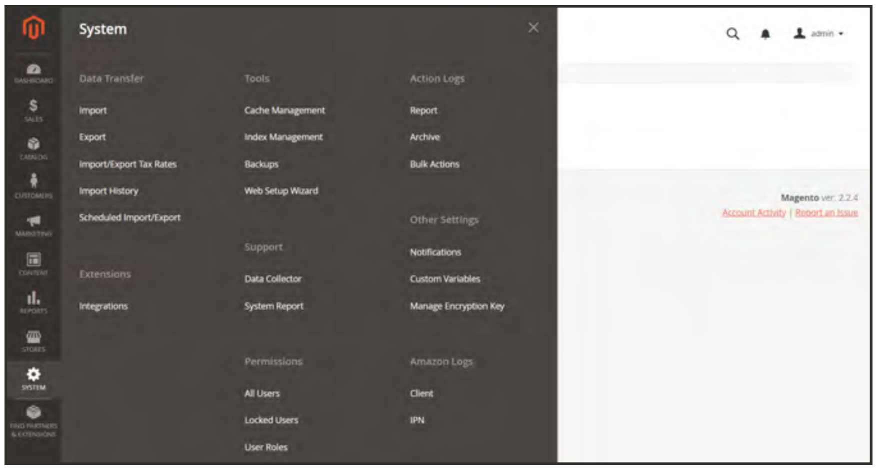
Contents

In this section of the guide, you'll learn how to import and export data, manage security and permissions, install extensions and integrations, and use the many tools that are available to maintain your store at peak performance.

CHAPTER 97:

System Menu

The System Menu includes tools to import and export data, install extensions, manage system caches and indexes, manage permissions, backups, system notifications, and custom variables.

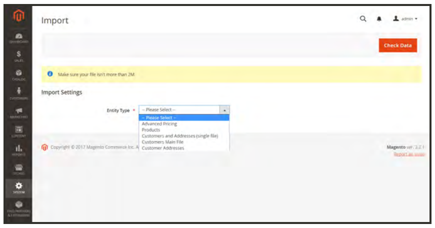


System Menu

To display the System menu:

On the Admin sidebar, tap **System**.

Menu Options

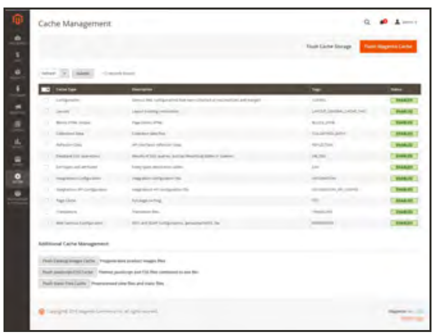


Data Transfer

The Import and Export tools give you the ability to manage multiple records in a single operation. You can import new items, and also update, replace, and delete existing products and tax rates.

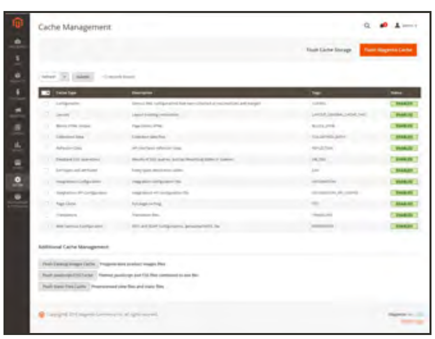
Extensions

Manage integrations and extensions for your store.



Tools

Manage your system resources, including cache and index management, backups, and installation settings.



Support

The Support Tools can be used as a resource during the development and optimization processes, and as a diagnostic tool to help our Support team identify and resolve issues with your system.

Permissions

Magento uses roles and permissions to create different levels of access for Admin users, which gives you the ability to grant permission on a “need to know” basis to people who work on your site.

Action Log

The Action Log tracks the activities of administrators who work in your store. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object that was the target of the action. The Admin Actions archive lists the CSV log files that are stored on the server.

Other Settings

Manage the notifications in your inbox, create custom variables, and generate a new encryption key.

Amazon Logs

Provides access to Client and IPN logs, if enabled in the Develothe per Options section of the Amazon Pay configuration.

CHAPTER 98:

Data Transfer

The Import and Export tools give you the ability to manage multiple records in a single operation. You can not only import new items, but also update, replace, and delete existing sets of products. For example, you can add new products to your inventory, update product data and advanced price data, and replace a set of existing products with new products. If you have a large catalog of products, it’s much easier to export the data, edit the data in a spreadsheet, and import it back into your store.

- Working with CSV Files
- Import
- Export
- Scheduled Import/Export
- Product Attribute Reference
- Customer Attribute Reference

Working with CSV Files

The comma-separated-value (CSV) file format is used as the basis of data transfer operations, and is supported by all spreadsheet and database applications. The following file types are supported for import and export:

Import	CSV and ZIP (a compressed CSV file.)
Export	CSV

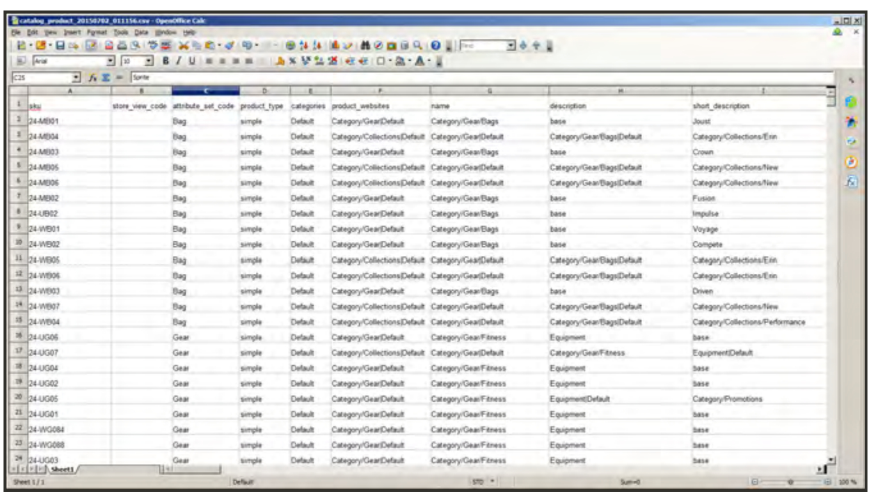
Important! We recommend that you use a program that supports UTF-8 encoding, such as Notepad++ or OpenOffice Calc, to edit CSV files. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento. If you work on the Mac, you can save your data in the CSV (Windows) format.

CSV files have a specific structure that must match the database. Each column heading corresponds to the Attribute Code of the field that is represented by the column. To ensure that the column headings can be read by Magento, first export the data from your store as a CSV file. You can then edit the data and re-import it into Magento.

If you open an exported CSV file in a text editor, you will see that values are separated by commas, and multiple values are enclosed in double-quotes. During import, you can specify a custom separator character, although a comma is the default.

Product CSV Structure

A full export of the product database contains information about each product in the catalog, and the relationships between them. Each record has fixed selection of columns that corresponds to the attributes in the catalog, although the order of the attributes is ignored during the import process.



Exported Product CSV in OpenOffice Calc

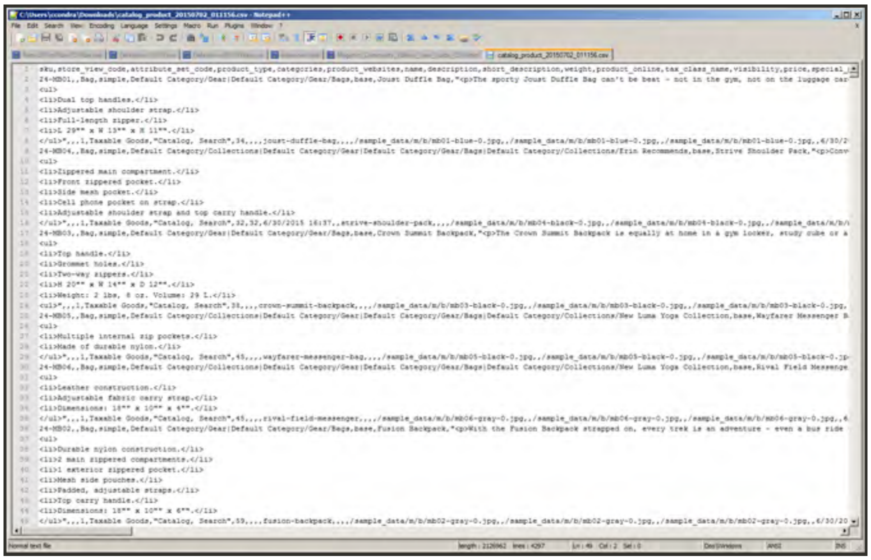
The first row of the table contains the names of each attribute, which are used as column headers. The remaining rows describe the individual product records. Any row that begins with a value in the SKU column is the beginning of a new product record. A single product might include several rows that contain information about multiple images or product options. The next row that has a value in the SKU column begins a new product.

The category column contains a path for each category to which the product is assigned. The path includes the root category, followed by a forward slash (/) between each level. By default, the pipe "|" character is used to separate different category paths. For example:

Default Category/Gear|Default Category/Gear/Bags.

To import data, you need to include only the SKU and any columns with changes. Any blank columns are ignored during the import process. It is not possible to add attributes during the import process. You can include only existing attributes.

For a detailed description of each product attribute, see: Product Attribute Reference.



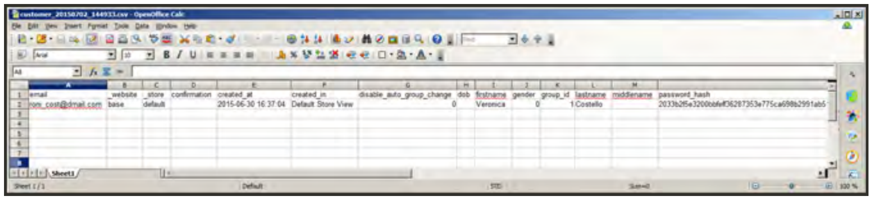
Exported Product CSV in Notepad++

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:

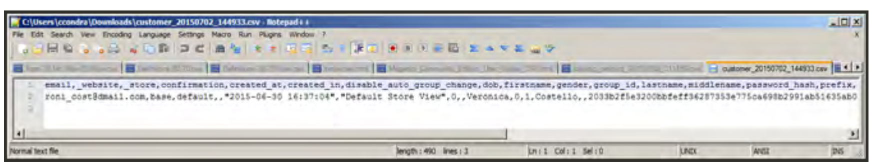


Exported Customer CSV in OpenOffice Calc

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.

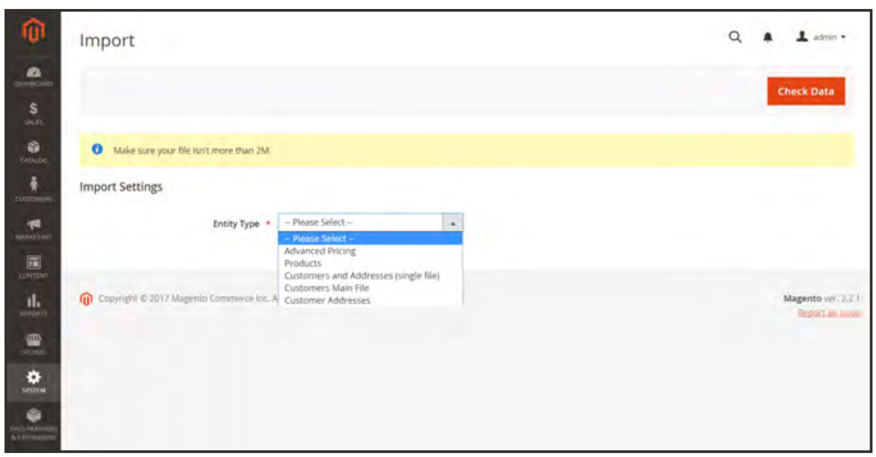
Import

Data for all product types can be imported into the store. In addition, you can import products, advanced pricing data, customer data, customer address data, and product images. Import supports the following operations:

- Add/Update
- Replace
- Delete

The size of the import file is determined by the settings in the `php.ini` file on the server. The system message on the Import page indicates the current size limit.

Special characters — such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols — can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an “escape sequence.” For example, if the data includes a string of text such as code=”str”,code=”str2”, choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.



Import

Process Overview:

Step 1: Prepare the Data

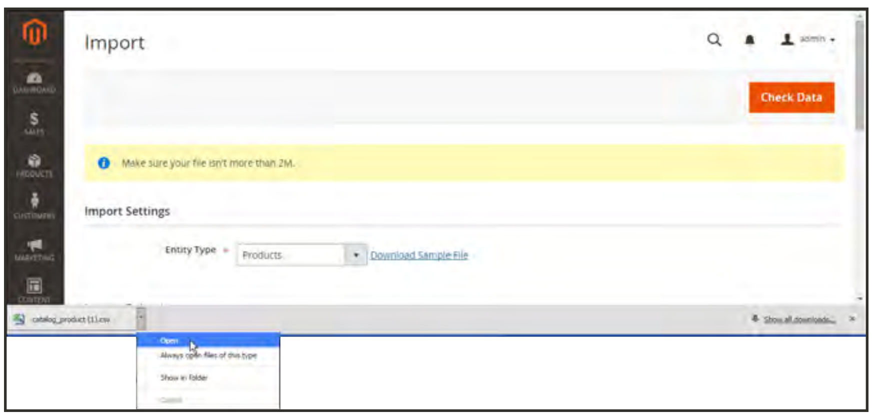
Step 2: Choose the Import Behavior

Step 3: Identify the Import File

Step 4: Check the Import Data

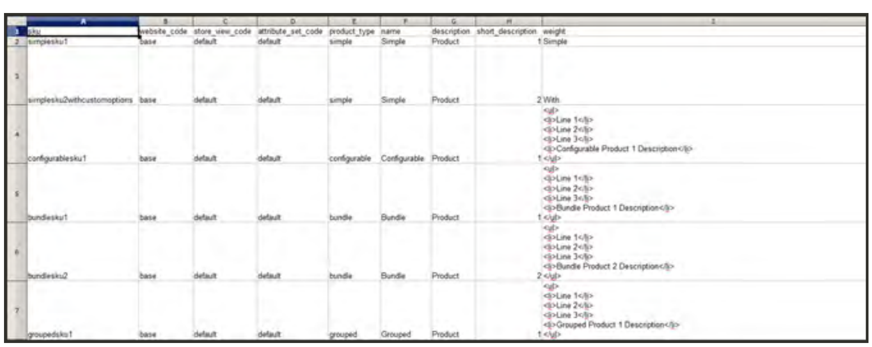
Step 1: Prepare the Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import**.
2. Under **Import Settings**, set **Entity Type** to one of the following:
   - Advanced Pricing
   - Products
   - Customers and Addresses
   - Customers Main File
   - Customer Addresses
3. Tap **Download Sample File**. Then on the download menu in the lower-left corner of your browser window, choose **Open**.



Download Sample File

The sample file includes column headings with placeholder data for example product types.



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
   - Delete

2. To determine what happens when an error is encountered when importing data, choose one of the following:
   - Stop on Error
   - Skip error entries

   Then in the **Allowed Errors Count** field, enter the number of errors that can occur before the import is canceled. The default value is 10.

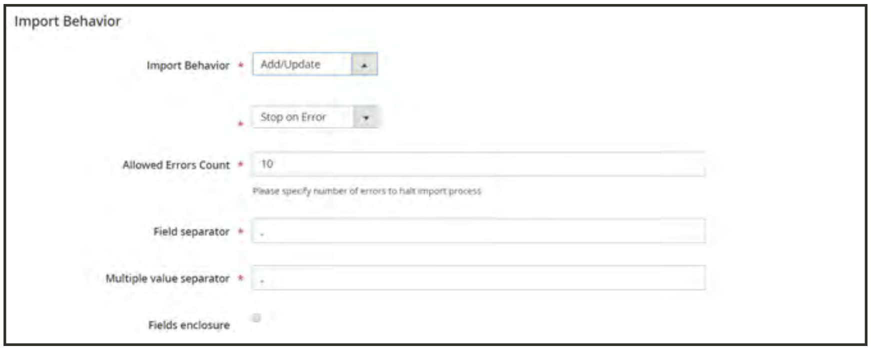
3. Do the following:

   a. Accept the default value of a comma (,) for the **Field separator**.

   b. Accept the default value of a comma (,) for the **Multiple value separator.**

   In a CSV file, a comma is the default separator. To use a different character, make sure that the data in the CSV file matches the character that you specify.

   c. If you want to enclose any special characters that might be found in the data as an "escape sequence," mark the **Fields Enclosure** checkbox.

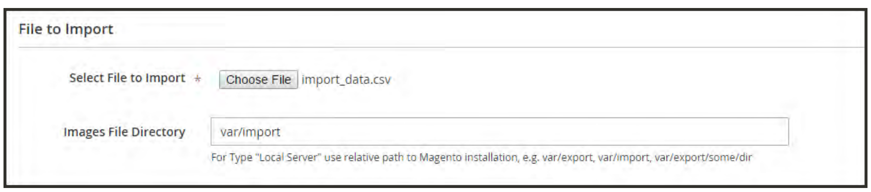


Import Behavior

Step 3: Identify the Import File

1. Tap **Choose File** to select the file to import.
2. Find the CSV file that you prepared to import, and tap **Open**.
3. In the **Images File Directory** field, enter the relative path to the location on the Magento server where uploaded images are stored. For example: `var/import`.

   To learn more about importing product images, see: Importing Product Images.



File to Import

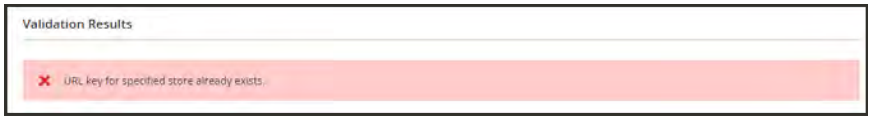
Step 4: Check the Import Data

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.



URL Key Already Exists

A message appears when the import is complete.

Import Behavior

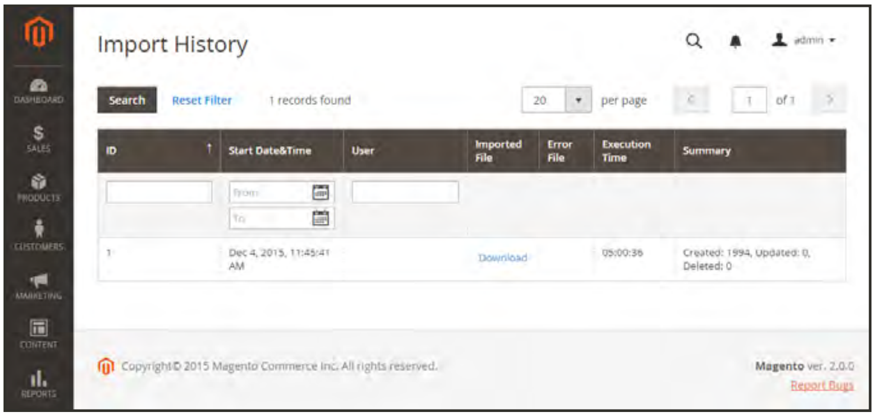
OPERATION	DESCRIPTION
Add/Update	New product data is added to the existing product data for the existing entries in the database. All fields except `sku` can be updated. New tax classes that are specified in the import data are created automatically. New product categories that are specified in the import file are created automatically. New SKUs that are specified in the import file are created automatically
Replace	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	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.

Import History

Maintains a record of data that has been imported into your store, including the start date and time, user, execution time, and a link to the imported file.

To view the import history:

1. On the Admin sidebar, tap **System**.
2. Under **Data Transfer**, choose **Import History**.



Import History

Importing Product Images

Multiple product images of each type can be imported into Magento, and associated with a specific product. The path and file name of each product image is entered in the CSV file, and the image files to be imported are uploaded to the corresponding path on the Magento server or external server.

Magento creates its own directory structure for product images that is organized alphabetically. When you export product data with existing images to a CSV file, you can see the alphabetized path before the file name of each image. However, when you import new images, you don't need to specify a path, because Magento manages the directory structure automatically. Just make sure to enter the relative path to the import directory before the file name of each image to be imported.

To upload images, you must have login credentials and correct permissions to access to the Magento folder on the server. With the correct credentials, you can use any SFTP utility to upload the files from your desktop computer to the server.

Before you try to import a large amount of images, review the steps in the import method that you want to use, and run through the process with a few products. After you understand how it works, you'll feel confident importing large quantities of images.

> **Important!** We recommend that you use a program that supports UTF-8 encoding to edit CSV files, such as Notepad++ or OpenOffice Calc. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento.

Method 1: Import Images from the Local Server

1. On the Magento server, upload the image files to the `pub/media/import` folder. This is the default folder for importing product images.

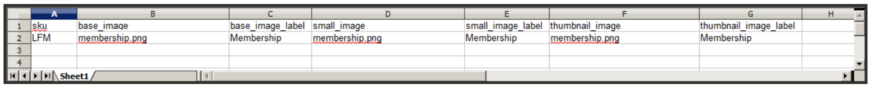
   ```
   [magento installation folder]/pub/media/import
   ```

   You can use a different folder on the Magento server, as long as the path to the folder is specified during the import process.

2. In the CSV data, enter the name of each image file to be imported on the correct row, by `sku`, and in the correct column according to image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_images`).

   > For images in the default import folder(/pub/media/import), do not include the path before the filename in the CSV data.

   The CSV file must include only the `sku` column and the related image columns.



CSV Import Image from Default Location

3. Follow the instructions to import the data.

   After selecting the file to import, enter the relative path following **Images File Directory**:

```
/pub/media/import
```

Images File Directory

   If importing multiple images for a single `sku`, insert a blank row below the `sku`, and enter the additional image file names in the appropriate columns. The additional rows are understood to belong to the parent `sku`.

Method 2: Import Images from External Server

1. Upload the images to be imported to the designated folder on the external server.
2. In the CSV data, enter the full URL for each image file in the correct column by image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_images`).

```
http://example.com/images/image.jpg
```

3. Follow the instructions to import the data.

Import Guidelines

New Entities

- Entities are added with the attribute values specified in the CSV file.
- If there is no value, or there is a non-valid value, for a required attribute with no default value set, then the entity (the corresponding row or rows) cannot be imported.
- If there is no value, or there is a non-valid value, for a required attribute with the default value set, then the entity (the corresponding row or rows) is imported, and the default value is set for the attribute.
- If the complex data is not valid, then the entity (the corresponding row or rows) cannot be imported.

Existing Entities

- For attributes that are not complex data, the values from the import file, including the empty values for the non-required attributes, replace the existing values.
- If there is no value, or there is a non-valid value, for a required attribute, then the existing value is not replaced.
- If the complex data for the entity is invalid, the entity (the corresponding row or rows) cannot be imported, except the case, when Delete Entities was selected in the Import Behavior drop-down menu.

Complex Data

If an attribute that is specified in the import file already exists, and its value is derived from a defined set of values, the following applies:

- If the value is not already included in the defined set of values, the row can be imported and a default value, if defined, is set for the attribute.
- If the value is already included in the defined set, the corresponding row cannot be imported.

If an attribute name is specified in the import file but is not yet defined in the system, it is not created, and its values are not imported.

Invalid Files

- A file cannot be imported if all rows are invalid.
- A non-existing service data or complex data name is specified in the import file, such as a column with a `_<non-existing name>` heading.

Export

The best way to become familiar with the structure of your database is to export the data and open it in a spreadsheet. Once you become familiar with the process, you'll find that it is an efficient way to manage large amounts of information.

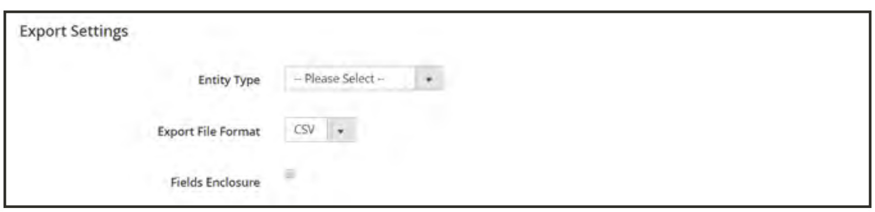
Special characters — such as the equal sign, greater and less than symbols, single and double quotes, backslash, pipe, and ampersand symbols — can cause problems during data transfer. To ensure that such special characters are correctly interpreted, they can be marked as an "escape sequence." For example, if the data includes a string of text such as code="str",code="str2", choosing to enclose the text in double quotes ensures that the original double quotes are understood to be part of the data. When the system encounters a double set of double quotes, it understands that the outer set of double quotes is enclosing the actual data.

To export data:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Export**.
2. In the **Export Settings** section, specify the following:
   a. Set **Entity Type** to one of the following:
      - Products
      - Customers Main File
      - Customer Addresses

   b. Accept the default **Export File Format** of "CSV."

   c. If you want to enclose any special characters that might be found in the data as an "escape sequence," mark the **Fields Enclosure** checkbox.



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.

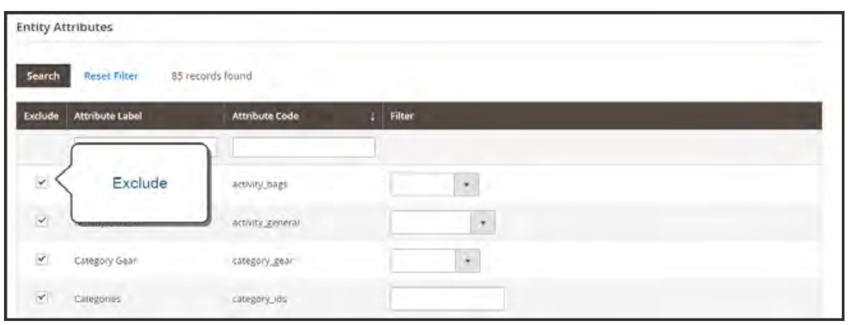
Filtered Entity Attributes

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.



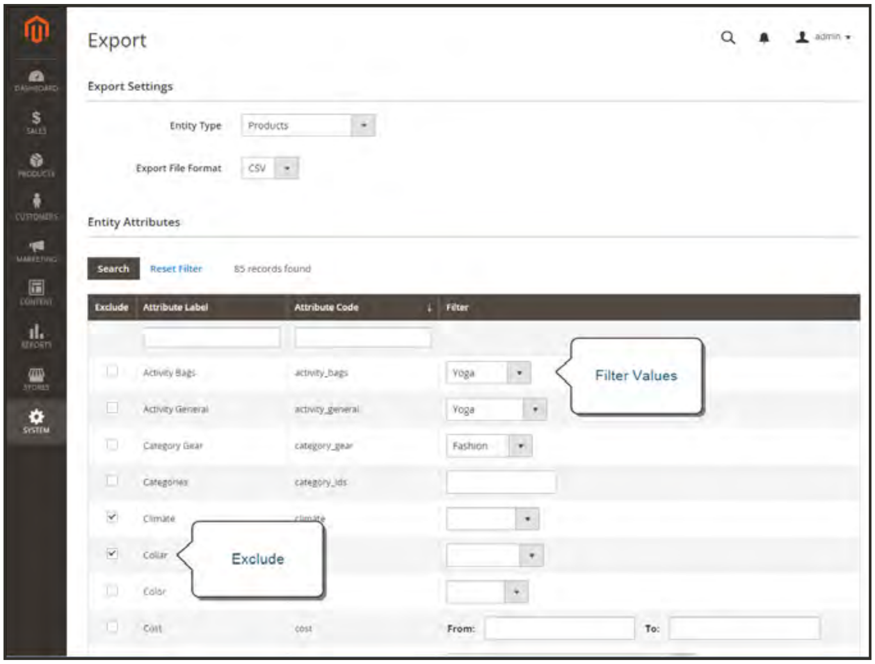
Exclude Attributes

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.

Data Transfer Examples

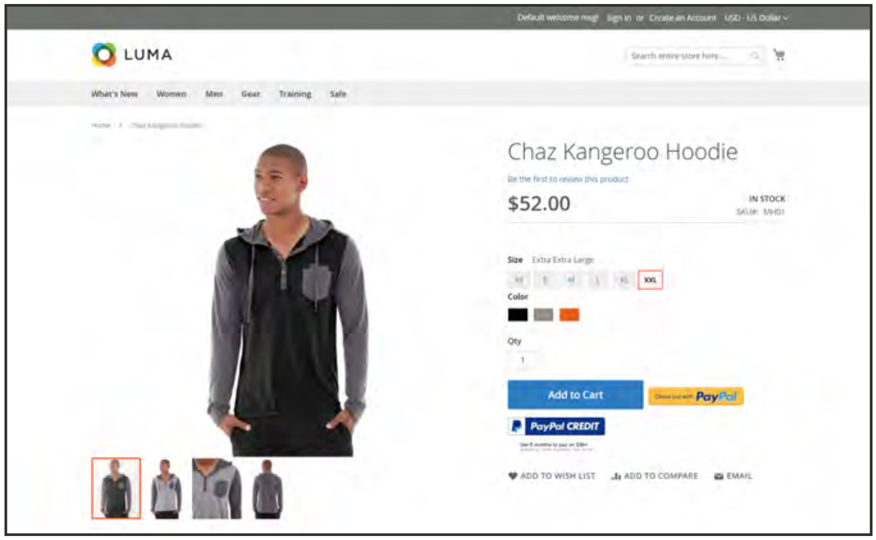
This section of the guide contains examples that show how to import and export catalog data for specific product types and scenarios.

- Configurable Products
- Tier Prices

Importing Configurable Products

The best way to understand how configurable product data is structured, is to export a configurable product and its variations, and examine the data in a spreadsheet.

In the following example, you will add a set of product variations for a new size in each color. First, you will export the configurable product, and examine the data structure. Then, you will update the data and import it back into the catalog. If you don't want to go through the exercise of exporting the data, you can download the CSV file that is used in the example.



New Size Variation Added for Each Color

Step 1: Verify Attribute Settings and Values

1. Before you begin, make sure that the attributes that are used for product variations have the required property settings.

Scope	Global
Catalog Input Type for Store Owner	The input type of any attribute that is used for a product variation must be one of the following: Dropdown Visual Swatch Text Swatch Multi-Select.
Values Required	Yes

2. If you are adding a new size or color, or making any other change to an existing attribute, make sure to update the attribute with the new value.

   a. On the Admin sidebar choose **Stores**. Then under **Attributes**, choose **Product**.

   b. Find the attribute in the list, and open in edit mode.

   c. Add the new value to the attribute. In the following example, a new size is added to a Text Swatch.

Add New Value

3. When complete, tap **Save Attribute**.

4. If you are adding a new attribute, follow the instructions to create the attribute before you begin.

Step 2: Export the Configurable Product

1. On the Admin sidebar, choose **Catalog**. Then, tap **Products**, and do the following:

   a. Tap **Filters**. Then, set **Type** to “Configurable Product, and tap **Apply Filters**.

   b. Choose the configurable product that you want to use for your test export, and take note of the **SKU**.

2. On the Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Export**.

3. Under **Export Settings**, do the following:

   a. Set **Entity Type** to “Products”.

   b. Set **Export File Format** to “CSV”.

Export Settings

4. Under **Entity Attributes**, scroll down to **SKU**. Then, do the following:

   a. Enter the **SKU** of the configurable product that you have chosen to export, and tap **Continue**.

SKU

   b. When the export file appears at the bottom of the window, click **Open**.

   When opened in a spreadsheet, the CSV file has a separate row for each simple product variation, and one row for the configurable product. The `product_type column` shows multiple simple product variations that are associated with one configurable product.

	A	B	C	D	E	F	G
1	sku	store_view_code	attribute_set_code	product_type	categories	product_websites	name
2	MH01-XS-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Black
3	MH01-XS-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Gray
4	MH01-XS-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Orange
5	MH01-S-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Black
6	MH01-S-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Gray
7	MH01-S-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Orange
8	MH01-M-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Black
9	MH01-M-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Gray
10	MH01-M-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Orange
11	MH01-L-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Black
12	MH01-L-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Gray
13	MH01-L-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Orange
14	MH01-XL-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Black
15	MH01-XL-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Gray
16	MH01-XL-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Orange
17	MH01		Top	configurable	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie

Configurable Product with Variations

c. Scroll to the far right of the worksheet to find the following columns. In this example, the data can be found in columns CG and CH.

`configurable_variations`

Defines the one-to-many relationship between the configurable product record and each variation.

`configurable_variation_labels`

Defines the label that identifies each variation.

Depending on the number of variations, the string of data in the `configurable_variations` column can be quite long. The data is used an an index to the associated product variations, and has the following structure:

Data Format

```
sku={{SKU_VALUE}},attribute1={{VALUE}},attribute2={{VALUE}}| sku={{SKU_
VALUE}},attribute1={{VALUE}},attribute2={{VALUE}}
```

Each sku is separated by a pipe symbol (|), and attributes are separated by a comma. The value of each attribute is represented by the attribute code, rather than the attribute label. Here's how the actual data appears:

Example Data

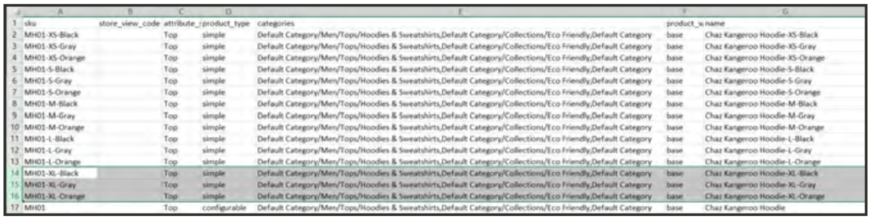
```
sku=MH01-XS-Black,size=XS,color=Black|sku=MH01-XS-
Gray,size=XS,color=Gray|sku=MH01-XS-Orange,size=XS,color=Orange
```

5. When you understand the structure of configurable product data, you can edit the data, or add new variations directly to the CSV file. To learn more, see: Complex Data.

Step 3: Edit the Data

In the following example, the set of XL sizes is copied and pasted into the worksheet to create a new set of product variations for a new size in each color.

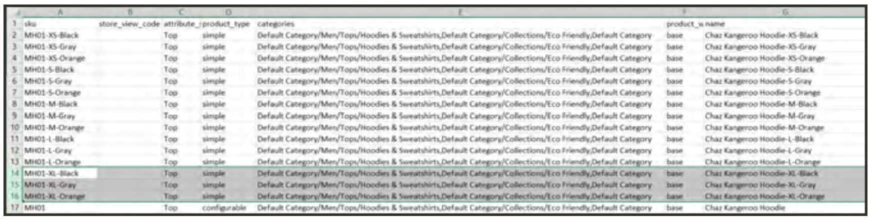
1. Copy the set of product variations that you want to use as a template for the new products.



	A	B	C	D	E	F	G
1	sku	store_view_code	attribute_	product_type	categories	product_w	name
2	MH01-XS-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Black
3	MH01-XS-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Gray
4	MH01-XS-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Orange
5	MH01-S-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Black
6	MH01-S-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Gray
7	MH01-S-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Orange
8	MH01-M-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Black
9	MH01-M-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Gray
10	MH01-M-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Orange
11	MH01-L-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Black
12	MH01-L-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Gray
13	MH01-L-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Orange
14	MH01-XL-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Black
15	MH01-XL-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Gray
16	MH01-XL-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Orange
17	MH01		Top	configurable	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie

Copy Product Variations

2. Insert the copied rows records into the worksheet. You now have two identical sets of the simple product variations.



	A	B	C	D	E	F	G
1	sku	store_view_code	attribute_	product_type	categories	product_w	name
2	MH01-XS-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Black
3	MH01-XS-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Gray
4	MH01-XS-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XS-Orange
5	MH01-S-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Black
6	MH01-S-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Gray
7	MH01-S-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-S-Orange
8	MH01-M-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Black
9	MH01-M-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Gray
10	MH01-M-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-M-Orange
11	MH01-L-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Black
12	MH01-L-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Gray
13	MH01-L-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-L-Orange
14	MH01-XL-Black		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Black
15	MH01-XL-Gray		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Gray
16	MH01-XL-Orange		Top	simple	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie-XL-Orange
17	MH01		Top	configurable	Default Category/Men/Tops/Hoodies & Sweatshirts,Default Category/Collections/Eco Friendly,Default Category	base	Chaz Kangeroo Hoodie

Paste New Product Variations into CSV File

3. Update the data in the following columns of the new variations, as needed. For this example, all the "XL" references are changed to "XXL".

   - `sku`
   - `name`
   - `url_key`
   - `additional_attributes`

4. The next step is to update the information in the `product_variations` column of the configurable product record, so the new variations are included as part of the configurable product.

   a. On the row with the configurable product record, click the cell that contains the `product_variations` data. Then in the formula bar, copy the last set of parameters, beginning with the pipe symbol.

product_variations

   b. Paste the parameters to the end of the data. Then, edit as needed for the new variations. In this example, the `sku` and `size` parameters are updated for the new "XXL" size.

5. Before the data is imported back into the catalog, delete any rows that have not changed.

In this example. only the three new variations for the new size, and the row with the updated configurable product are imported back into the catalog. The other rows can be deleted from the CSV file. However, make sure not to delete the header row with column labels.

Data Ready to Import

6. **Save** the CSV file.The data is ready to import into the catalog.

> The size of an import file cannot be larger than 2 megabytes.

Step 4: Import the Updated Data

1. On the Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Import**.
2. Under **Import Settings**, set **Entity Type** to "Products".

Import Settings

3. Under **Import Behavior**, set **Import Behavior** to "Add/Update".

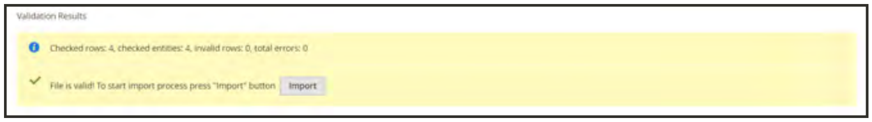
Import Behavior

4. Under **File to Import**, tap **Choose File**. Then, navigate to the CSV file that you prepared for import and choose the file.

File to Import

5. In the upper-right corner tap **Check Data**.

6. If the file is valid, tap **Import**. Otherwise, correct any problems found in the data and try again.



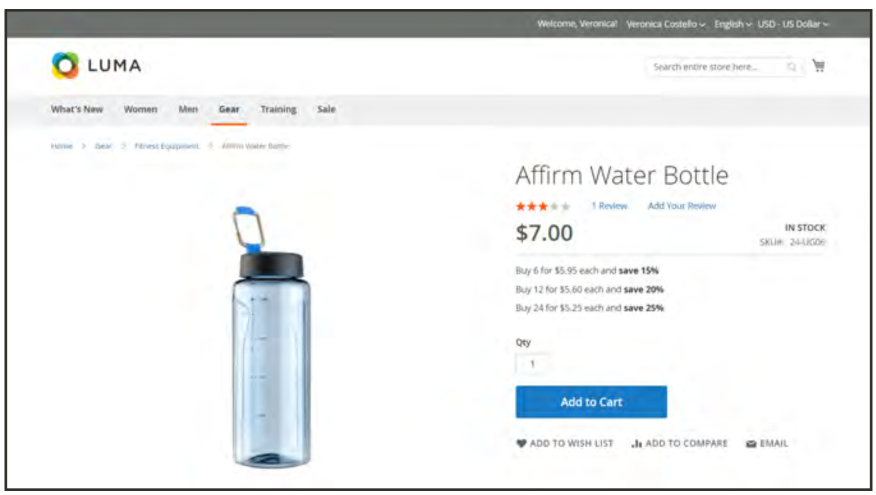
Validation Results

7. When the import is complete, click the **Cache Management** link in the message at the top of the page. Then, refresh all invalid caches.

   The new product variations are now available in the catalog from the Admin and in the storefront. In this example, the hoodie is now available in size XXL for all colors.

Importing Tier Prices

Rather than entering tier prices manually for each product, it can be more efficient to import the pricing data. Before you begin, create a sample file of exported tier price data that you can use as a template.



Tier Pricing

Step 1: Export the Tier Price Data

The following example exports tier pricing data for a single product. Then, you can use the exported data as a template for bulk imports of tier price data. To learn more about exporting advanced pricing data, see: Advanced Pricing Data.

Tier Pricing

1. On Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Export**.
2. Under **Export Settings**, set **Entity Type** to "Advanced Pricing."

3. In the **Entity Attributes** grid, scroll down to the SKU attributes. Then, do the following:

   a. For tier prices that are based on a discount percentage. enter the SKU of each product to be exported, separated by a comma.

SKU(s) to Export

   a. For tier prices that are based on a fixed amount. enter the SKU of each product.

4. Scroll down and tap **Continue**.

5. Look in the lower-left corner of your browser window for the export file. Then, open the file.

Exported Tier Price Data

The following columns are included in the exported data:

- `sku`
- `tier_price_website`
- `tier_price_customer_group`
- `tier_price_qty`
- `tier_price`
- `tier_price_value_type`

You will use the exported data as a template for importing tier price data.

Step 2: Update the Data

1. Update the tier price data for each product, as needed.

2. Any products without tier price updates can be deleted from the CSV file. There is no need to reimport products that haven't changed.

3. **Save** the updated CSV file.

> The size of an import file cannot be larger than 2 megabytes.

Step 3: Import the Updated Data

1. On Admin sidebar, choose **System**. Then under **Data Transfer**, choose **Import**.

2. Under **Import Settings**, set **Entity Type** to "Advanced Pricing." Then, set **Import Behavior** to "Add/Update".

3. Under **File to Import**, tap **Choose File**. Then, select the file that you prepared to import from your directory.

4. In the upper-right corner, tap **Check Data**.

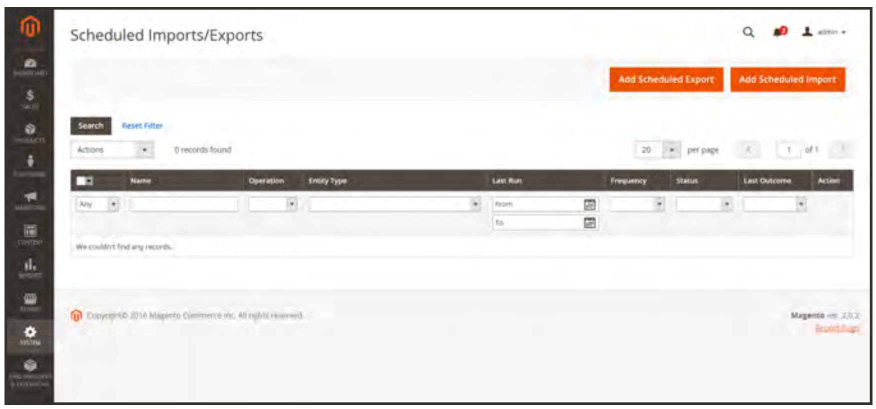
5. If the file is valid, tap **Import**. Otherwise, correct each problem with the data that is listed in the message, and try to import the file again.

Scheduled Import/Export

Scheduled imports and exports can be run on a daily, weekly or monthly basis. The files to be imported or exported can be located on local Magento servers, or on remote FTP servers. Scheduled Import/Export is implemented by default, and does not require additional configuration. All scheduled imports and exports are managed by the Cron job scheduler.

To access scheduled import/export:

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Scheduled Imports/Exports**.



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.

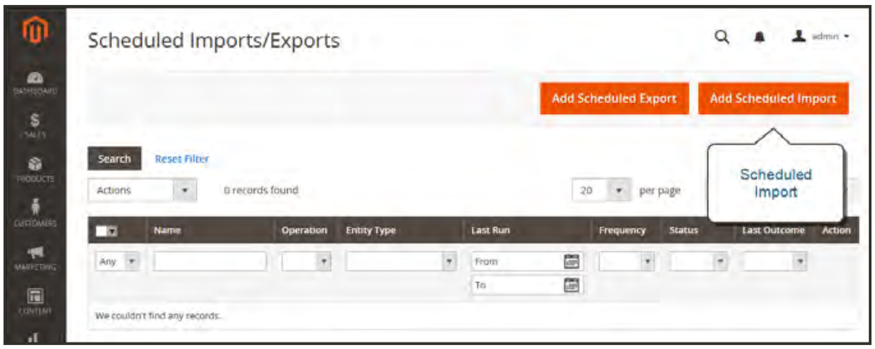
   The details of each operation are not written to the log. If an error occurs, notification is sent of the failed import/export job, with a description of the error.

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

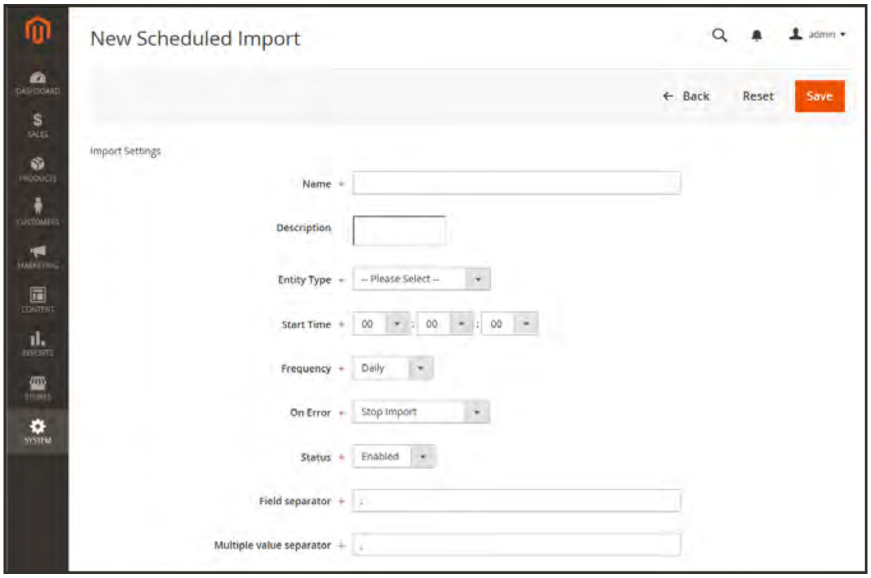
Step 3: Configure the Import Failed Emails

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.”

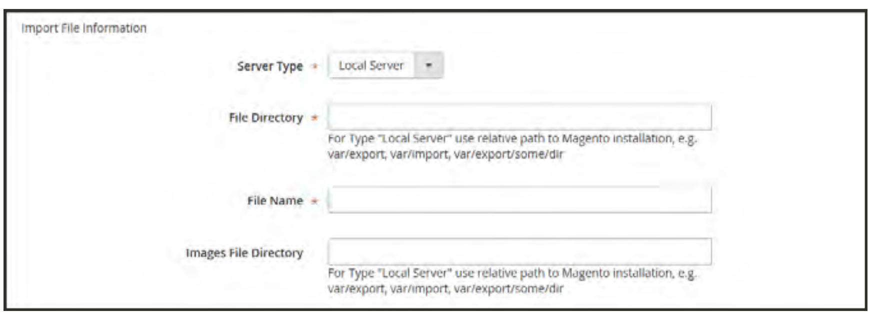


Import Settings

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.

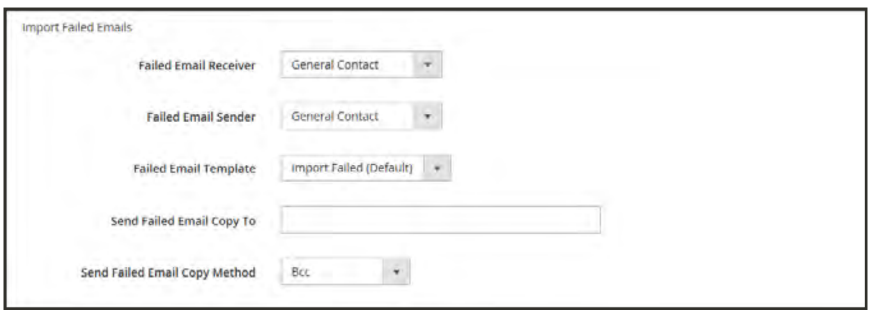
2. Set **Failed Email Sender** to the store contact that appears as the sender of the notification.

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.
Status	The import is enabled by default. You can suspend it by setting the Status to Disabled.
Field Separator	Determines the character that is used to separate fields. Default value: , (comma)

Field Descriptions (cont.)

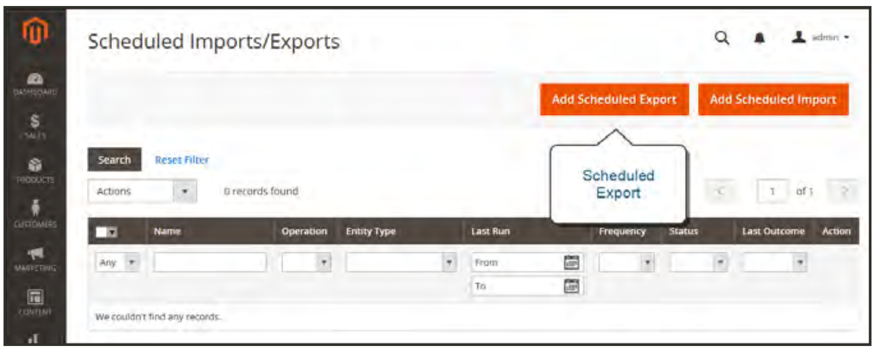
FIELD	DESCRIPTION
Multiple Value Separator	Determines the character that is used to separate multiple values within a field. Default value: , (comma)
IMPORT FILE INFORMATION	
Server Type	You can import from a file located on the same server where Magento is deployed (select Local Server) or from the remote FTP server (select Remote FTP). If you select Remote FTP, additional options for credentials and file transfer settings appear.
File Directory	Specify the directory where the import file is located. If Server Type is set to Local Server, specify the path relative to the Magento installation directory. For example, var/import.
File Name	Specify the name of the import file.
Images File Directory	Enter the path to the directory where product images are stored. For a local server, enter a relative path. For example: `var/import`
IMPORT FAILED EMAILS	
Failed Email Receiver	Specify the email address to which an email notification (failed import email) is sent if the import fails.
Failed Email Sender	Specify the email address that is used as the sender for the import failed email.
Failed Email Template	Select a template for the import failed email. By default, only the Import Failed (Default Template from Locale option is available. Custom templates can be created under System > Transactional Emails.
Send Failed Email Copy To	The email address to which a copy of import failed email is sent.
Send Failed Email Copy Method	Select the copy sending method for the import failed email.

Scheduling an Export

Scheduled Export is similar to manual Export, with respect to the available export file format and types of entities that can be exported:

- You can export to .CSV format
- You can export product and customer data

The advantage of using Scheduled Export is that you can export data multiple times automatically, after specifying the export parameters, and schedule only once



Add Scheduled Export

The details of each export are not written to a log, but in case of failure you will receive an Export Failed email, which contains the error description. The result of the last export job appears in the Last Outcome column on the Scheduled Import/Export page.

After each export, the export file is placed in the user-defined location, and a copy of the file is placed in the `var/log/import_export`directory on the server where Magento is deployed. The timestamp and the marker of the exported entity (products or customers) and type of the operation (in this case, export) are added to the export file name.

Process Overview

Step 1: Complete the Export Settings

Step 2: Complete the Export File Information

Step 3: Configure the Export Failed Emails

Step 4: Choose the Entity Attributes

Step 1: Complete the Export Settings

1. On the Admin sidebar, tap **System**. Then under **Data Transfer,** choose **Scheduled Import/Export**.

2. In the upper-right corner, tap **Add Scheduled Export**. Then, do the following:

   a. Enter a **Name** for the scheduled export.

   b. Enter a brief **Description** that explains the purpose of the export, and how it is to be used.

   c. Set **Entity Type** to one of the following:

      - Products
      - Customers

      The Entity Attributes section at the bottom of the page is updated to reflect the selected Entity Type.

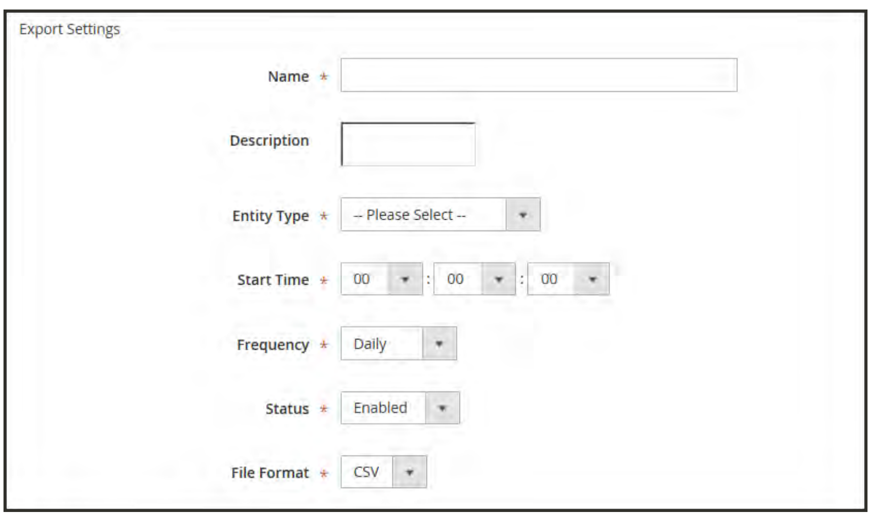
   d. Set **Start Time** to the hour, minute, and second that the export is scheduled to begin.

   e. Set **Frequency** to one of the following:

      - Daily
      - Weekly
      - Monthly

   f. To activate the scheduled export, set **Status** to "Enabled."

   g. Accept "CSV" as the default **File Format**.



Export Settings

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.

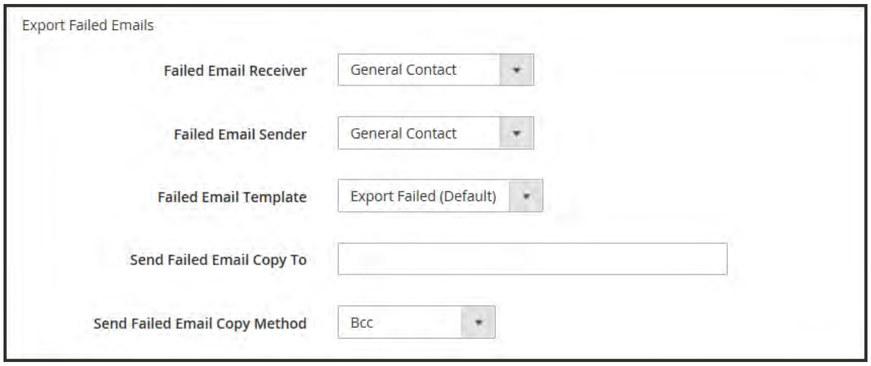
Export File Information

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.

Field Descriptions (cont.)

FIELD	DESCRIPTION
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	
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. You can export a product from your catalog, to see how each attribute is represented in the data.

The installation used to export this data has the sample data installed, and has two websites and several store views. Although this list includes all columns that are typically exported, the `sku` is the only required value. To import data, you can include only the columns with changes. The `sku` should be the first column, but the order of the rest of the attributes doesn't matter.

Simple Product CSV File Structure

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: `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.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
`short_description`	The use of the short product description depends on the theme. It might appear in product listings and is sometimes used in RSS feed listings sent to shopping sites.
`weight`	The weight of the individual product. The actual product weight is determined by the carrier at the time of shipment.
`product_online`	Determines if the product is available for sale in the store. Values: 1 — (Yes) The product is enabled, and available for sale. 2 — (No) The product is disabled, and is not available for sale.
`tax_class_name`	The name of the tax class that is associated with this product.
`visibility`	Determines if the product is visible in the catalog, and made available for search. Values: Not Visible Individually — The product is not included in product listings, although it might be available as a variation of another product. Catalog — The product appears in all catalog listings. Search — The product is available for search operations. Catalog, Search — The product is included in catalog listings and is also available for search.
`price`	The price that the product is offered for sale in your store.
`special_price`	The discounted price of the product during the specified date range.
`special_price_from_date`	The beginning date of the time period when the special price is in effect.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
`special_price_to_date`	The last date of the time period when the special price is in effect.
`url_key`	The part of the URL that identifies the product. The default value is based on the product name. For example: product-name
`meta_title`	The meta title appears in the title bar and tab of the browser and search results lists. The meta title should be unique to the product, incorporate high-value keywords, and be less than 70 characters in length.
`meta_keywords`	Meta keywords are visible only to search engines, and are ignored by some search engines. Choose high-value keywords, separated by a comma. For example: keyword1,keyword2,keyword3.
`meta_description`	Meta descriptions provide a brief overview of the product for search results listings. Ideally, a meta description should be between 150-160 characters in length, although the field accepts up to 255 characters.
`base_image`	The relative path for the main image on the product page. Magento stores files internally in an alphabetical folder structure.You can see the exact location of each image in the exported data. For example: /sample_data/m/b/mb01-blue-0.jpg To upload a new image or write over an existing image, enter the file name, preceded by a forward slash. For example: /image.jpg
`base_image_label`	The label that is associated with the base image.
`small_image`	The file name of the small image that is used on catalog pages, preceded by a forward slash. For example: /image.jpg
`small_image_label`	The label associated with the small image. For example: Small Image 1, Small Image 2
`thumbnail_image`	The file names of any thumbnail image to appear in the gallery on the product page, preceded by a forward slash. For example: /image.jpg

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
`thumbnail_image_label`	The label associated with any thumbnail images. For example: Thumbnail 1, Thumbnail 2
`created_at`	Indicates the date when the product was created. The date is automatically generated when the product is created, but can be edited later.
`updated_at`	Indicates the date when the product was last updated.
`new_from_date`	Specifies the “from” date for new product listings, and determines if the product is featured as a new product.
`new_to_date`	Specifies the “to” date for new product listings, and determines if the product is featured as a new product.
`display_product_options_in`	If the product has multiple options, determines where they appear on the product page. Values: Product Info Column Block after Info Column
`map_price`	The minimum advertised price of the product. (Appears only if MAP is enabled.)
`msrp_price`	The manufacturer’s suggested retail price for the product. (Appears only if MAP is enabled.)
`map_enabled`	Determines if Minimum Advertised Price is enabled in the configuration. Values: 1 (Yes) MAP is enabled. 0 (or blank) (No) MAP is not enabled.
`gift_message_available`	Determines if a gift message can be included with the product purchase. Values: 1 (Yes) The option to include a gift message is presented to the customer. 0 (or blank) (No) The option to include a gift message is not presented to the customer.
`custom_design`	Lists the available themes that can be applied to the product page.

Simple Product CSV File Structure (cont.)

<table>
<tr><th>ATTRIBUTE</th><th colspan="2">DESCRIPTION</th></tr>
<tr><td>custom_design_from</td><td colspan="2">Specifies the beginning date when the selected theme is applied to the product page.</td></tr>
<tr><td>custom_design_to</td><td colspan="2">Specifies the end date when the selected theme is applied to the product page.</td></tr>
<tr><td>custom_layout_update</td><td colspan="2">Additional XML code that is applied as a layout update to the product page.</td></tr>
<tr><td rowspan="8">page_layout</td><td colspan="2">Determines the page layout of the product page. Values:</td></tr>
<tr><td>No layout updates</td><td>No change is made to the page layout.</td></tr>
<tr><td>1 column</td><td>Applies a one- column layout to the product page.</td></tr>
<tr><td>2 columns with left bar</td><td>Applies a two-column layout with a left sidebar to the product page.</td></tr>
<tr><td>2 columns with right bar</td><td>Applies a two-column layout with a right sidebar to the product page.</td></tr>
<tr><td>3 columns</td><td>Applies a three-column layout to the product page.</td></tr>
<tr><td>empty</td><td>Applies a blank layout to the product page.</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td>product_options_container</td><td colspan="2">If the product has multiple options, determines where they appear on the product page. Values:
Product Info Column
Block after Info Column</td></tr>
<tr><td>msrp_display_actual_price_type</td><td colspan="2">Determines where the actual price of a product is visible to the customer. Values:</td></tr>
</table>

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	In Cart — Displays the actual product price in the shopping cart. Before Order Confirmation — Displays the actual product price at the end of the checkout process, just before the order is confirmed. On Gesture — Displays the actual product price in a popup when the customer clicks the "Click for price" or "What's this?" link.
`country_of_manufacture`	Identifies the country where the product was manufactured.
`additional_attributes`	Additional attributes created for the product. For example: has_options=0,required_options=0 color=Black,has_options=0,required_options=0,size_general=XS
`qty`	The quantity of the product that is currently in stock.
`out_of_stock_qty`	The stock level that determines the product to be out of stock.
`use_config_min_qty`	Determines if the default value from the configuration is used, and corresponds to the Use Config Settings checkbox. Values: 1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
`is_qty_decimal`	Determines if the `qty` attribute has a decimal value. Values: 1 — (Yes) The value of the `qty` attribute is a decimal value. 0 (or blank) — (No) The value of the `qty` attribute is a whole number (integer).

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
allow_backorders	Determines if your store allows backorders, and how they are managed.
use_config_backorders	Determines if the default configuration setting for backorders is used, and corresponds to the state of the Use Config Settings checkbox. Values: 1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
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: 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: 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:

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
`manage_stock`	Determines if inventory control is used to manage the product. Values: 1 — (Yes) Activates full inventory control to manage stock levels of the product. 0 (or blank) — (No) The system does not keep track of the number of items that are currently in stock.
`use_config_manage_stock`	Determines if the default configuration setting for managing stock is used, and corresponds to the state of the Use Config Settings checkbox. Values: 1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
`use_config_qty_increments`	Determines if the default configuration setting for quantity increments is used, and corresponds to the state of the Use Config Settings checkbox.. Values: 1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
`qty_increments`	Determines if the product is sold in quantity increments. Options: Yes / No
`use_config_enable_qty_inc`	Determines if the default configuration setting to enable quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values:

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	1 — (Yes) The default configuration setting is used for the value of this attribute. 0 (or blank) — (No) The default configuration can be overridden for the value of this attribute.
`enable_qty_increments`	Determines if quantity increments are enabled for the product.
`is_decimal_divided`	Determines if parts of the product can be shipped separately. Options: Yes / No
`website_id`	For installations with multiple websites, identifies a specific website where the product is available. If blank, the product is available in all websites.
`related_skus`	Lists the `sku` of each product that has been identified as a 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`	Specifies the propererties and values assigned to each custom option. For example: name=Color,type=drop_down,required=1,price= price_type=fixed, sku=,option_title=Black|name=Color,type=drop_down,required=1,price=, price_type=fixed,sku=,option_title=White
SERVICE DATA FOR PRODUCT VARIATIONS	

Simple Product CSV File Structure (cont.)

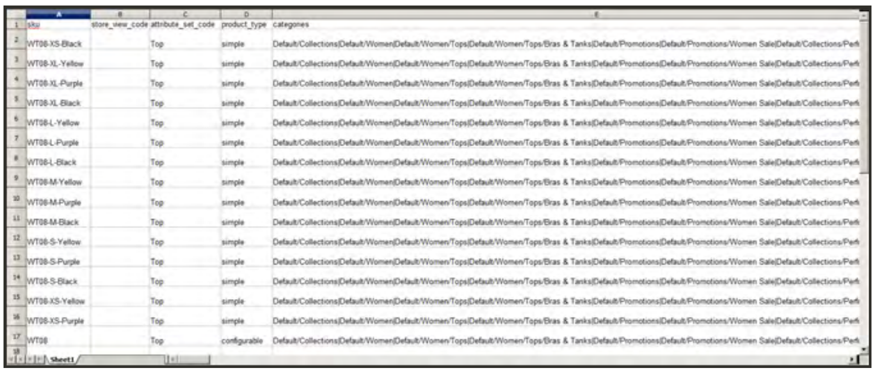
ATTRIBUTE	DESCRIPTION
`_super_products_sku`	The generated SKU for a configurable product variation. For example: WB03-XS-Green Applies to: Configurable Products
`_super_attribute_code`	The attribute code of a configurable product variation. For example: color Applies to: Configurable Products
`_super_attribute_option`	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.



Exported Configurable Product Data

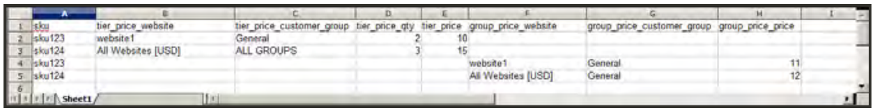
[1]Data that is associated with multiple product options.

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
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 Data

Advanced Price Import/Export allows you to quickly update pricing information for product groups and tier prices. The process to import and export advanced price data is the same as any other entity type. The sample CSV file contains tier and group prices for each product type that supports advanced pricing. Making changes to advanced pricing does not affect the rest of the product record.



sku	tier_price_website	tier_price_customer_group	tier_price_qty	tier_price	group_price_website	group_price_customer_group	group_price_price
sku123	website1	General	2	10			
sku124	All Websites [USD]	ALL GROUPS	3	15			
sku123					website1	General	11
sku124					All Websites [USD]	General	12

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`	Identifies the customers groups where tier pricing is available. For example: ALL GROUPS NOT LOGGED IN General Wholesale Retailer
`tier_price_customer_group`	Identifies the customers groups where tier pricing is available. For example: ALL GROUPS NOT LOGGED IN General Wholesale Retailer

Advanced Pricing Attributes (cont.)

ATTRIBUTE	DESCRIPTION
`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.
`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	
rp_token_created_at	
store_id	
suffix	

Customers Main File (cont.)

ATTRIBUTE	DESCRIPTION
taxvat	
website_id	
password	

Customer Addresses

ATTRIBUTE	DESCRIPTION
_website	
_email	
_entity_id	
city	
company	
country_id	
fax	
firstname	
lastname	
middlename	
postcode	
prefix	
region	
region_id	
street	
suffix	
telephone	
vat_id	
vat_is_valid	
vat_request_date	
vat_request_id	

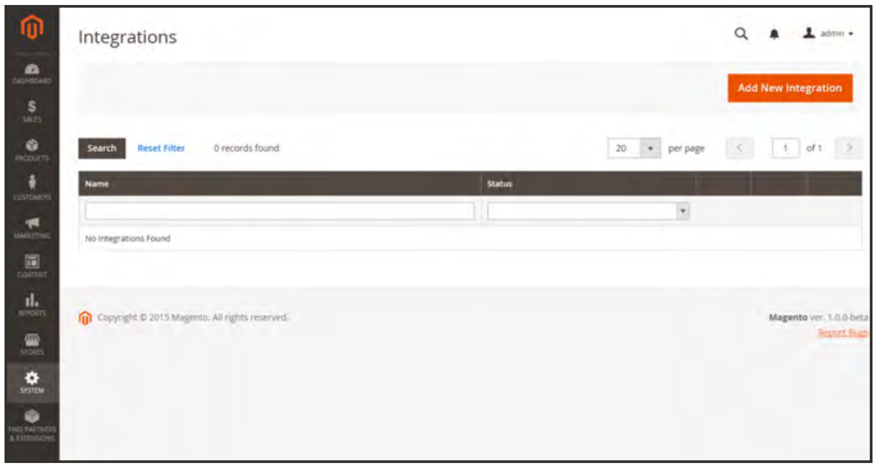
Customer Addresses (cont.)

ATTRIBUTE	DESCRIPTION
vat_request_success	
_address_default_ billing_	Identifies the default billing address. A value of 1 indicates that the address is the default billing address of the customer. Values: 1 / 0
_address_default_ shipping_	Identifies the default shipping address. A value of 1 indicates that the address is the default shipping address of the customer. Values: 1 / 0

CHAPTER 99:

Integrations

Establishes the location of OAuth credentials and redirect URL for third-party integrations, and identifies the available API resources that are needed for the integration.



Integrations

Onboarding Workflow

1 **Authorize the integration.** Go to the system/integration screen, find the relevant integration, and authorize.

2 **Verify and establish login.** When prompted, accept the access requested. If redirected to a third-party, log in to the system, or create a new account. After a successful login, you return to the integration page.

3 **Receive confirmation of authorized integration.** The system sends notification that the integration has been authorized successfully. After setting up an integration and receiving the credentials, it is no longer necessary to make calls to access or request tokens.

To add a new integration:

1. On the Admin sidebar, tap **System**. Then under **Extensions**, choose **Integrations**.
2. Enter the following Integration Info:
   a. Enter the **Name** of the integration, and the contact **Email** address.
   b. Enter the **Callback URL** where OAuth credentials can be sent when using OAuth for token exchange. We strongly recommend using https://.
   c. Enter the **Identity Link URL** to redirect the users to a third-party account with these Magento integration credentials.

New Integration

3. In the panel on the left, choose **API**. Then, do the following:
   a. Set **Resource Access** to one of the following:
      - All
      - Custom
   b. For custom access, mark the checkbox of each resource that is needed:

Resources Needed for Custom Access

4. When complete, tap **Save**.

To change the API guest access security setting:

By default, the system does not permit anonymous guest access to CMS, catalog, and other store resources. If you need to change the setting, do the following:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Services**, choose **Magento Web API**.

3. Expand the **Web API Security Setting** section.

Web API Security

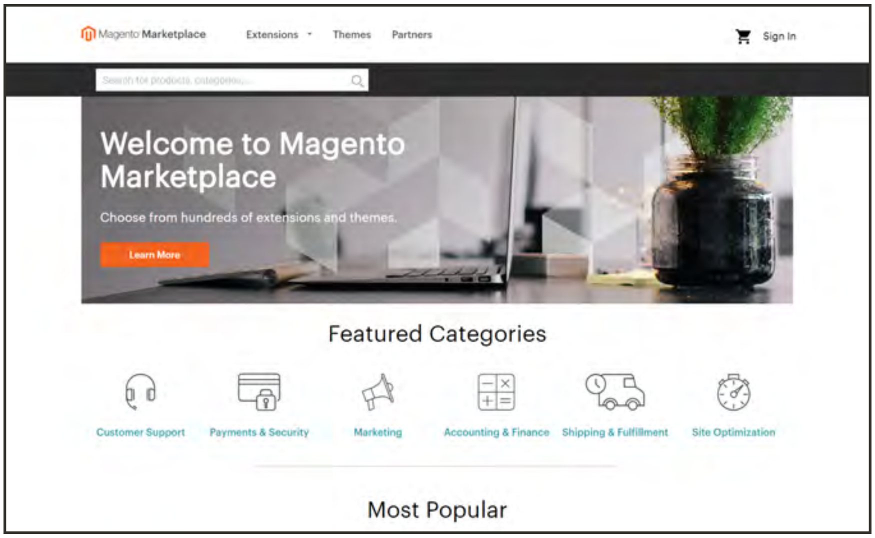
4. Set **Allow Anonymous Guest Access** to "Yes,"

5. When complete, tap **Save Config**.

   To learn more, see: "Restricting access to anonymous web APIs" in the Magento developer documentation.

Magento Marketplace

Magento Marketplace is our next generation application store that offers merchants a curated selection of solutions, and provides qualified developers the tools, platform, and prime location to build a thriving business.



Magento Marketplace

To visit Magento Marketplace:

Go to Magento Markeplace.

To find Magento partners featured on Marketplace:

In the Admin sidebar, tap **Find Partners & Extensions**.

To learn more, see the Magento Marketplace User Guide.For extension installation instructions, see Component Manager in this guide, or the Marketplace Quick Tour.

To install extensions:

Installing an extension is a three-step process that should take place during off-peak hours. Before the extension is installed, your store is put into maintenance mode, checked for readiness, and backed up. After the extension is installed, it must be configured for your store according to the developer's instructions.

For step-by-step installation instructions, see the Marketplace User Guide.

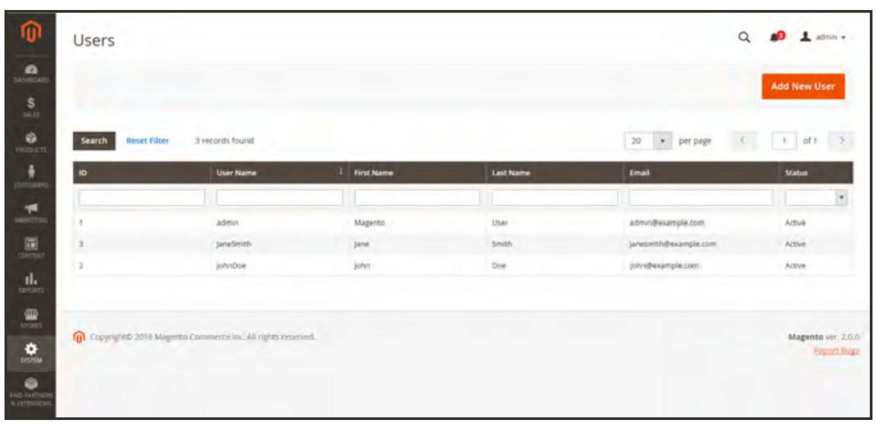
CHAPTER 100:

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.

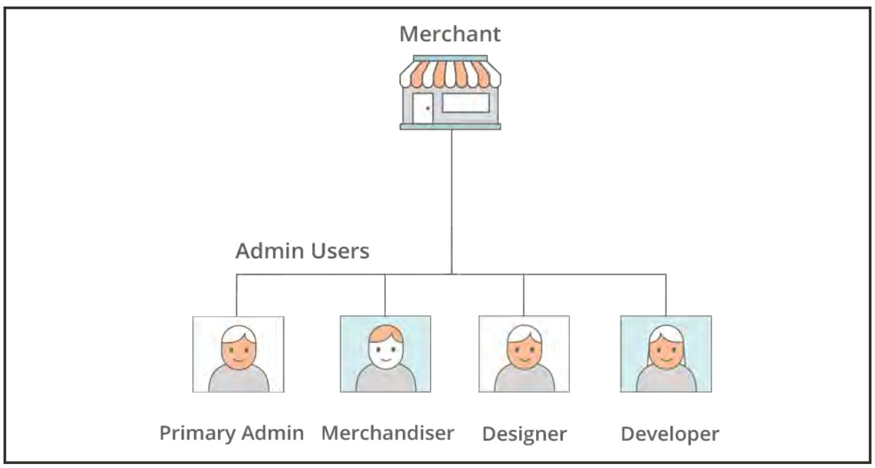


All Users

Adding Users

When your store is first installed, a default Admin account is created with login credentials that give you full administrative access. As a best practice, one of the first things you should do is to create another user account with full Administrator access. That way, you can use one account for your everyday Administrative activities, and reserve the other as a “Super Admin” account in case you forget your regular credentials or they somehow become unusable.

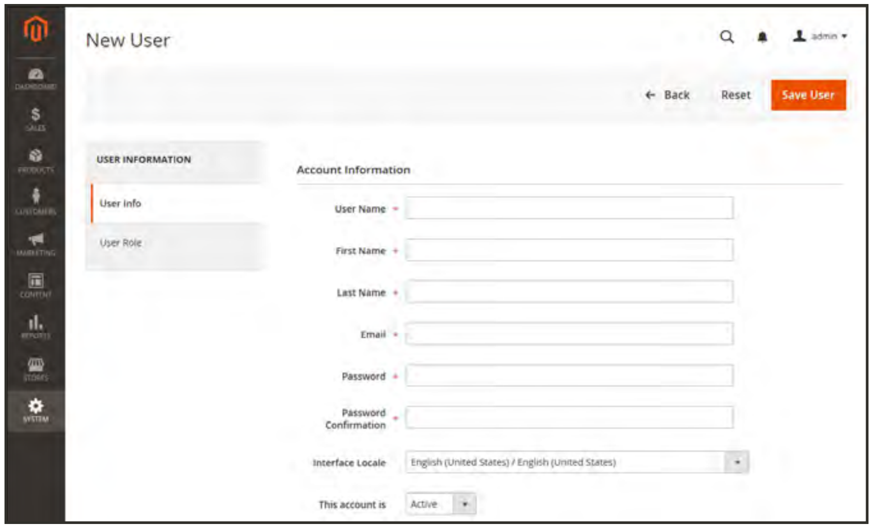
If there are others on your team, or service providers who need access, you can create a separate user account for each, and assign restricted access based on their business need to know. To limit the websites or stores that admin users can access when they log in, you must first create a role with limited scope and access only to the necessary resources. Then, you can assign the role to a specific user account. Admin users who are assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot make changes to any global settings or data.



Example Admin Users

Step 1: Create a New User

1. On the Admin sidebar tap **System**. Then under **Permissions**, choose **All Users**.
2. In the upper-right corner, tap **Add New User**.
3. In the Account Information section, do the following:



New User Account Information

a. Enter the **User Name** for account.

The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is "John," you can also log in as "john."

b. Complete the following information:

- First Name
- Last Name
- Email address

  This email address must be different from the one that is associated with your original Admin account.

c. Assign a **Password** to the account.

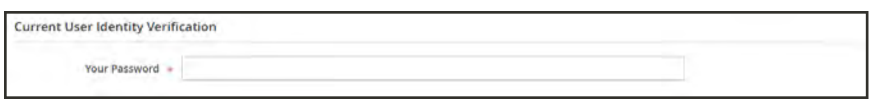
> An Admin password must be seven or more characters long, and include both letters and numbers.

d. In the **Password Confirmation** box, repeat the password to make sure it was entered correctly.

e. If your store has multiple languages, set **Interface Locale** to the language to be used for the Admin interface.

4. Set **This Account is** to "Active."

5. Under Current User Identity Verification, enter **Your Password**.



Current User Identity Verification

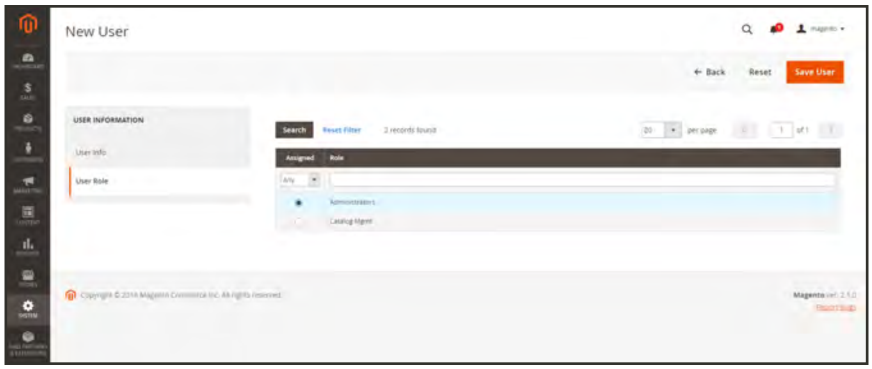
Step 2: Define the Role

1. In the panel on the left, choose **User Role**. The grid lists all the existing roles. For a new store, Administrators is the only role available.

2. In the Assigned column, select the **Administrators** option.

3. Tap **Save User**.

   You now have two accounts with Administrator access.



Add New User Role

Admin Password Requirements

FIELD	DESCRIPTION
Password	An Admin password must be seven or more characters long, and include both letters and numbers. For additional password options, see: Configuring Admin Security.

Locked Users

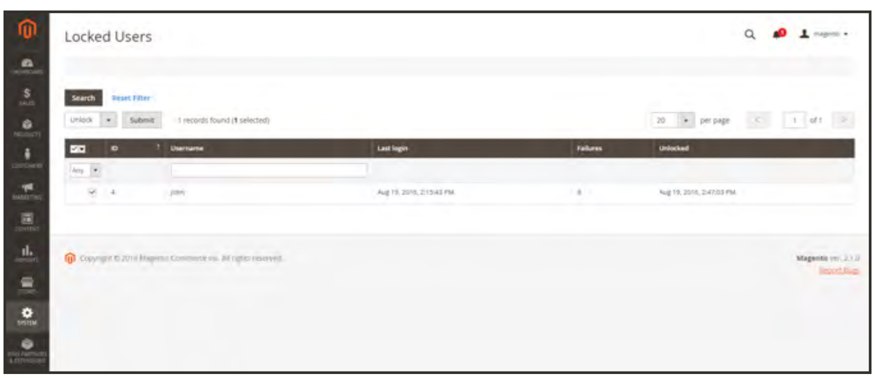
For the security of your business, user accounts are locked by default after six failed attempts to log in to the Admin. Any user account that is currently locked appears in the Locked Users grid. An account can be unlocked by any other user with full Administrator permissions.

Additional password security measures can be implemented in the Advanced Admin configuration. To learn more, see: Configuring Admin Security.

Admin Account Disabled

To unlock an admin account:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **Locked Users**.
2. In the grid, mark the checkbox of the locked account.

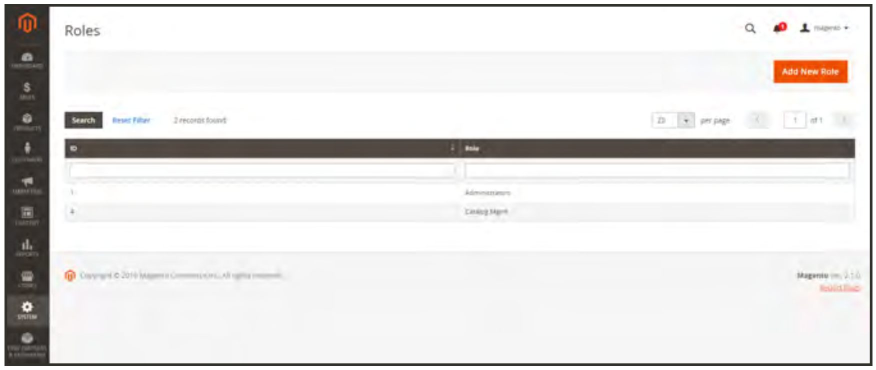


Locked Users

3. In the upper-left corner, set the **Actions** control to "Unlock."
4. Tap **Submit** to unlock the account.

User Roles

To give someone restricted access to the Admin, the first step is to create a role that has the appropriate level of permissions. After the role is saved, you can add new users and assign the restricted role to grant them limited access to the Admin.



Roles

To set up a role:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
2. In the upper-right corner, tap **Add New Role**. Then, do the following:

Step 1: Define the Role

1. Under **Role Information**, enter a descriptive **Role Name**.
2. Under **Current User Identity Verification**, enter **Your Password**.

Role Name

Step 2: Assign Resources

Important! When assigning resources, be sure to disable access to the Permissions tool if you are limiting access for a given role. Otherwise, users will be able to modify their own permissions.

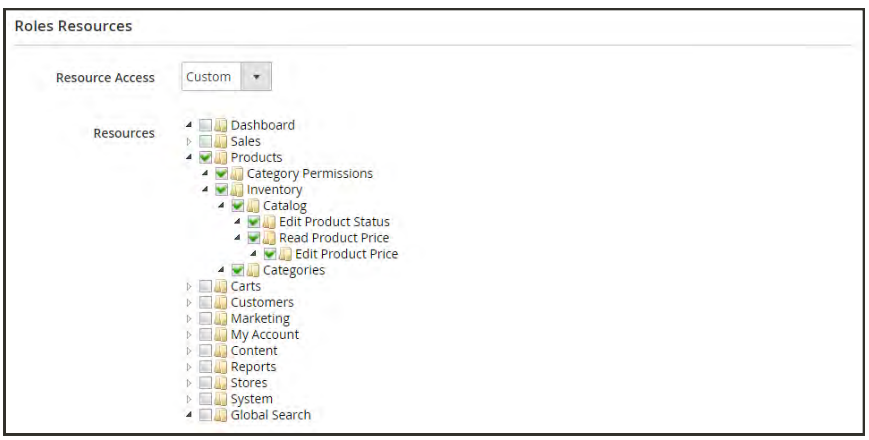
1. Set **Role Scopes** to one of the following:
   - All
   - Custom

   If set to “Custom” for a multisite installation, mark the checkbox of the website and store where the role is to be used.

Custom Role Scope

2. Under **Roles Resources**, set **Resource Access** to “Custom.”
3. In the tree, mark the checkbox of each Admin **Resource** that the role can access.

   To create an Admin role with access to tax settings, choose both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role. The shipping settings determine the store tax rate that is used for catalog prices.



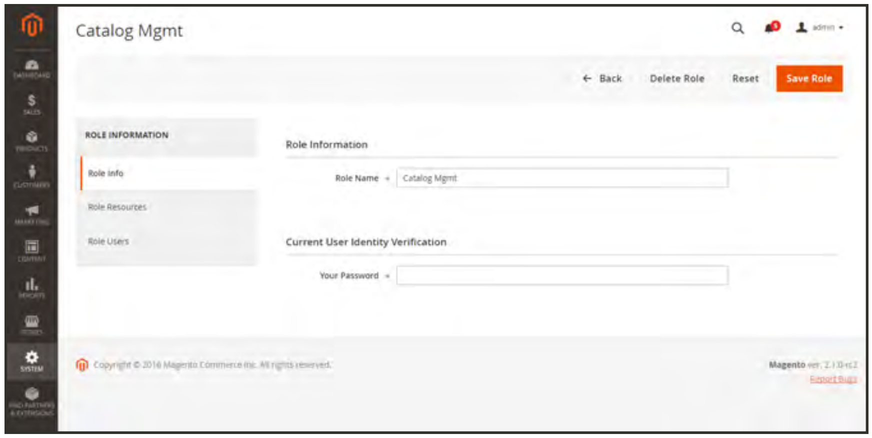
Role Resources Assigned

4. When complete, tap **Save Role**.

   The role now appears in the grid, and can be assigned to new user accounts.

To edit a role:

1. From the **Roles** grid, open the record in edit mode.
2. Under **Current User Identity Verification**, enter **Your Password**.



Editing a Role

3. In the panel on the left, choose **Role Users**.

   The Role Users option appears only after a new role is saved.

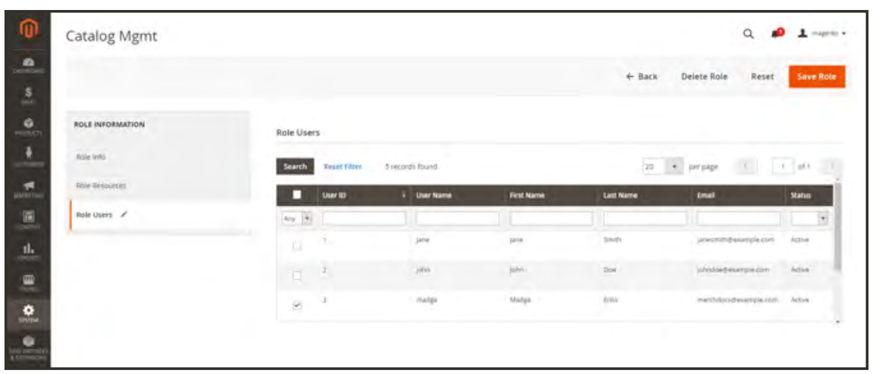
4. To search for a specific user record, do the following:

   a. Enter the value in the search filter at the top of a column. Then, press **Enter**.

   b. When you are ready to return to the full list, click **Reset Filter**.

5. Mark the checkbox of any user(s) to be assigned to the role.

6. Tap **Save Role**.



Role Users

Role Resources

Access to the following resources can be assigned to a custom role. See the linked page to learn more about the capabilities that are associated with each role.

Role Resources

ROLE	DESCRIPTION	
Dashboard		
Sales	Operations	Orders Invoices Shipments Credit Memos Returns Billing Agreements Transactions
	Archive	
	Shopping Cart Management	
Catalog	Inventory	
		Products
		Categories
Carts	Shopping Cart Management	
Customers	All Customers	
	Now Online	
	Segments	
Marketing	Promotions	Catalog Price Rule Related Products Rules Cart Price Rules Gift Card Accounts
	Private Sales	Events Invitations

Role Resources (cont.)

ROLE	DESCRIPTION	
	Communications	Email Templates Newsletter Template Newsletter Queue Newsletter Subscribers Email Reminders
	SEO & Search	Search Terms URL Rewrites Search Synonyms Site Map
	User Content	Reviews
My Account		
Content	Staging	
	Elements	Pages Hierarchy Blocks Banners Widgets Media Gallery
	Design	Themes Schedule
Reports	Marketing Reviews Sales Customers Products Private Sales Statistics	
Stores	Settings	All Stores Configuration Terms & Conditions Order Status

Role Resources (cont.)

ROLE	DESCRIPTION	
	Taxes	
	Currency	Currency Rates Currency Symbols
	Attributes	Customer Attributes Product Update Attributes Attribute Set Returns Ratings
	Other Settings	Customer Groups Reward Exchange Rates Gift Wrapping Gift Registry
System	Data Transfer	Import Export Import/Export Tax Rates Import History Scheduled Import/Export
	Magento Connect	Connect Manager Package Extensions
	Tools	Support Cache Management Web Setup Wizard Backups Index Management Change Indexer Mode
	Permissions	All Users Locked Users User Roles
	Action Log	Report Archive

Role Resources (cont.)

ROLE	DESCRIPTION	
	Other Settings	Notifications Custom Variables Manage Encryption Key
Global Search		

Alternate Media Storage

Magento Commerce gives you the option to store media files in a database on a database server, or on a Content Delivery Network (CDN), as opposed to storing them on the file system of the web server. The advantage of using alternate storage is that it minimizes the effort required to synchronize media when multiple instances of the system that are deployed on different servers that need access to the same images, CSS files, and other media files.

- Database
- Content Delivery Network (CDN)

Using a Database

By default, all images, compiled CSS files, and compiled JavaScript files of the Magento instance are stored in the file system on the web server. You can choose to store these files in a database on a database server. One advantage of this approach is the option of automatic synchronization and reverse synchronization between the web server file system and the database. You can use the default database to store media or create a new one. To be able to use a newly created database as media storage, you must add information about it and its access credentials to the local.xml file.

Database Workflow

1. **Browser requests media.** A page from the store opens in the customer's browser, and the browser requests the media that is specified in the HTML.

2. **System looks for media in file system.** The system searches for the media in the file system and if found, passes it to the browser.

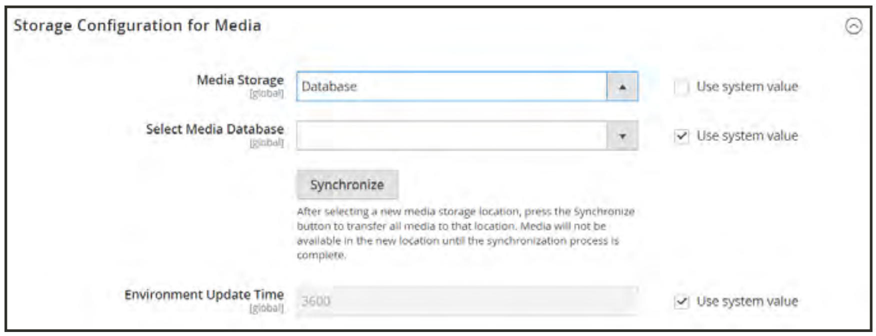
3. **System locates media in database.** If the media is not found in the file system, a request for the media is sent to the database that is specified in the configuration.

4. **System locates media in database.** A PHP script transfers the files from the database to the file system, and sent to the customer's browser. The browser request for media triggers the script to run as follows:

   - If web server rewrites are enabled for Magento and supported by the server, the PHP script runs only when the requested media is not found in the file system.
   - If web server rewrites are disabled for Magento, or not supported by the server, the PHP script runs anyway, even if the required media is available in the file system.

To use a database for media storage:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **System**.
3. In the upper-left corner set **Store View** to “Default Config,” to apply the configuration at the global level.
4. Expand the **Storage Configuration for Media** section. Then, do the following:



Storage Configuration for Media (Database)

   a. Set **Media Storage** to “Database.”

   b. Set **Select Media Database** to the database you want to use.

   c. Tap **Synchronize** to transfer the existing media to the newly selected database.

   d. Enter the **Environment Update Time** in seconds.

5. When complete, tap **Save Config**.

Using a Content Delivery Network

A Content Delivery Network (CDN) can be used to store media files. Although the version of Magento that is installed "on premise" does not include an integration with any specific CDN, you can use the CDN of your choice. Magento Commerce (Cloud) is an exception to this, and includes the Fastly CDN. To learn more, see Fastly in the Magento developer documentation.

After configuring the CDN, you must complete the configuration from the Admin. The changes can be made at either the global or website level. When a CDN is used for media storage, all paths to media on store pages are changed to the CDN paths that are specified in the configuration.

CDN Workflow

1. **Browser requests media.** A page from the store opens in the customer's browser, and the browser requests the media that is specified in the HTML.

2. **Request sent to CDN; images found and served.** The request is sent first to the CDN. If the CDN has the images in storage, it serves the media files to the customer's browser.

3. **Media not found, request sent to Magento web server.** If the CDN doesn't have the media files, the request is sent to the Magento web server. If the media files are found in the file system, the web server sends them to the customer's browser.

Important! For security, when a CDN is used as media storage, JavaScript may not function properly if the CDN is located outside of your subdomain.

To configure a content delivery network:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** as needed.
4. Expand the **Base URLs** section. Then, do the following:

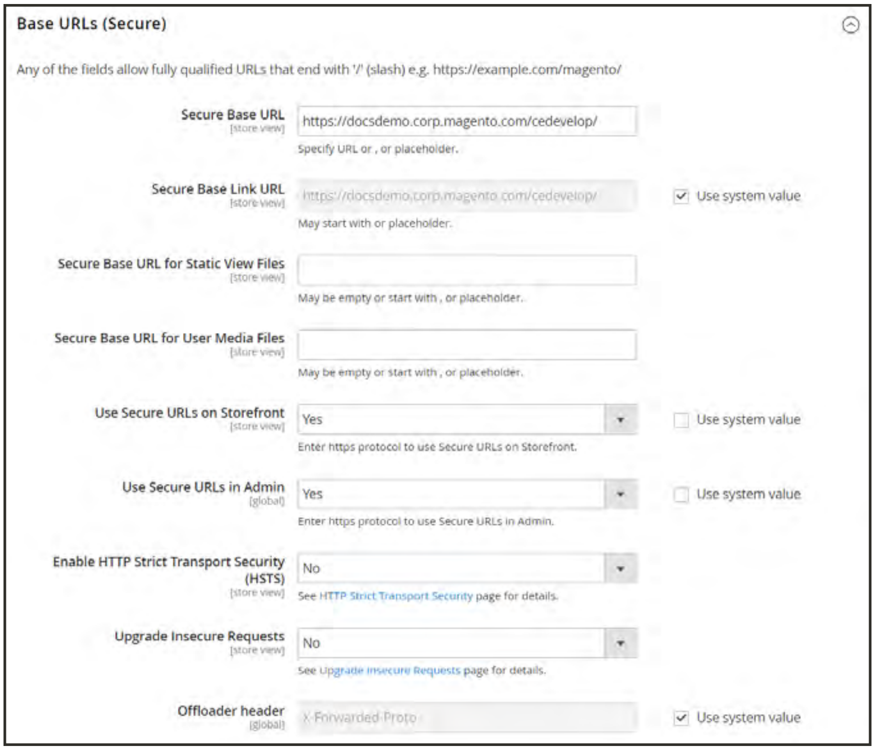
Base URLs

   a. Update the **Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.

   b. Update the **Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

   Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

5. Expand the **Base URLs (Secure)** section.



Base URLs (Secure)

   a. Update the **Secure Base URL for Static View Files** with the URL of the location on the CDN where static view files are stored.

   b. Update the **Secure Base URL for User Media Files** with the URL of the JavaScript files on the CDN.

   Both these fields can be left blank, or can start with the placeholder: `{{unsecure_base_url}}`

6. When complete,tap **Save Config**.

CHAPTER 101:

Security

In this section of the guide, you will learn security best practices, how to manage Admin sessions and credentials, implement CAPTCHA, and manage website restrictions.

- Security Scan
- Security Best Practices
- Configuring Admin Security
- CAPTCHA
- Encryption Key
- Browser Capabilities Detection
- Action Log

Make sure to set up a Security Scan for each domain in your Magento installation. Also, visit the Security Center and join the Security Alert Registry for the latest news about potential vulnerabilities and best practices.

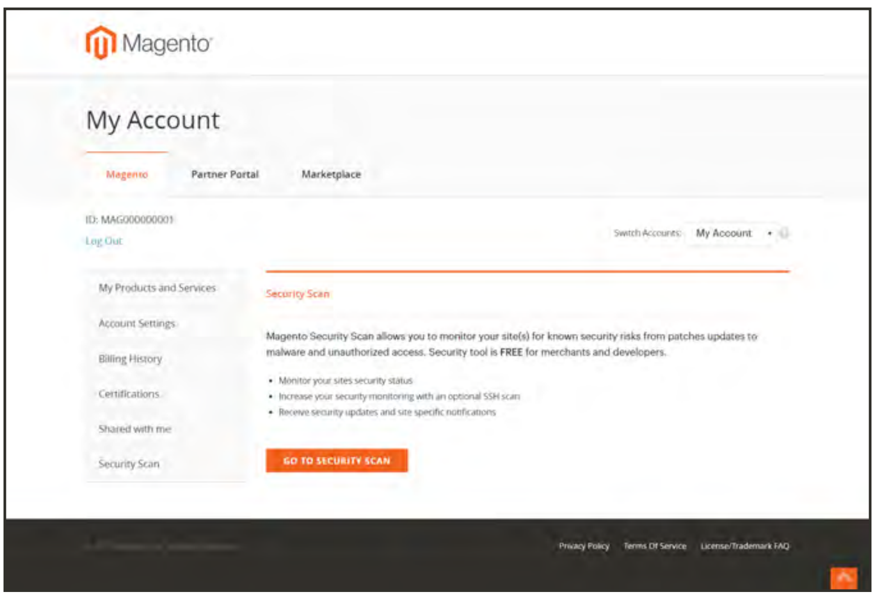
Security Center

Security Scan

Magento Security Scan allows you to monitor each of your Magento sites for known security risks, and to receive patch updates and security notifications.

- Gain insight into the real-time security status of your store.
- Schedule security scan to run weekly, daily, or on demand.
- Receive reports with the results of over thirty security tests and the recommended corrective actions for each failed test.
- Maintain a history of security reports in your Magento account.

The Security Scan tool is available for free from the dashboard of your Magento account. For technical information, see Go live and launch in the developer documentation.



Security Scan

To run Security Scan:

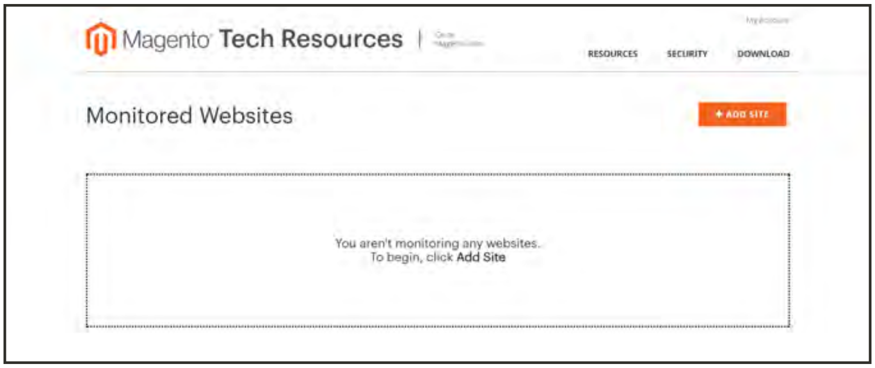
1. Go to the Magento home page, and sign in to your **Magento account**. Then, do the following:

   a. In the panel on the left, choose **Security Scan**. Then, tap **Go to Security Scan**.

   b. Read the **Terms and Conditions**. Then, tap **Agree** to continue.

2. On the **Monitored Websites** page, tap **+Add Site**.

   If you have multiple sites with different domains, you must configure a separate scan for each domain.

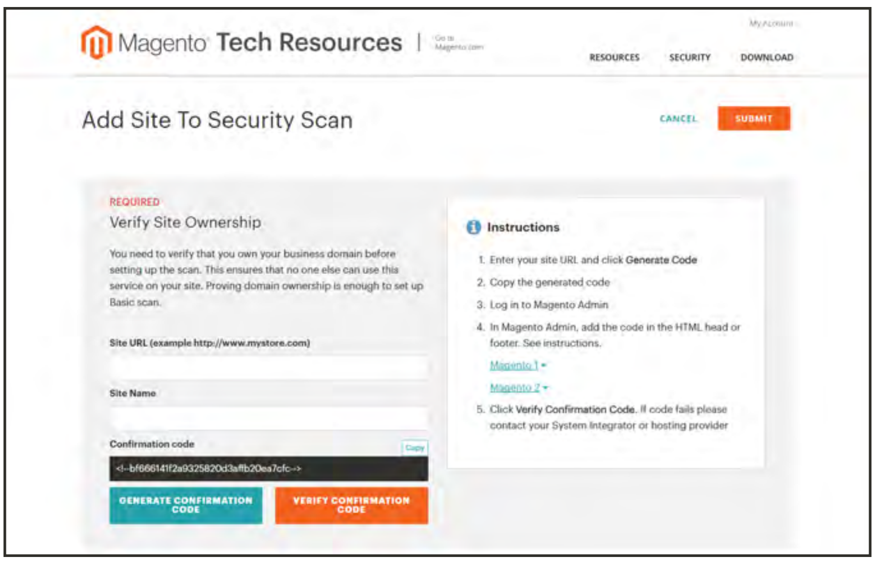


Monitored Sites

3. To verify your ownership of the site domain, do the following:

   a. Enter the **Site URL**, and tap **Generate Confirmation Code**.

   b. Tap **Copy** to copy your confirmation code to the clipboard.



Generate Confirmation Code

4. Log in to the Admin of your store as a user with full Administrator privileges. Then, do the following:

   a. In the Admin sidebar, choose **Content**. Then under **Design**, choose **Configuration**.

   b. Find your site in the list, and click **Edit**.

   c. Expand the **HTML Head** section.

   d. Scroll down to **Scripts and Style Sheets**. Then, click in the text box at the end of any existing code, and press **Ctrl-V** to paste your confirmation code into the text box.

Scripts and Style Sheets

   e. When complete, tap **Save Configuration**.

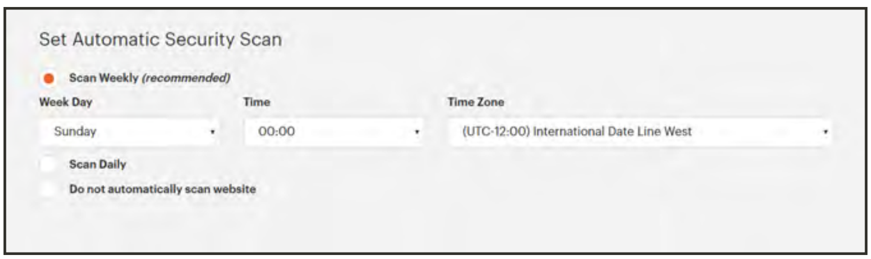
5. Return to the **Security Scan** page in your Magento account. Then, tap **Verify Confirmation Code** to establish your ownership of the domain.

6. After a successful confirmation, **Set Automatic Security Scan** to one of the following:

Scan Weekly (recommended)

Choose the **Week Day**, **Time**, and **Time Zone** that the scan is to take place each week.

By default, the scan is scheduled to begin each week at midnight Saturday, UTC, and continue to early Sunday.



Scan Weekly

Scan Daily

Choose the **Time**, and **Time Zone** that the scan is to take place each day.

By default, the scan is scheduled to begin each day at midnight, UTC.

Scan Daily

7. Enter the **Email Address** where you want to receive notifications of completed scans and security updates.

Email Address

8. When complete, tap **Submit**.

   After the ownership of the domain is verified, the site appears in the Monitored Websites list of your Magento account.

9. If you have multiple websites with different domains, repeat this process to set up a security scan for each.

Security Best Practices

All eCommerce sites are attractive targets to hackers because of the personal and payment information that is required to complete a sale. Even if the system does not directly process credit card transactions, a compromised site might reroute customers to a false page, or alter an order before it is transmitted to the payment processor.

A compromised site can have long-term consequences for both customers and merchants. Customers might suffer financial loss and identify theft, while merchants can face damage to their reputations, loss of merchandise, higher processing fees, revoked privileges with financial institutions, and the threat of lawsuits.

This guide outlines a multifaceted approach to improve the security of your Magento installation. Although there is no single way to eliminate all security risks, there are many things that you can do to make your site a less attractive target. It is crucial for hosting providers, system integrators, and merchants to work together to establish and maintain a secure environment, implement methods for early detection, and determine a plan of action in the event of a breach.

Start Right

Work with reliable hosting providers and solution integrators. When evaluating their qualifications, ask about their approach to security. Verify that they have a secure software development life cycle in accord with industry standards such as The Open Web Application Security Project (OWASP), and that they test their code for security issues.

If you are starting a new site, consider launching the entire site over HTTPs. Taking the lead on this issue, Google now uses HTTPs as a ranking factor.

For an existing installation, plan to upgrade the entire site to run over to a securely encrypted, HTTPs channel. Although you will need to create redirects from HTTP to HTTPs, the effort will future-proof your site. We recommend that you plan to make this change sooner, rather than later.

Protect the Environment

Protecting the environment is the most critical aspect of ensuring the security of your store. Keep all software on the server up to date, and apply security patches as recommended. This applies not only to Magento, but to any other software that is installed on the server, including database software and other websites that use the same server. Any system is only as secure as the weakest link.

Server Environment

- Make sure that the server operating system is secure. Work with your hosting provider to ensure that there is no unnecessary software running on the server.
- Use only secure communications protocol (SSH/SFTP/HTTPS) to manage files, and disable FTP.
- Magento includes `.htaccess` files to protect system files when using the Apache web server. If you use a different web server such as Nginx, make sure that all system files and directories are protected. For an sample Nginx configuration, see: magento-nginx.conf on GitHub.
- Use strong and unique passwords, and change them periodically.
- Keep the system up to date, and immediately install patches when new security issues are discovered.
- Closely monitor any issues that are reported for software components used by your Magento installation, including the operating system, MySQL database, PHP, Redis (if used), Apache or Nginx, Memcached, Solr, and any other components in your specific configuration.
- Limit access to `cron.php` file to only required users. For example, restrict access by IP address. If possible, block access completely and execute the command using the system cron scheduler.

Advanced Techniques

- Automate the deployment process, if possible, and use private keys for data transfer.
- Limit access to the Magento Admin by updating the whitelist with the IP address of each computer that is authorized to use the Admin and Magento Connect downloader. For examples of how to whitelist IP addresses, see: Secure Your Magento Admin.
- Do not install extensions directly on a production server.

  To disable the Magento Connect downloader on the production site, either remove or block access to the `/downloader` directory. You can also use the same whitelisting methods.

Advanced Techniques (cont.)

- Use two-factor authorization for Admin logins. There are several extensions available that provide additional security by requiring an additional passcode that is generated on your phone, or a token from a special device.
- Review your server for “development leftovers.” Make sure there are no accessible log files, publicly visible .git directories, tunnels to execute SQL, database dumps, phpinfo files,or any other unprotected files that are not required, and that might be used in an attack.
- Limit outgoing connections to only those that are required, such as for a payment integration.
- Use a Web Application Firewall to analyze traffic and discover suspicious patterns, such as credit card information being sent to an attacker.

Server Applications

- Make sure that all applications running on the server are secure.
- Avoid running other software on the same server as Magento, especially if it is accessible from the Internet. Vulnerabilities in blog applications such as Wordpress can expose private information from Magento. Install such software on a separate server or virtual machine.
- Keep all software up to date, and apply patches as recommended.

Admin Desktop Environment

- Make sure that the computer that is used to access the Magento Admin is secure.
- Keep your antivirus software up to date, and use a malware scanner. Do not install any unknown programs, or click suspicious links.
- Use a strong password to log in to the computer, and change it periodically. Use a password manager such as LastPass, 1Password, or Dashlane to create and manage secure, unique passwords.
- Do not save FTP passwords in FTP programs, because they are often harvested by malware and used to infect servers.

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

- [x] 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.

- [x] 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.

- [x] 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.

- [x] Use the correct file permissions. Core Magento and directory files should be set to ready only, including `app/etc/local.xml` files.

- [x] Use a strong password for the Magento Admin. To learn more, see: Creating a strong password.

- [x] Take advantage of Magento's security-related configuration settings for Admin Security, Password Options, and CAPTCHA.

Don't be Taken for a Ride

- [x] 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.

- [x] Do not click suspicious links, or open suspicious email.

- [x] Do not disclose the password to your server or to the Magento Admin, unless you are required to do so.

Be Prepared!

- Develop a disaster recovery/business continuity plan. Even a basic plan will help you get back on track in the event of a problem.
- Ensure that your server and database are automatically backed up to external location. A typical setup requires daily incremental backups, with a full backup on a weekly basis. Make sure to test the backup regularly to verify that it can be restored.
- For a large site, simple text file dumps of the database take an unacceptable amount of time to restore. Work with your hosting provider to deploy a professional database backup solution.

Monitor for Signs of Attack

If your system is not immediately patched after a major security breach, there is a high probability that your site is already compromised. Complete a security review periodically to check for signs of attack, and also when contacted by customers with security-related concerns.

Security Review

- Check periodically for unauthorized Admin users.
- Check the Admin Actions Log for suspicious activity.
- Use automated log review tools such as Apache Scalp.
- Work with your hosting provider to review server logs for suspicious activity, and to implement an Intrusion Detection System (IDS) on your network.
- Use a file and data integrity checking tool such as TripWire to receive notification of any potential malware installation.
- Monitor all system logins (FTP, SSH) for unexpected activity, uploads, or commands.

Follow Your Disaster Recovery Plan

In the event of a compromise, work with your internal IT security team if available, or hosting provider, and system integrator to determine the scope of the attack. Taking into consideration the type of compromise and the size of the store. Then, adjust the following recommendations to your business needs.

1. Block access to the site, so the attacker cannot remove evidence or steal more information.
2. Backup the current site, which will include evidence of the installed malware or compromised files.
3. Try to determine the scope of the attack. Was credit card information accessed? What information was stolen? How much time has elapsed since the compromise? Was the information encrypted? Typically you can expect the following types of attack:

Defacing of Site	Site access is compromised, but often the payments information is not. User accounts might be compromised.
Botnetting	Your site becomes part of a botnet that sends spam email. Although data is probably not compromised, your server is blacklisted by spam filters which prevents email that you send to customers from being delivered.
Direct Attack on Server	Data is compromised, backdoors and malware are installed, and the site no longer works. Payment information—provided that it is not stored on the server— is probably safe.
Silent Card Capture	In this most disastrous attack, intruders install hidden malware or card capture software, or possibly modify the checkout process to collect and send out credit card data. Such attacks can go unnoticed for extended periods of time, and result in major compromise of customer accounts and financial information.

4. Try to find the attack vector to determine how the site was compromised, and when. Review server log files and file changes. Note that sometimes there are multiple different attacks on the same system.
5. If possible, wipe and reinstall everything. In case of virtual hosting, create a new instance. Malware might be hidden in an unsuspected location, just waiting to restore itself. Remove all unnecessary files. Then, reinstall all required files from a known, clean source such as files from your own version control system, or the original distribution files from magento.com.
6. Apply all the latest security patches necessary.
7. Reset all credentials, including the database, file access, payment and shipping integrations, web services, and Admin login.
8. If payment information was compromised, it might be necessary to inform your payment processor.

9. Inform your customers about the attack and the type of information affected. If payment information was compromised, they should look for unauthorized transactions. If personal information, including email addresses was compromised, they might be targeted with phishing attacks or spam.

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.

Security Action Plan

If you suspect that your site is compromised, follow this action plan without delay.

☑ **DIAGNOSE.** Run a scan to establish the security status of your Magento store. MageReport.com is a highly regarded service that is available at no charge to members of the Magento community.

☑ **CLEAN.** Hire a qualified consultant or online service to clean your site of all malicious code. Some Magento community members recommend Sucuri Website Malware Removal.

- Check the /media folder for leftover executable code.
- Remove all unknown Admin users and reset all Admin passwords.

☑ **PROTECT.** Keep your Magento installation up-to-date with the most current release. If using an older version, apply all security patches as they become available.

- Review and follow Magento Security Best Practices.
- Subscribe to Magento Security Alerts.

☑ **REPORT.** If you think that you have found a specific vulnerability in Magento, send a description of the problem with technical details to security@magento.com.

☑ **UPGRADE.** For additional peace of mind that comes from 24/7 support, plan your upgrade now to Magento Commerce Cloud.

Configuring Admin Security

Magento recommends that you take a multifaceted approach to protect the security of your store. You can begin by using a custom Admin URL that is not easy to ascertain, rather than the obvious "Admin" or "Backend." By default, passwords that are used to log in to the Admin must be seven or more characters long, and include both letters and numbers. As a best practice, use only strong Admin passwords that include a combination of letters, numbers, and symbols.

For increased security, consider implementing two-factor authentication that generates a token on a separate device. To learn more, see the selection of security-related extensions on Magento Marketplace.

The Admin security configuration gives you the ability to add a secret key to URLs, require passwords to be case sensitive, and to limit the length of Admin sessions, the lifetime of passwords, and the number of login attempts that can be made before the Admin user account is locked. For increased security, you can configure the length of keyboard inactivity before the current session expires, and require the user name and password to be case-sensitive. For additional security, the Admin login can be configured to require a CAPTCHA.

For technical information, see Security overview in the developer documentation.

Security

To configure Admin security:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.

2. In the panel on the left under **Advanced**, choose **Admin**.

3. Expand the **Security** section. Then, do the following:

    a. To prevent Admin users from logging in from the same account on different devices, set **Admin Account Sharing** to "No."

    b. To determine the method that is used to manage password reset requests, set **Password Reset Protection Type** to one of the following:

By IP and Email	The password can be reset online after a response is received from the notification is sent to the email address associated with the Admin account.
By IP	The password can be reset online without additional confirmation.
By Email	The password can be reset only by responding by email to the notification that is sent to the email address associated with the Admin account.
None	The password can be reset only by the store administrator.

    c. In the **Recovery Link Expiration Period (hours)** field, enter the number of hours a password recovery link remains valid.

    d. To determine the maximum number of password requests that can be submitted per hour, enter the **Max Number of Password Reset Requests**.

    e. In the **Min Time Between Password Reset Requests** field, enter the minimum number of minutes that must pass between password reset requests.

    f. To append a secret key to the Admin URL as a precaution against exploits, set **Add Secret Key to URLs** to “Yes.” This setting is enabled by default.

    g. To require that the use of upper- and lowercase characters in any login credentials entered match what is stored in the system, set **Login is Case Sensitive** to “Yes.”

    h. To determine the length of an Admin session before it times out, enter the duration of the session in seconds, in the **Admin Session Lifetime (seconds)** field. The value must be 60 seconds or greater.

    i. In the **Maximum Login Failures to Lockout Account** field, enter the number of times a user can try to log in to the Admin before the account is locked. By default, six attempts are allowed . Leave the field empty for unlimited login attempts.

    j. In the **Lockout Time (minutes)** field, enter the number of minutes that an Admin account is locked when the maximum number of attempts is met.

k. To limit the lifetime of Admin passwords, enter the number of days a password is valid in the **Password Lifetime (days)** field. /For an unlimited lifetime, leave the field blank.

l. Set **Password Change** to one of the following:

Forced	Requires that Admin users change their passwords after the account is set up.
Recommended	Recommends that Admin users change their passwords after account is set up.

4. When complete, tap **Save Config**.

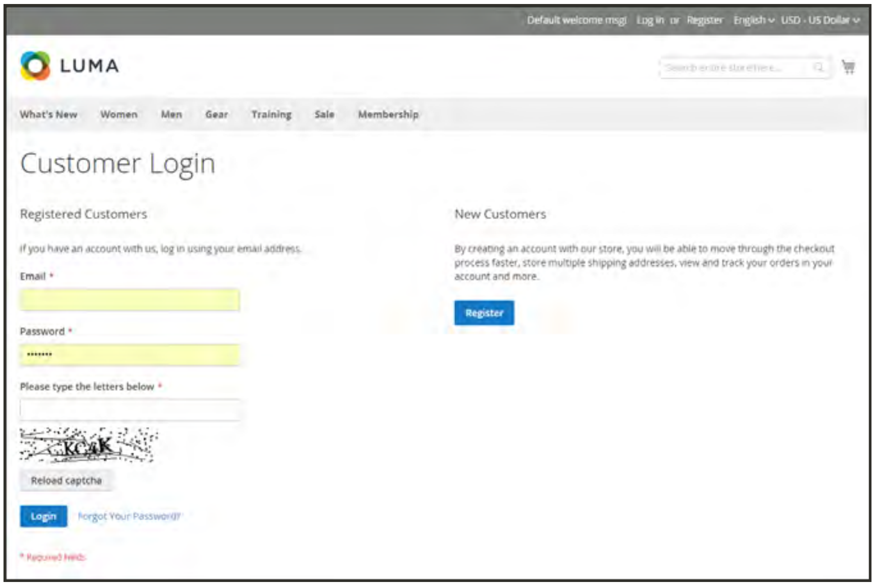
Admin Password Requirements

FIELD	DESCRIPTION
Password	By default, an Admin password must be seven or more characters long, and include both letters and numbers.

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

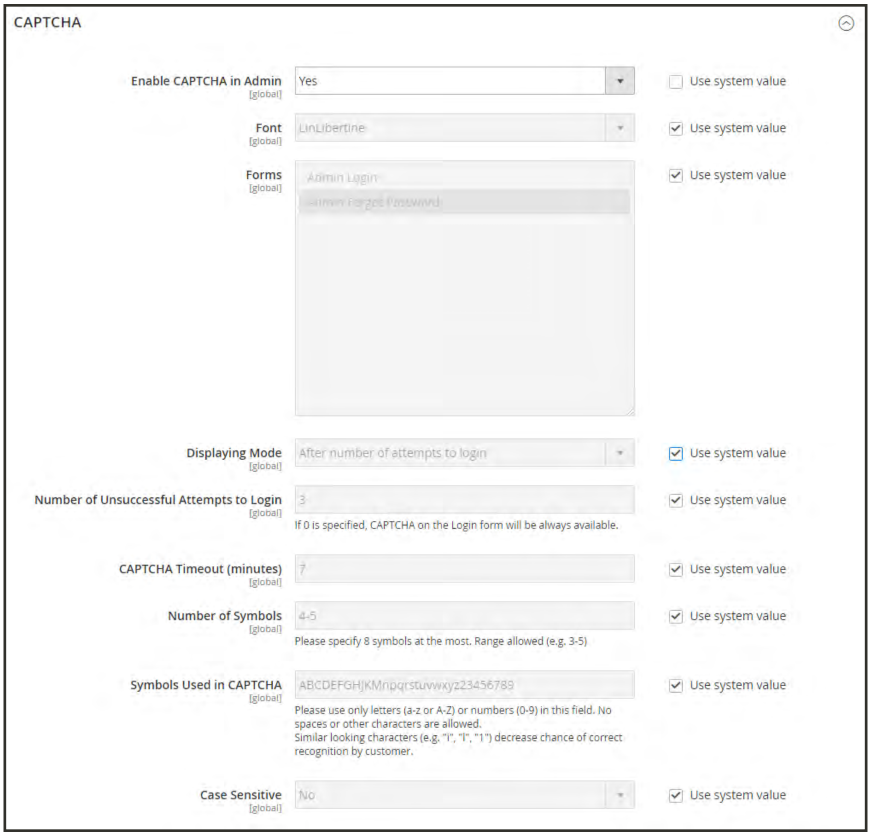
Admin CAPTCHA

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:



Admin CAPTCHA Configuration

a. Set **Enable CAPTCHA in Admin** to "Yes."

b. Enter the name of the Font to be used for the CAPTCHA symbols. Default font: `LinLibertine`

To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the config.xml file of the Captcha module at: `app/code/Magento/Captcha/etc`

c. Select the **Forms** where the CAPTCHA is to be used:

- Admin Login
- Admin Forgot Password

d. Set **Displaying Mode** to one of the following:

Always	CAPTCHA is always required to log in the Admin.
After number of attempts to login	When selected displays the Number of Unsuccessful Attempts to Login field. Enter the number of login attempts allowed. A value of 0 (zero) is similar to setting Displaying Mode to Always. This option does not cover the Forgot Password form. If CAPTCHA is enabled and set to be appear on this form, then it is always included on the form.

e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.

f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page.

g. Enter the **Number of Symbols** used in the CAPTCHA, up to eight. For a variable number of symbols that changes with each CAPTCHA, enter a range, such as 5-8.

h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.

i. To require that users enter the characters exactly as shown set **Case Sensitive** to “Yes.”

5. When complete, tap **Save Config...**.

Customer CAPTCHA

Customers can be required to enter a CAPTCHA each time they log in to their accounts, or after several unsuccessful attempts to log in. CAPTCHA can be used for the following forms in the storefront:

- Create User
- Login
- Forgot Password
- Checkout as Guest
- Register During Checkout
- Contact Us

To configure a Storefront CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand the **CAPTCHA** section, and do the following:

   a. Set **Enable CAPTCHA on Frontend** to "Yes."

   b. Enter the name of the Font to be used for the CAPTCHA symbols.

   To use your own font, the font file must reside in the same directory as your Magento instance, and be declared in the `config.xml` file of the CAPTCHA module.

   c. Choose one of the following **Forms** where CAPTCHA is to be used:

   - Create User
   - Login
   - Forgot Password
   - Checkout as Guest
   - Register during Checkout

   d. Set **Displaying Mode** to one of the following:

Always	CAPTCHA is always required to access the selected form(s).
After number of attempts to login	Enter the number of login attempts before the CAPTCHA appears. A value of 0 (zero) is similar to "Always." When selected, the number of unsuccessful login attempts appears. This option does not apply to the Forgot Password form, which includes the CAPTCHA, if enabled.

e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.

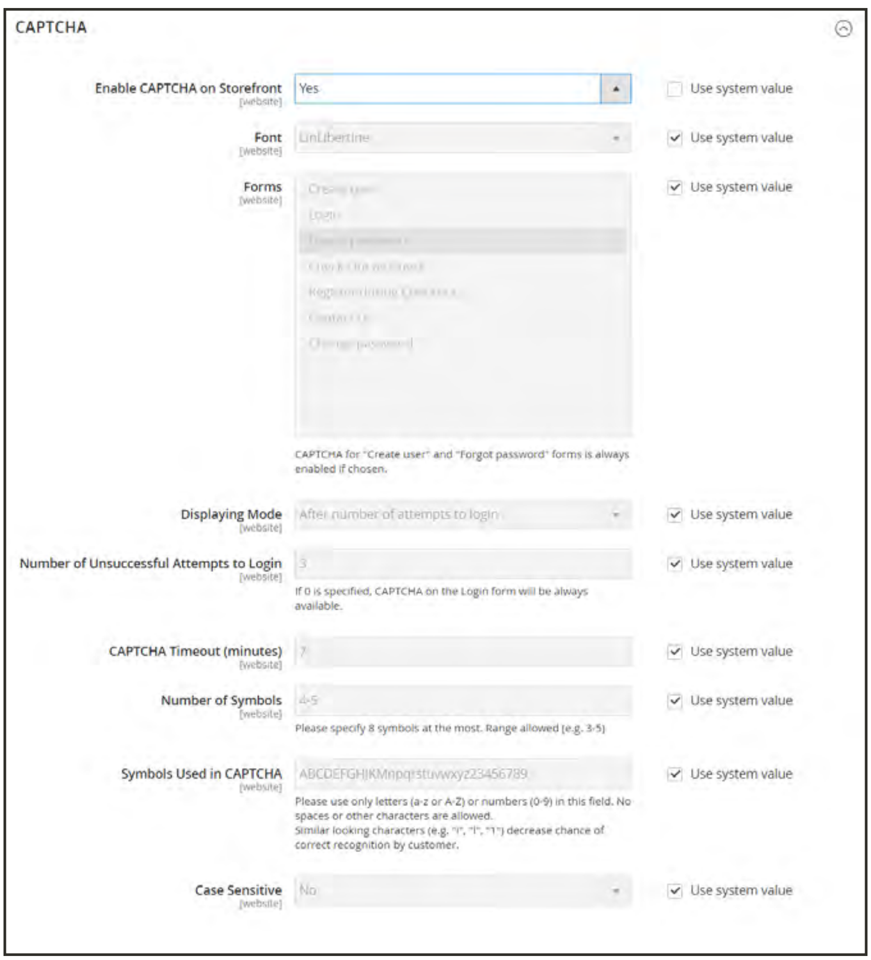
f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the page must be refreshed to generate a new CAPTCHA.

g. Enter the **Number of Symbols** in the CAPTCHA, up to eight. For a variable number of symbols that change with each CAPTCHA, enter a range such as 5-8.

h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.

i. To require that the user enter the upper-and lowercase characters exactly as shown set **Case Sensitive** to "Yes."

4. When complete, tap **Save Config**.



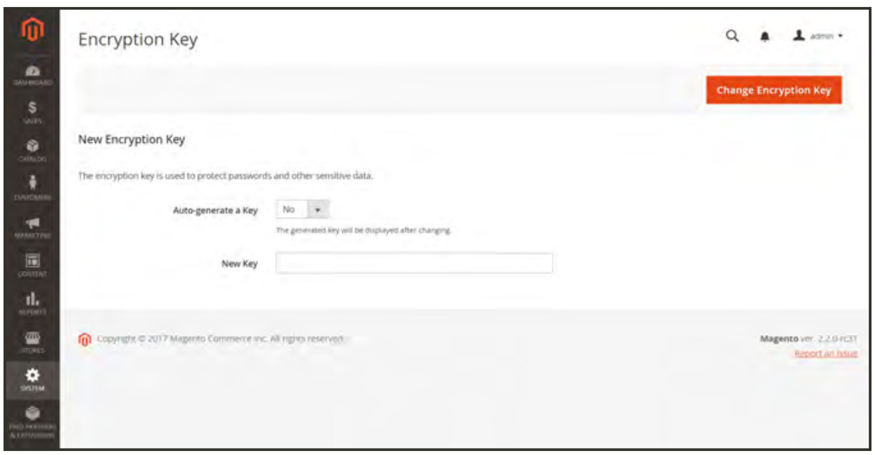
Customer CAPTCHA Configuration

Encryption Key

Magento uses an encryption key to protect passwords and other sensitive data. An industry-standard Advanced Encryption Standard (AES-256) algorithm is used to encrypt all data that requires decryption. This includes credit card data and integration (payment and shipping module) passwords. In addition, a strong Secure Hash Algorithm (SHA-256) is used to hash all data that does not require decryption.

During the initial installation, you are prompted to either let Magento generate an encryption key, or enter one of your own. The Encryption Key tool allows you to change the key as needed. The encryption key should be changed on a regular basis to improve security, as well as at any time the original key might be compromised. Whenever the key is changed, all legacy data is re-encoded using the new key.

For technical information, see Install the Magento software in the developer documentation.



Encryption Key

Step 1: Make the File Writable

To change the encryption key, make sure that the following file is writable:

```
[your store]/app/etc/env.php
```

Step 2: Change the Encryption Key

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Manage Encryption Key**.

2. Do one of the following:

   - To generate a new key, set **Auto-generate Key** to "Yes".
   - To use a different key, set **Auto-generate Key** to "No". Then in the **New Key** field, enter or paste the key that you want to use.

3. Tap **Change Encryption Key**.

4. Keep a record of the new key in a safe place. It will be required to decrypt the data, if any problems occur with your files.

Session Validation

Magento Commerce allows you to validate session variables as a protective measure against possible session fixation attacks, or attempts to poison or hijack user sessions. The Session Validation Settings determine how session variables are validated during each store visit, and if the session ID is included in the URL of the store.

For technical information, see Use Redis for session storage in the developer documentation.

Session Validation Settings

The validation checks to see that visitors are who they say they are by comparing the value in the validation variables against the session data that is already stored in $_SESSION data for the user. Validation fails if the information is not transmitted as expected, and the corresponding variable is empty. Depending on the session validation settings, if a session variable fails the validation process, the client session immediately terminates.

Enabling all of the validation variables can help prevent attacks, but might also impact the performance of the server. By default, all session variable validation is disabled. We recommend that you experiment with the settings to find the best combination for your Magento installation. Activating all of the validation variables might prove to be unduly restrictive, and prevent access to customers who have Internet connections that pass through a proxy server, or that originate from behind a firewall. To learn more about session variables and their use, see the system administration documentation for your Linux system.

To configure the Session Validation Settings:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand the **Session Validation Settings** section. Then, do the following:
   a. To verify that the IP address of a request matches what is stored in the $_SESSION variable, set **Validate REMOTE_ADDR** to "Yes."
   b. To verify that the proxy address of an incoming request matches what is stored in the $_SESSION variable, set **Validate HTTP_VIA** to "Yes."
   c. To verify that the forwarded-for address of a request matches what is stored in the $_SESSION variable, set Validate **HTTP_X_FORWARDED_FOR** to "Yes."
   d. To verify that the browser or device that is used to access the store during a session matches what is stored in the $_SESSION variable, set **Validate HTTP_USER_AGENT** to "Yes."
   e. If you want a user to stay logged in while switching between stores, set **Use SID on Frontend** to "Yes."

   If including SID with analytics, you must configure your analytics software to filter the SID from URLs, so the page visit counts are correct.
4. When complete, tap **Save Config**.

Browser Capabilities Detection

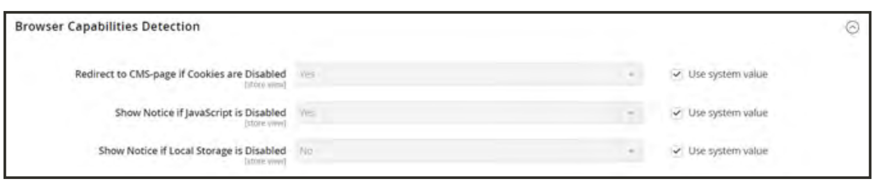
As is true of most websites and applications on the Internet, Magento requires that the visitor's browser allow both cookies and JavaScript for full operations. However, occasionally a user's browser is set to the highest privacy setting that prevents both cookies and JavaScript. Your store can be configured to test the capabilities of each visitor's browser, and to display a notice if the settings need to be changed.

- If the browser's privacy settings disallow cookies, you can configure the system to automatically redirect them to the Enable Cookies page, which explains how to make the recommended settings with most browsers.
- If the browser's privacy settings disallow JavaScript, you can configure the system to display the following message above the header of every page:

For technical information, see Supported browsers in the developer documentation.

To configure browser capabilities detection:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand the **Browser Capabilities Detection** section, and do the following:
   a. To display instructions that explain how to configure the browser to allow cookies, set **Redirect to CMS-page if Cookies are Disabled** to "Yes."
   b. To display a banner above the header when JavaScript is disabled in the user's browser, set **Show Notice if JavaScript is Disabled** to "Yes."



Browser Capabilities Detection

4. When complete, tap **Save Config**.

CHAPTER 102:

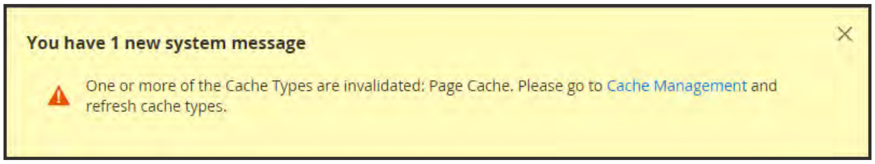
Tools

In this section of the guide, you will learn how to perform routine index and cache management operations, back up the system, and use tools that help our Support team troubleshoot and resolve issues.

- Cache Management
- Index Management
- Backups
- Cron (Scheduled Backups)
- Developer Tools
- Alternate Media Storage
- Web Setup Wizard
- Support

Cache Management

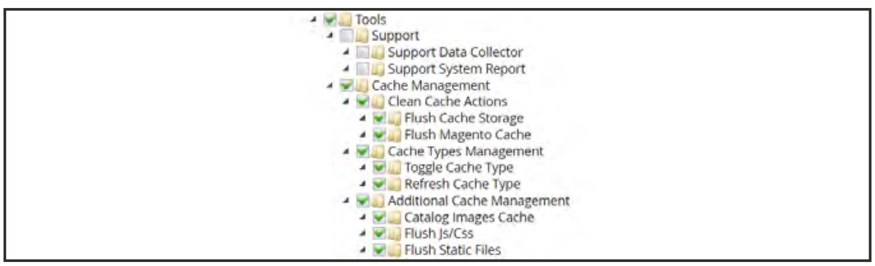
Magento's cache management system is an easy way to improve the performance of your site. Whenever a cache needs to be refreshed, a notice appears at the top of the workspace to guide you through the process. Follow the link to Cache Management, and refresh the invalid caches.



Update Cache Message

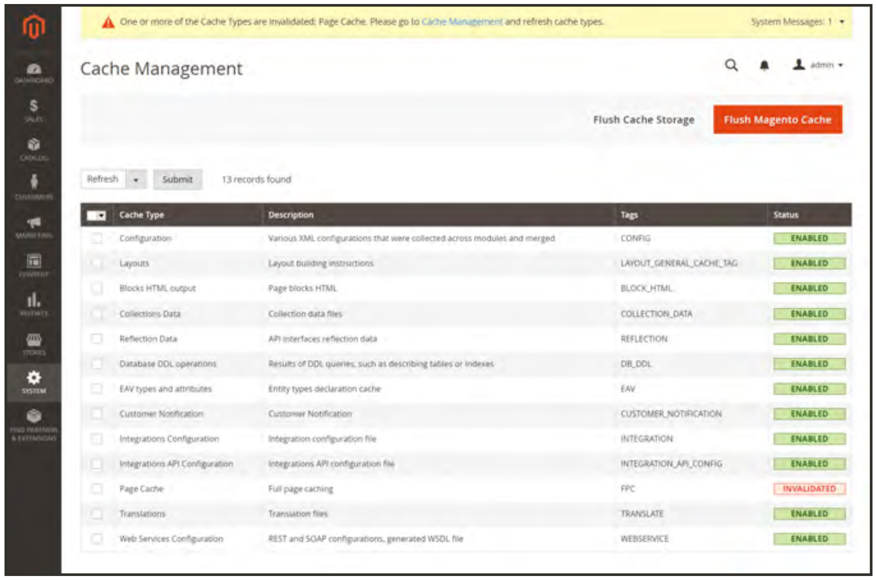
The Cache Management page shows the status of each primary cache and its associated tag. The large buttons in the upper-right corner can be used to flush the Magento Cache, or the all-inclusive Cache Storage. At the bottom of the page there are additional buttons to flush the catalog product images cache and JavaScript/CSS cache. After clearing a cache, always refresh your browser to make sure that you can see the most recent files.

Access to specific cache maintenance actions can be assigned to users by role.



Cache Management Role Resources

For technical information, see Magento cache overview in the developer documentation.



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`
Reflection Data	Clears API interface reflection data, that is typically generated during runtime.
Database DDL operations	Results of DDL queries, such as describing tables or indexes. Associated Tag: `DB_DDL`
EAV types and attributes	Entity types declaration cache. Associated Tag: `EAV`
Customer Notification	Temporary notifications that appear in the user interface.
Integrations Configuration	Integration configuration file. Associated Tag: `INTEGRATION`
Integrations API Configuration	Integrations API configuration file. Associated Tag: `INTEGRATION_API_CONFIG`
Page Cache	Full page caching. Associated Tag: `FPC`
Translations	Translation files. Associated Tag: `TRANSLATE`
Web Services Configuration	REST and SOAP configurations, generated WSDL file. Associated Tag: `WEBSERVICE`

Cache Management Role Resources

RESOURCE
Cache Management
Clean Cache Actions
Flush Cache Storage
Fluch Magento Cache
Cache Type Management
Toggle Cache Type
Refresh Cache Type
Additional Cache Management
Catalog Images Cache
Flush Js/Css
Flush Static Files

Full-Page Cache

Magento Commerce uses full-page caching on the server to quickly display category, product, and CMS pages. Full-page caching improves response time and reduces the load on the server. Without caching, each page might need to run blocks of code and retrieve information from the database. However, with full-page caching enabled, a fully-generated page can be read directly from the cache.

> We recommend Varnish to be used only in a production environment.

Cached content can be used to process the requests from similar types of visits. As a result, pages shown to a casual visitor might differ from those shown to a customer. For the purposes of caching, each visit is one of three types:

Non-sessioned	During a non-sessioned visit, a shopper views pages, but does not interact with the store. The system caches the content of each page viewed, and serves them to other non-sessioned shoppers.
Sessioned	During a sessioned visit, shoppers who interact with the store—through activities such as comparing products or adding products to the shopping cart—are assigned a session ID. Cached pages that are generated during the session are used only by that shopper during the session.
Customer	Customer sessions are created for those who have registered for an account with your store and shop while logged in to their accounts. During the session, customers can be presented with special offers, promotions, and prices that are based on the customer group to which they are assigned.

For technical information, see Configure and Use Varnish and Use Redis for the Magento page and default cache in the developer documentation.

To configure the full-page cache:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Full Page Cache** section.

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:

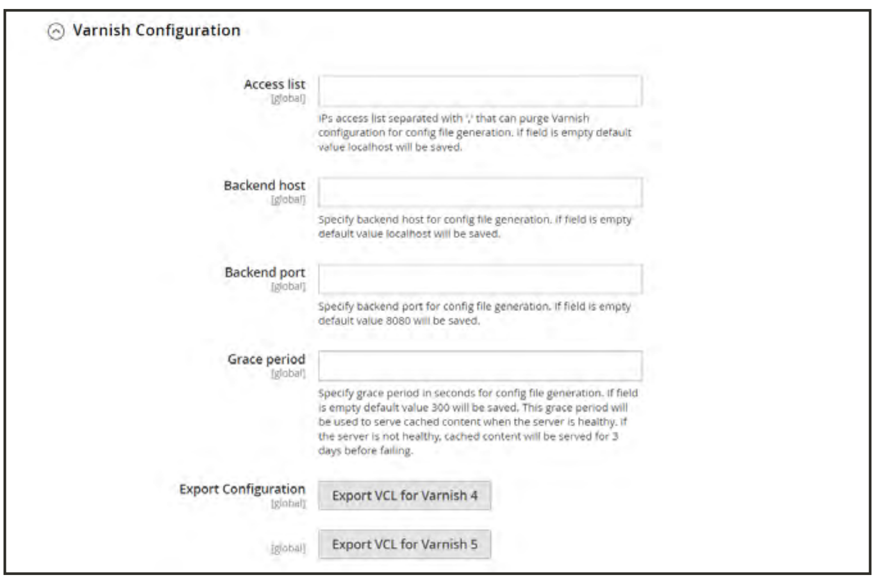
   a. In the **Access list** field, enter the IP addresses that can purge the Varnish configuration to generate a config file. Separate multiple entries with a comma. The default value is “localhost.”

   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**.

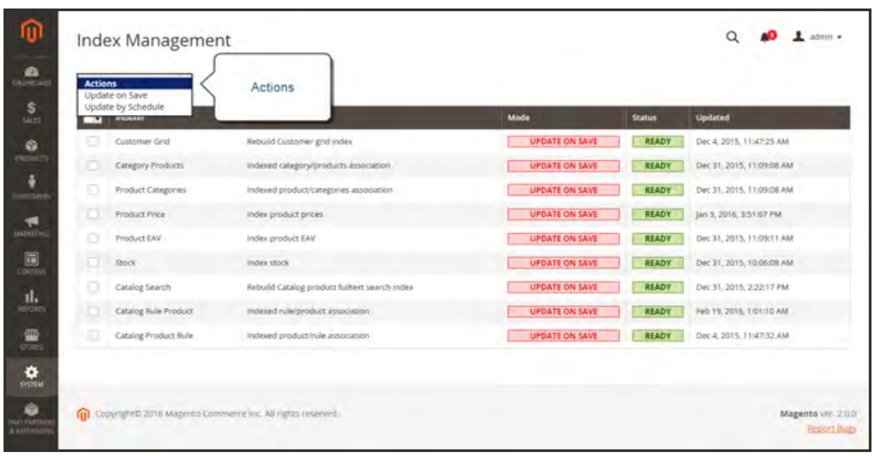
Index Management

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 data speeds up processing, and reduces the time the customer has to wait. For example, if you change the price of an item from $4.99 to $3.99, Magento reindexes the data to show the price change in the store. Without indexing, Magento would have to calculate the price of every product on the fly—taking into account shopping cart price rules, bundle pricing, discounts, tier pricing, and so on. Loading the price for a product might take longer than the customer is willing to wait.

The indexers can be set to either update on save, or on schedule. 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.

For technical information, see Indexing overview in the developer documentation.



Index Management

Index Management has a slightly different presentation for flat product catalogs.

To avoid problems when multiple Admin users update objects that trigger automatic reindexing, we recommend that you set all indexers to run on schedule as cron jobs. Otherwise, every time an object is saved, any objects with interdependencies might cause a deadlock. Symptoms of a deadlock include high CPU usage and MySQL errors. As a best practice, we recommend that you use scheduled indexing .

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. **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

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 storefront options
Catalog Product Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following:

Full Reindex Triggers (cont.)

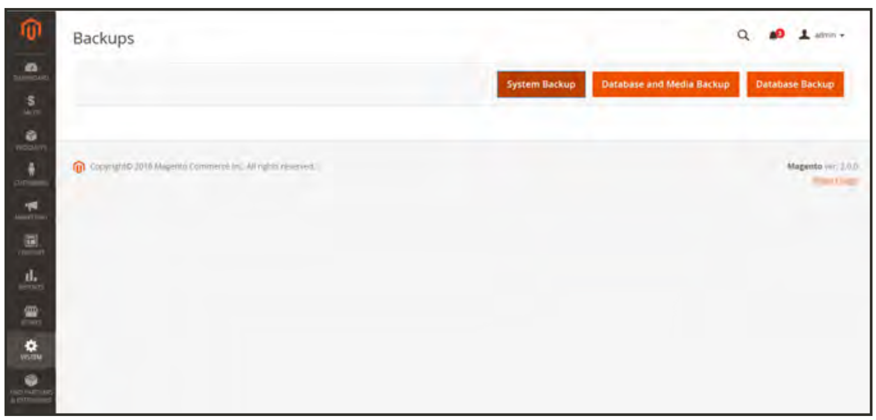
<table>
<tr><th>INDEXER</th><th>EVENT</th></tr>
<tr><td></td><td>Searchable or visible in advanced search
Filterable
Filterable in search
Used for sorting
Change an existing attribute to be any of the preceding.
Enable flat category storefront options</td></tr>
<tr><td>Stock status indexer</td><td>When the following Catalog Inventory options change in the system configuration:<table><tr><td>Stock Options</td><td>Display Out of Stock Products</td></tr><tr><td>Product Stock Options</td><td>Manage Stock</td></tr></table></td></tr>
<tr><td>Price Indexer</td><td>Adding a new customer group.
When any of the following Catalog Inventory options change in the system configuration:<table><tr><td>Stock Options</td><td>Display Out of Stock Products</td></tr><tr><td>Product Stock Options</td><td>Manage Stock</td></tr><tr><td>Price</td><td>Catalog Price Scope</td></tr></table></td></tr>
<tr><td>Category or Product Indexer</td><td>Create or delete a store view
Delete a store
Delete a website</td></tr>
</table>

Backups

Magento Commerce 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.

Back up before installing extensions and updates. Always perform a backup before you install an extension or update. Component Manager includes a backup option that you can use before installing an extension or upgrading to a new release.



Backups

To create a backup:

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Backups**.
2. In the upper-right corner, tap the button for the type of backup you want to create:

System Backup	Creates a complete backup of the database and the file system. During the process, you can choose to include the media folder in the backup.
Database and Media Backup	Creates a backup of the database and the media folder.
Database Backup	Creates a backup of the database.

3. To put the store into maintenance mode during the backup, mark the checkbox. When the backup is complete, maintenance mode is turned off automatically.
4. For a system backup, mark the **Include Media folder to System Backup** checkbox if you want to include the media folder. Then when prompted, confirm the action.

To schedule backups

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Scheduled Backup Settings** section, and do the following:
4. When complete, tap **Save Config**.

Cron (Scheduled Tasks)

Magento performs some operations on schedule by periodically running a script. You can control the execution and scheduling of Magento cron jobs from the Admin. Store operations that run according to a cron schedule include:

- Email
- Catalog Price Rules
- Newsletters
- XML Sitemap Generation
- Currency Rate Updates

In addition, you can configure the following to run according to a cron schedule:

- Order System Grid Updates and Reindexing
- Pending Payment Lifetime

Make sure that the base URLs for the store are set correctly, so the URLs that are generated during cron operations are correct. For technical information, see: Set up cron jobs.

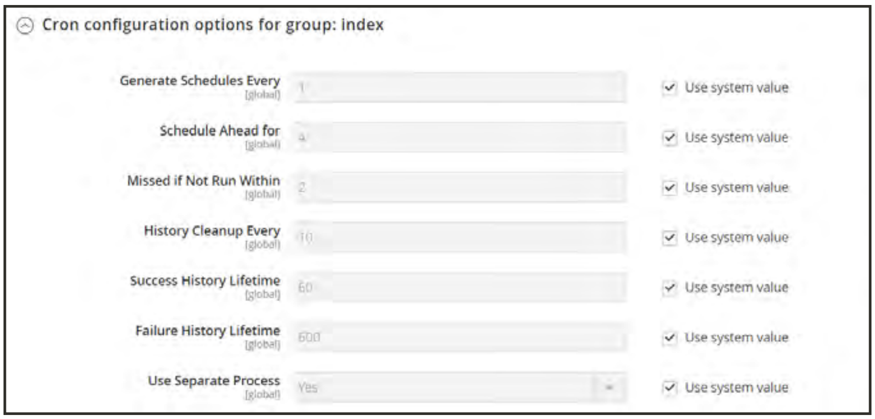
To configure cron:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Cron** section.

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

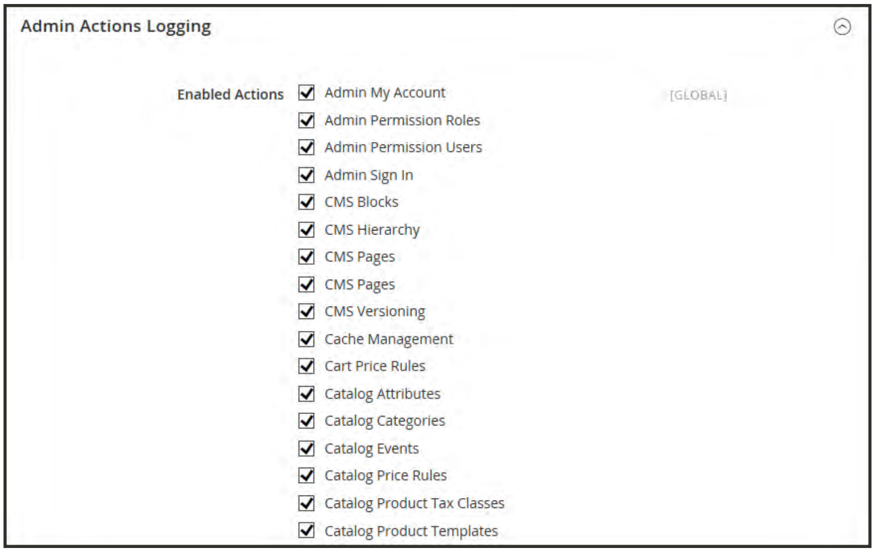
5. When complete, tap **Save Config**.

Developer Tools

Use the Advanced Developer tools to determine the compilation mode during frontend development, create a whitelist of IP addresses, display template path hints, and make spot changes to text in the interface of the storefront and Admin.

Action Log

The Action Log tracks the activities of administrators who work in your store. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object on which the action was performed. Additionally the IP and date are always logged.



Admin Actions Logging

To configure the Action Log:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand the **Admin Actions Logging** section, and for each action, do the following:
   - To enable admin logging for the action, mark the checkbox.
   - To disable admin logging for the action, clear the checkbox.
4. When complete, tap **Save Config**.

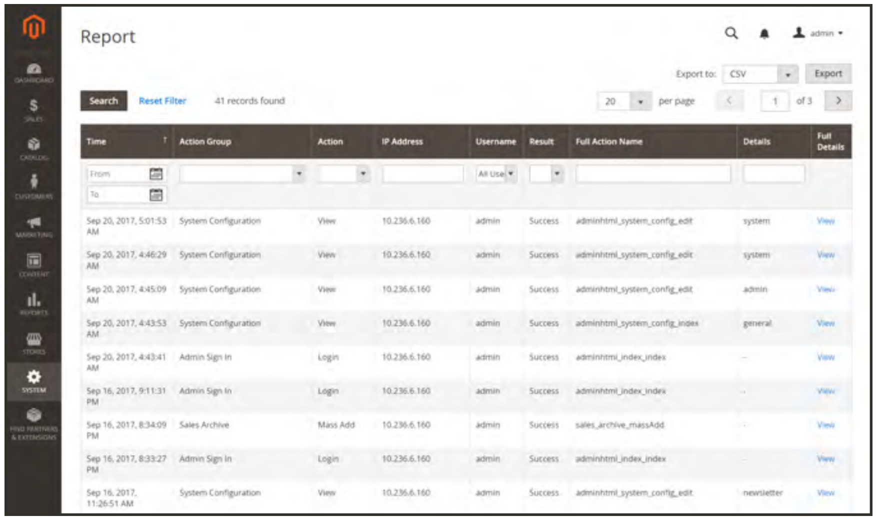
Action Log Report

The Action Log report keeps a detailed record of all admin actions. Each record is time stamped, and records the IP address and name of the user. The log detail includes admin user data and related changes that were made during the action.

To view the log:

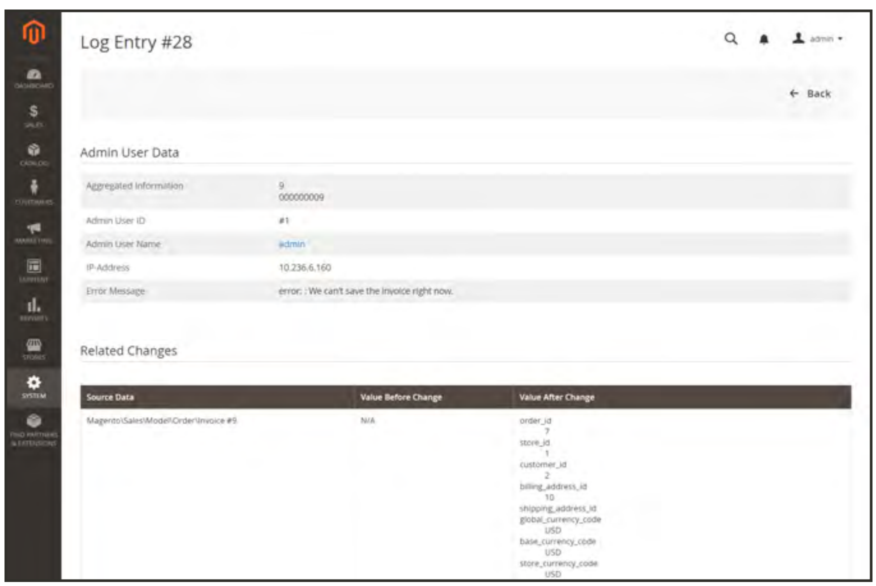
1. On the Admin sidebar, tap **System**.

2. Under **Actions Logs**, choose **Report**.



Report Action Log

3. To view the full details of a report action, click **View**.



Log Entry Details

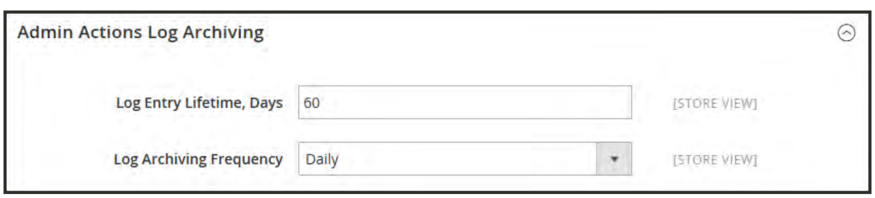
Archive

The Admin Actions archive lists the CSV log files that are stored on the server. In the configuration, you can specify how long the log entries are stored, and how often they are archived. By default, the file name includes the current date in ISO format: yyyyMMddHH.

> Log archiving requires a cron job to be set up.

To configure the log archive:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Admin Actions Log Archiving** section, and do the following:
   a. In the **Log Entry Lifetime, Days** field, enter the number of days that you want to keep the log entries in the database before they are removed.
   b. Set **Log Archiving Frequency** to one of the following:
      - Daily
      - Weekly
      - Monthly

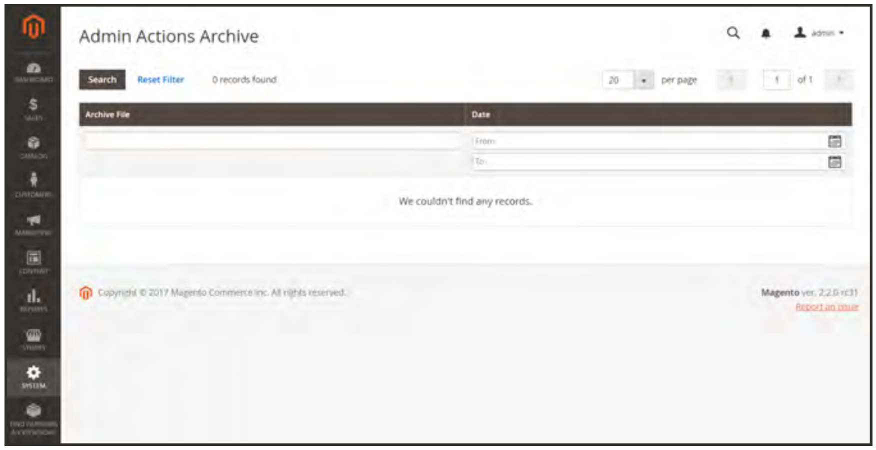


Admin Actions Log Archiving

4. When complete, tap **Save Config**.

To view the archive:

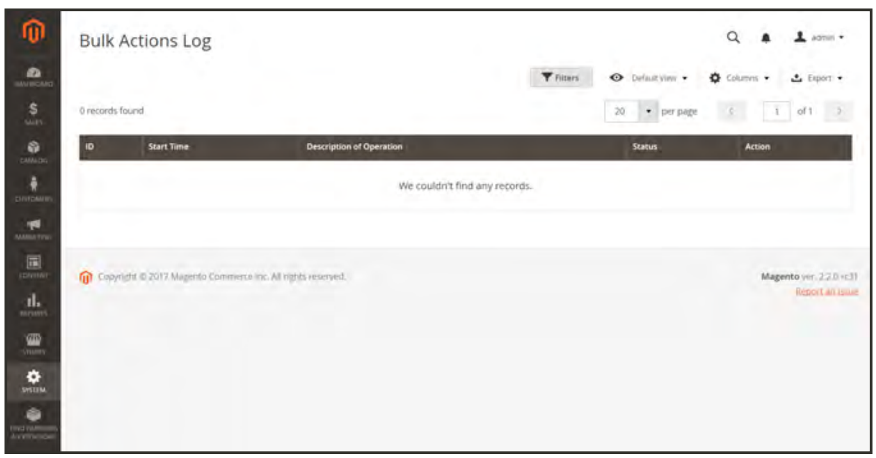
1. On the Admin sidebar, tap **System**.
2. Under **Actions Logs**, choose **Archive**.



Admin Actions Archive

Bulk Actions

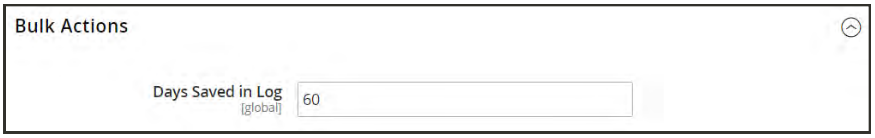
The Bulk Actions Log records the details of asynchronous mass operations that run in the background, such as import/export.



Bulk Actions Log

To configure bulk actions:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand the **Bulk Actions** section.
4. In the Days Saved in Log field, enter the number of days that bulk actions are saved in a log.



Bulk Actions

5. When complete, tap **Save Config**.

To view bulk actions:

1. Find the action in the log.

2. In the Action column, click **Details**.

Amazon Logs

Provides access to the Client and IPN logs, if enabled in the Developer Options section of the Amazon Pay configuration. The following Amazon Logs are available in the System menu of the Magento Admin:

Client	Logs all API calls and responses.
INP	Logs all Instant Payment Notifications that are sent by Amazon.

To display the Amazon Logs:

1. On the Admin sidebar, choose **System**.

2. Under **Amazon Logs**, choose one of the following:

- Client
- IPN

Frontend Development Workflow

The Frontend Development Workflow type determines if Less compilation takes place on the client- or server side during development. Less is an extension of CSS that has additional features and conventions, and that produces streamlined code. Client-side Less compilation is recommended for theme development. Server-side compilation is the default mode. The development workflow options are not available for stores in production mode.

For technical information, see Client-side LESS compilation vs. server-side in the developer documentation.

The Frontend Development Workflow configuration is available in Developer Mode only.

Front-end Development Workflow

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Front-end Development Workflow** section.
4. Set **Workflow Type** to one of the following:

Client side less compilation	Compilation takes place in the browser using the native less.js library.
Server side less compilation	Compilation takes place on the server using the Less PHP library. This is the default mode for production.

5. When complete, tap **Save Config**.

Using Static File Signatures

Adding a digital signature to the URL of static files makes it possible for browsers to detect when a newer version of the file is available. Static files that can be tracked with digital signatures include JavaScript, CSS, images, and fonts. The signature is appended to the path directly after the base URL. If a file's signature differs from what is currently stored in the browser's cache, then the newer version of the file is used.

For technical information, see Static content signing in the developer documentation.

The Static File Settings configuration is available only when working in developer mode.

Static File Settings

To enable signed static files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Static Files Settings** section.
4. Set **Sign Static Files** to "Yes."
5. When complete, tap **Save Config**.

Optimizing Resource Files

The time it takes to load resource files can be reduced by merging and bundling files, and by minimizing code.

- Merging combines separate files of the same type into a single file.
- Bundling is a technique that groups separate files in order to reduce the number of HTTP requests that are required to load a page.
- Minification removes spaces, line breaks, and comments, but does not affect the functionality of the code. Because minimized files cannot be edited, the process should be applied only when you are ready to go into production.

By default, Magento does not merge, bundle, or minimize files, and the project developer should determine which file optimization methods should be used.

For technical information, see Magento Optimization Guide in the developer documentation.

CSS and JavaScript files can be optimized in Developer Mode only.

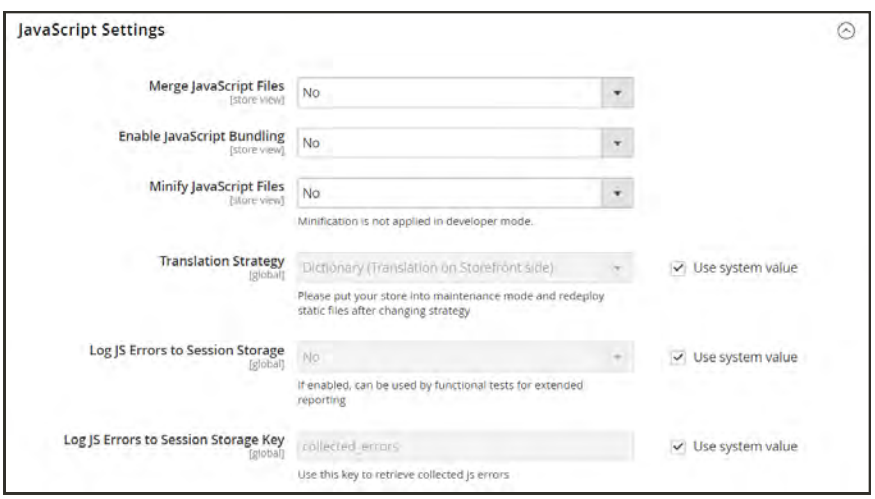
FILE TYPE	SUPPORTED OPERATIONS
CSS Files	• Merge • Minify
JavaScript Files	• Merge • Bundle • Minify
Template Files	• Minify

To optimize resource files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. To optimize CSS files, do the following:
   a. Expand the **CSS Settings** section. Then, do the following:
   b. Set **Merge CSS Files** to "Yes."
   c. Set **Minify CSS Files** to "Yes."

CSS Settings

4. To optimizeJavaScript files, do the following:
   a. Expand the **JavaScript Settings** section. Then, do the following:
   b. Set **Merge JavaScript Files** to "Yes."
   c. Set **Minify JavaScript Files** to "Yes."



JavaScript Settings

5. To minify PHTML template files, do the following:

a. Expand the **Template Settings** section.

b. Set **Minify Html** to “Yes.”

Template Settings

6. When complete, tap **Save Config**.

Developer Client Restrictions

Before using a tool such as Template Path Hints, make sure to add your IP address to the Developer Client Restrictions whitelist to avoid disrupting the shopping experience of customers in the store, .If you don't know your IP address, you can search for it online.

> Developer Client Restrictions can be set in Developer Mode only.

For technical information, see Custom whitelist VCL in the developer documentation.

Add Your IP Address to the Whitelist

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**,choose **Developer**.
3. Expand the **Developer Client Restrictions** section.

Developer Client Restrictions

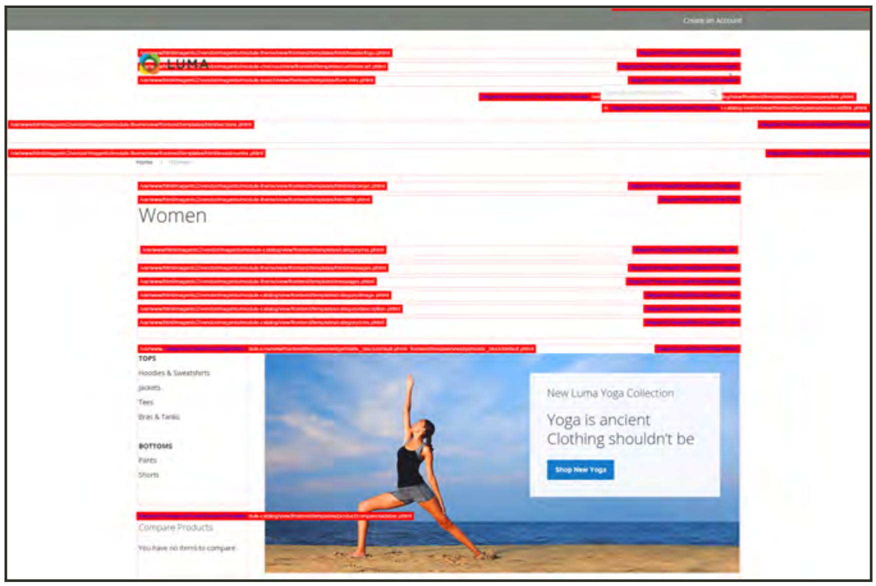
4. In the **Allow IPs** field, enter your IP address. If access is needed from multiple IP addresses, separate each with a comma.
5. When complete, tap **Save Config**.
6. When prompted, refresh any invalid caches.

Template Path Hints

Template Path Hints are a diagnostic tool that adds notation with the path to each template that is used on the page. Template path hints can be enabled for either the storefront or the Admin.

> Template Path Hints can be edited in Developer Mode only.

For technical information, see Locate templates, layouts, and styles in the developer documentation.



Template Path Hints in Storefront

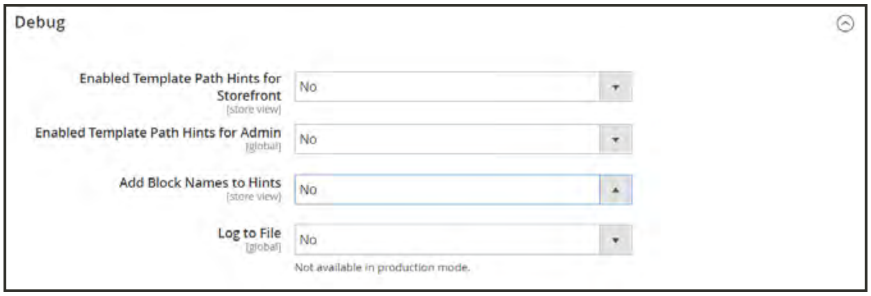
Step 1: Whitelist Your IP Address

Before using template path hints, add your IP address to the whitelist, so you won't interfere with customers who are shopping in the store. When you are finished, make sure to clear the Magento cache to remove all hints from the store.

Developer Client Restrictions

Step 2: Enable Template Path Hints

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand the **Debug** section. Then, do the following:



Debug

   a. To activate template path hints for the store, set **Enabled Template Path Hints for Storefront** to "Yes."
   b. To activate template path hints for the Admin, set **Enabled Template Path Hints for Admin** to "Yes."
   c. To include the names of blocks, set **Add Block Names to Hints** to "Yes."

4. When complete, tap **Save Config**.
5. When you are finished, return to the Admin to disable the hints and clear the cache.

Step 3: Clear the Cache

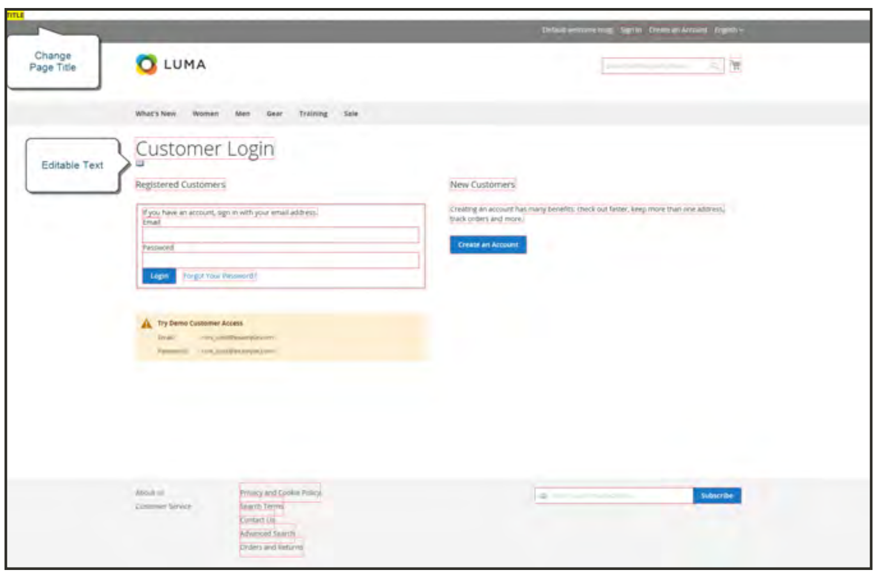
1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.
2. In the upper-right corner, tap **Flush Magento Cache**.

Translate Inline

You can use the Translate Inline tool in developer mode to touch up text in the interface to reflect your voice and brand. When the Translate Inline mode is activated, any text on the page that can be edited is outlined in red. It's easy to edit field labels, messages, and other text that appears throughout the storefront and Admin. For example, many themes use terminology such as "My Account," "My Wishlist," and "My Dashboard," to help customers find their way around. However, you might prefer to simply use the words "Account," "Wishlist," and "Dashboard."

> The Translate Inline tool is available only when working in developer mode.

For technical information, see Translations overview in the developer documentation.



Translatable Text

If your store is available in multiple languages, you can make fine adjustments to the translated text for the locale. On the server, interface text is maintained in a separate CSV file for each output block, and is organized by locale. As an alternate approach, rather than use the Translate Inline tool, you can also edit the CSV files directly on the server.

> To use the Translate Inline tool, your browser must allow pop-ups.

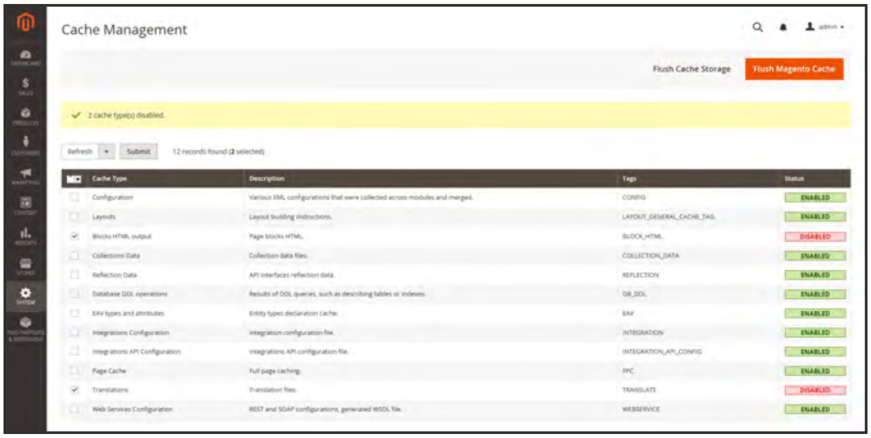
Step 1: Disable Output Caches

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.

2. Mark the following checkboxes:

- Blocks HTML output
- Page Cache
- Translations

3. Set the **Actions** control to "Disable." Then, tap **Submit**.

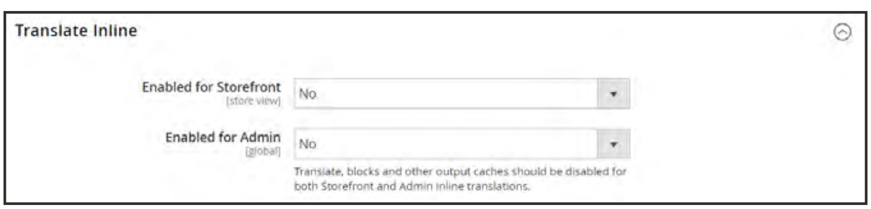


Disable Output Caches

Step 2: Enable the Translate Inline Tool

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. To work with a specific store view, set the **Store View** that is to be updated.
3. In the panel on the left under **Advanced**, choose **Developer**.
4. Expand the **Translate Inline** section. Then if necessary, clear the **Use Website** checkbox.

   The Enabled for Admin option is not available when editing a specific store view.



Translate Inline

5. Set **Enabled for Storefront** to "Yes."
6. When complete, tap **Save Config**.
7. When prompted, refresh the invalid caches, but leave the disabled caches as they are for now.

Step 3: Update the Text

1. Open your storefront in a browser, and go to the page that you want to edit. If necessary, use the language chooser to change the store view.

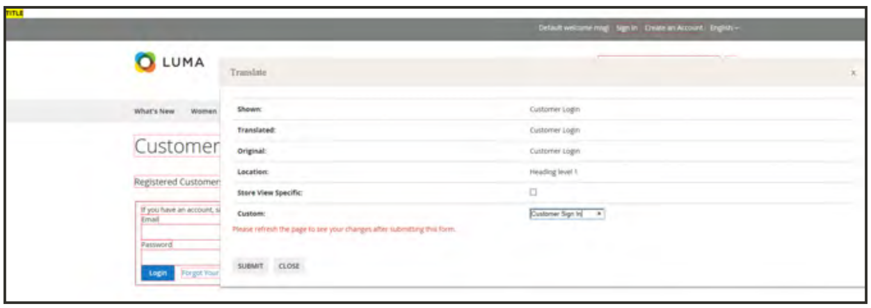
   Each string of text that can be translated is outlined in red. When you hover over any text box, a book icon ( ) appears.

2. Tap the book icon ( ) to open the Translate window. Then, do the following:

   a. If the change is for the specific store view, mark the **Store View Specific** checkbox.

   b. Enter the new **Custom** text.

   c. When complete, tap **Submit**.



Enter Custom Text

3. To see your changes in the store, press the **F5** key to refresh the browser.

4. Repeat this process for any elements in the store to be changed.

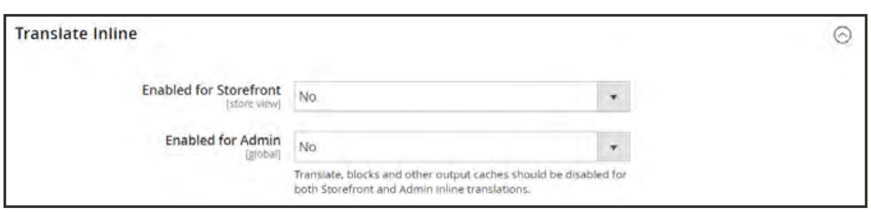
Step 4: Restore Original Settings

1. Return to the Admin of your store. On the Admin sidebar, tap **Store**. Then under **Settings**, choose **Configuration**.

   a. Set **Store View** to the specific view that was edited.

   b. In the panel on the left under **Advanced**, choose **Developer**.

   c. Expand the **Translate Inline** section.



Translate Inline

   a. Set **Enabled for Frontend** to “No.”

   b. When complete, tap **Save Config**.

2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Cache Management**.

   a. Mark the checkbox of the following output caches that were previously disabled:

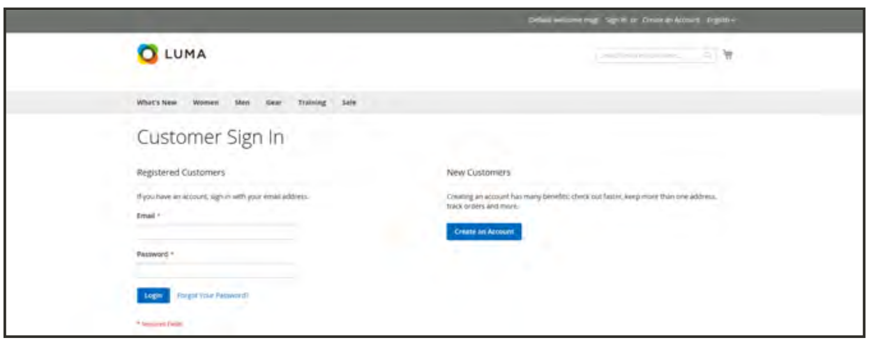
      - Blocks HTML output
      - Page Cache
      - Translations

   b. Set the **Actions** control to “Enable.” Then, tap **Submit**.

   c. When prompted, refresh any invalid caches.

Step 5: Verify the Changes in Your Store

Go to your storefront and examine each page that was updated to make sure the changes are correct. In this example, “Customer Login” was changed to “Customer Sign In.” If changes were made to a specific view, use the Language Chooser to switch to the correct view.



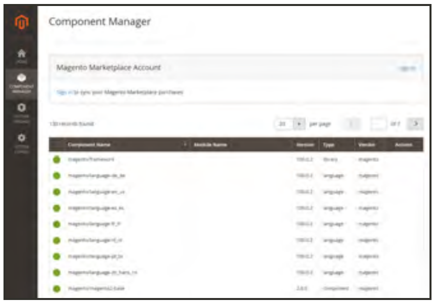
Customer Sign In

Setup Wizard

The Setup Wizard can be used to easily install and uninstall components, modules, and extensions, manage modules, upgrade your installation, and make changes to the Web setup of your installation.

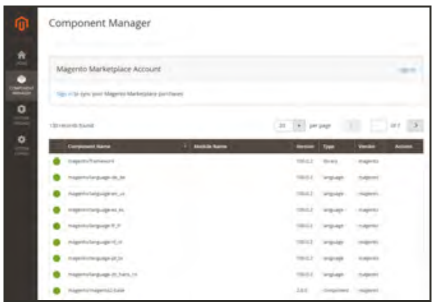
Setup Wizard

Setup Tools



Extension Manager

Extension Manager lists each component that is currently installed, and can be used to synchronize any extensions you have purchased from Magento Marketplace with your system.



Module Manager

Module Manager lists the components and modules that are currently installed in your Magento system.

System Upgrade

The System Upgrade tool can be used to upgrade your installation of Magento. During the process, it checks your system for readiness, creates a backup, and then upgrades your system.

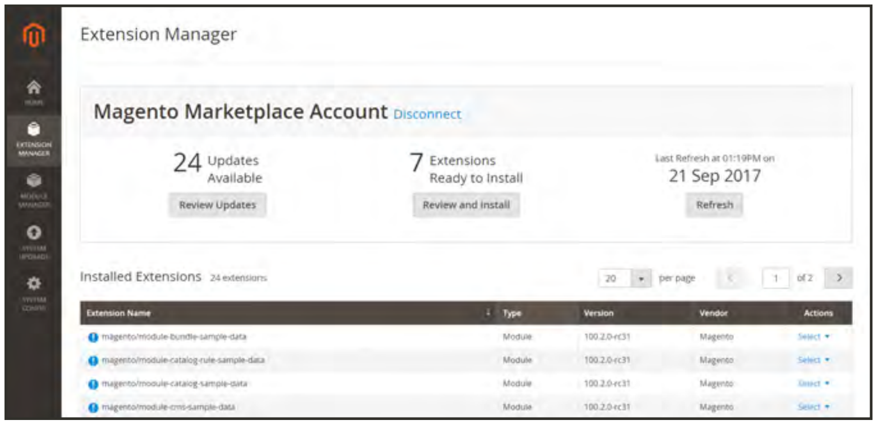
System Config

The System Config tool uses the public and private keys from your Marketplace account to synchronize web setup operations.

Extension Manager

Installing an extension is a three-step process that should take place during off-peak hours. Before the extension is installed, your store is put into maintenance mode, checked for readiness, and backed up. After the extension is installed, it must be configured for your store according to the developer's instructions.

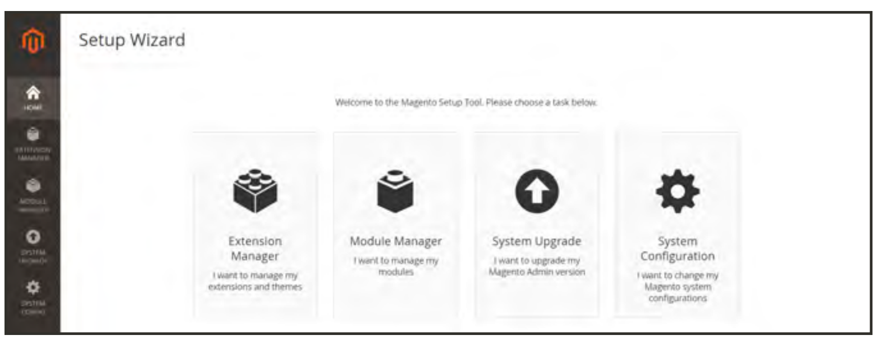
For technical information, see Run the Extension Manager in the developer documentation.



Installed Extensions

To install an extension:

1. Log in to the Admin of your Magento store as a user with full administrator rights.
2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Web Setup Wizard**.

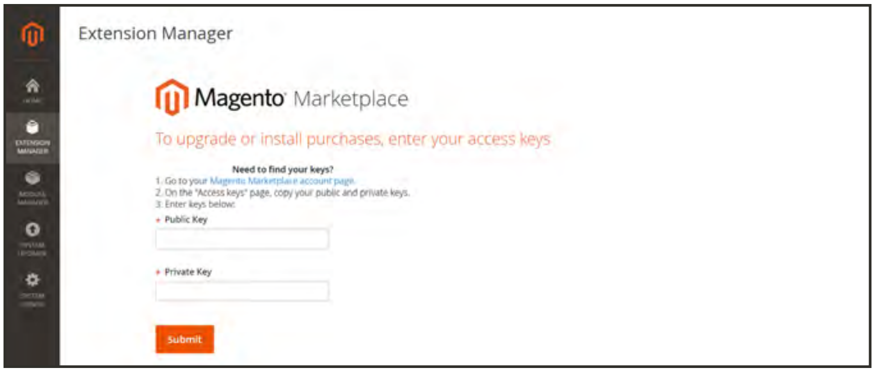


Web Setup Wizard

3. Tap **Extension Manager**. To get your access keys, do the following:
   a. Go to Magento Marketplace. Then in the upper-right corner, log into your account.
   b. On the **Marketplace** tab of your account, under **My Products**, click **Access Keys**.
   c. If you need to generate a new set of access keys, tap **Create a New Access Key**.

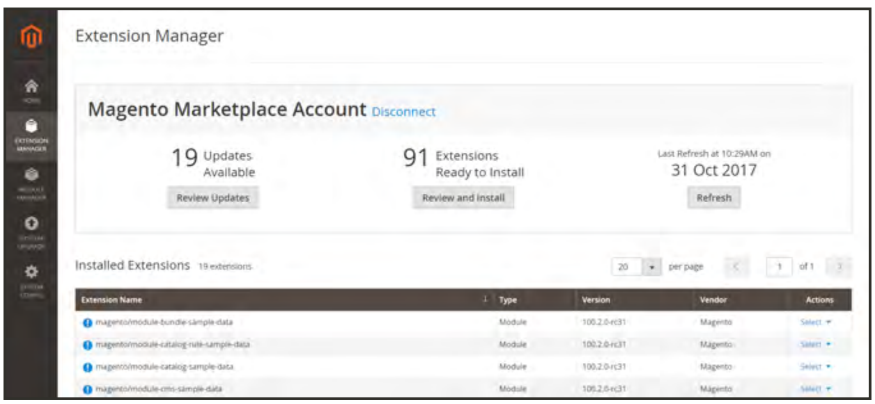
d. Find the set of access keys in the list. Then, copy and paste your **Public Key** and **Private Key** into Extension Manager.

e. Tap **Submit**.



Extension Manager

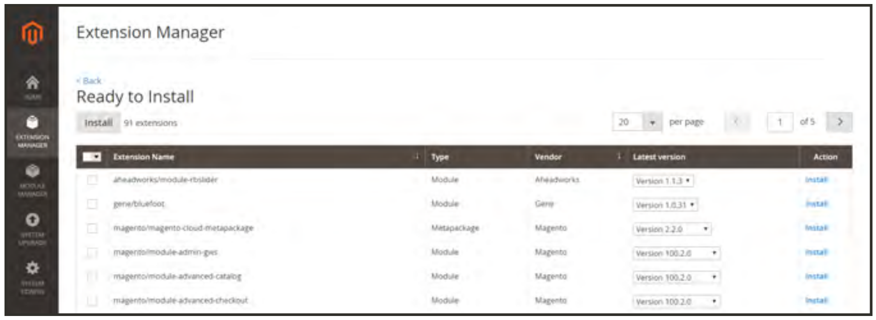
It will take a few minutes to generate the summary and list of all available updates, recently purchased extensions, and currently installed extensions and sample data.



Summary of Your Marketplace Account

4. In the summary at the top of the page, under **Extensions Ready to Install**, tap **Review and Install**. Then, do the following:

a. In the list of extensions that are ready to install, mark the checkbox of the extension that you want to install.



Extensions Ready to Install

b. In the **Latest version** column, choose the version that you want to install. Then in the **Action** column, click **Install**.

5. Follow the onscreen instructions to complete the following:

- Step 1: Readiness Check
- Step 2: Create Backup
- Step 3: Component Install

Step 1: Readiness Check

1. Before the installation begins, your store environment must be checked for compatibility. When ready to begin, tap **Start Readiness Check**. The progress indicator shows where you are in the process.

Readiness Check

2. When the Readiness Check completes successfully, tap **Next**.

Readiness Check Complete

Step 2: Create Backup

1. Your store will be put in maintenance mode while the backup is created. When you are ready to begin, tap **Create Backup**. Then, wait a few minutes for the backup to complete.

Backup Complete

2. You can see the path to the backup file at the bottom of the report. When the backup is complete, tap **Next**.

Step 3: Component Install

1. When you are ready to begin, tap **Install**. Then, wait a few moments for the installation to complete.

Installation Complete

2. When complete, tap **Back to Setup Tool**. Then, tap the **System Configuration** tile.

3. In the upper-right corner of Extension Manager, click the **Reset** link to log out.

Step 4: Configure the Extension for Your Store

1. Log in to the Admin of your store.
2. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
3. In the panel on the left, find the new tab for the extension you installed. Then, follow the instructions from the extension developer to complete the configuration.

Module Manager

Module Manager lists the components and modules that are currently installed in your Magento system. Before a module is disabled, the system completes a readiness check and creates a backup.

- The colored dot in the first column indicates if the module is currently "on" or "off".
- Click the down arrow before the component name to list any dependent packages that are associated with the module.

For technical information, see Run the Module Manager in the developer documentation.

Module Manager

To disable a module:

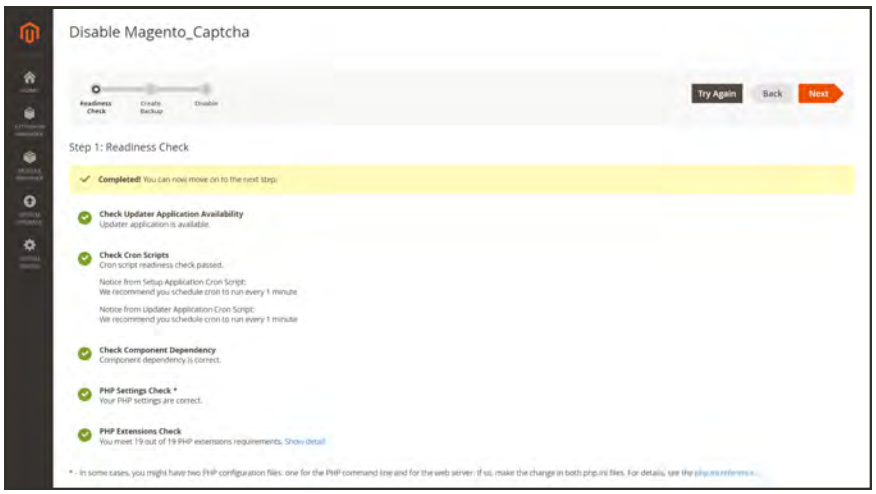
1. Find the module in the list.
2. In the **Action** column, click **Select**. Then, click **Disable**, and do the following:
   a. Under **Step 1: Readiness Check**, tap **Start Readiness Check** to verify that your installation has the correct version of PHP and required extensions and file permissions.

   > A module with dependent components will fail Readiness Check.

Readiness Check

When the readiness check is complete, do one of the following:

- Tap **Next**.
- Correct any issues, and **Try Again**.



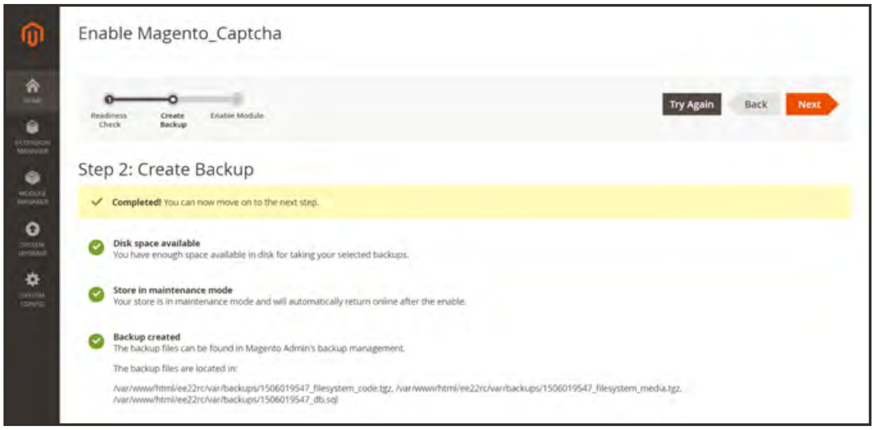
Readiness Check Complete

b. Under **Step 2**, mark the checkbox of each **Backup Option** that you want to include. Then, tap **Create Backup**.

Create Backup

Before the backup is created, the available disk space is checked, and the store is placed in maintenance mode. It might take several minutes — or more — to create the backup, depending on the size of your database.

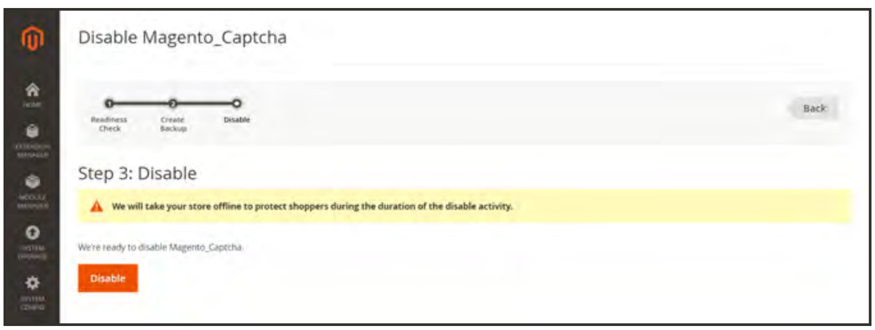
When the backup is complete, tap **Next**.



Backup Complete

c. Under **Step 3**, tap **Disable**.

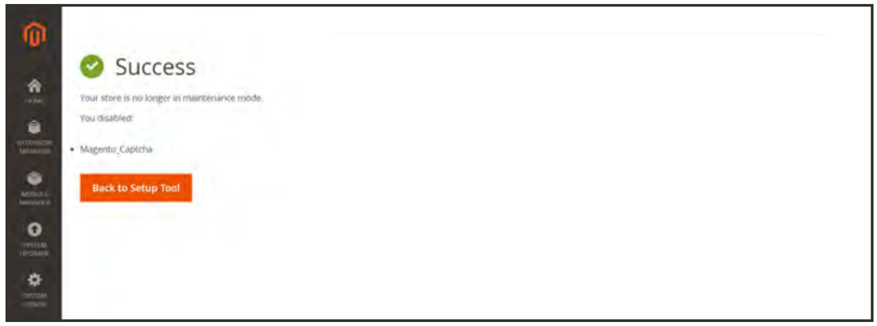
Your store is taken offline while the module is disabled.



Disable Module

d. As the process is running, the details appear in the box below. To toggle the display of the log, tap **Console Log**.

e. When the **Success** page appears, the module is disabled and your store returns to production mode. Tap **Back to Setup Tool** to return to Module Manager.



Success

In the Module Manager list, the red dot in the first column means the module is now disabled.

Module Disabled

To enable a module:

1. Find the module in the list.
2. In the **Action** column, click **Select**. Then, click **Enable** and do the following:
   a. Under **Step 1**, tap **Start Readiness Check**.

Enable Module

When the readiness check is complete, do one of the following:

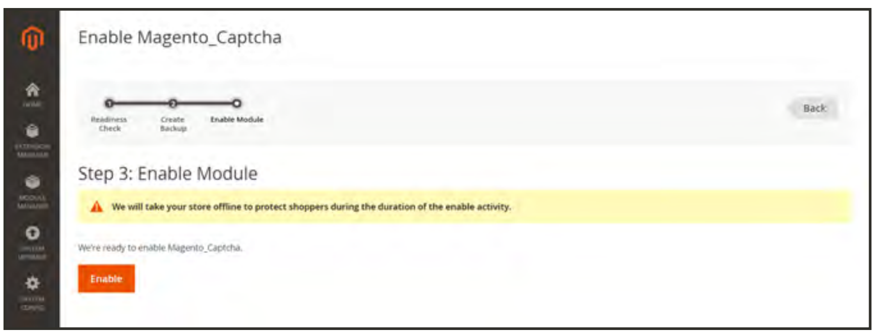
- Tap **Next**.
- Correct any issues, and **Try Again**.

b. Under **Step 2**, mark the checkbox of each **Backup Option** that you want to include. Then, tap **Create Backup**.

Create Backup

c. When the backup is complete, tap **Next**.

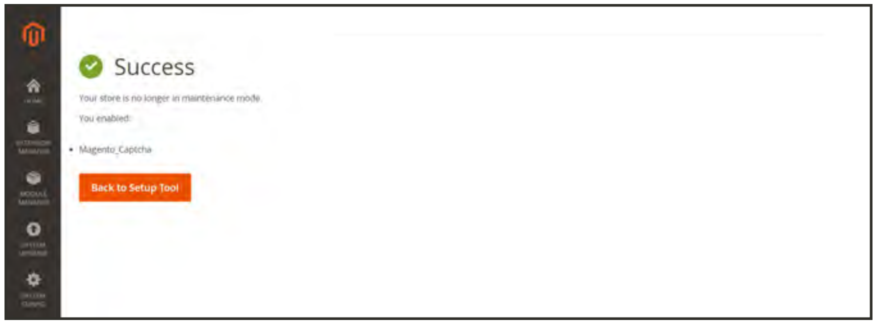
d. Under **Step 3**, tap **Enable**.



Enable Module

e. As the process is running, the details appear in the box below. To toggle the display of the log, tap **Console Log**.

f. When the **Success** page appears, the module is enabled and your store returns to production mode. Tap **Back to Setup Tool** to return to Module Manager.



Sucess

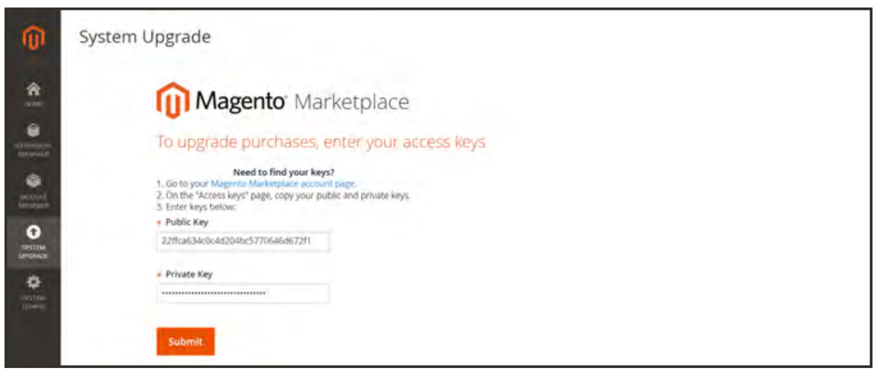
System Upgrade

The System Upgrade tool can be used to upgrade your Magento installation from the Admin. The upgrade is a three-step process that should take place during off-peak hours. Before upgrade takes place, your store is put into maintenance mode, checked for readiness, and backed up.

Upgrade Requirements

- Only the primary account holder is authorized to download code from the repository.
- The authorization keys that are used to download code must be generated from the primary account.
- The merchant or developer must submit a ticket to Support and request authorization for the download.

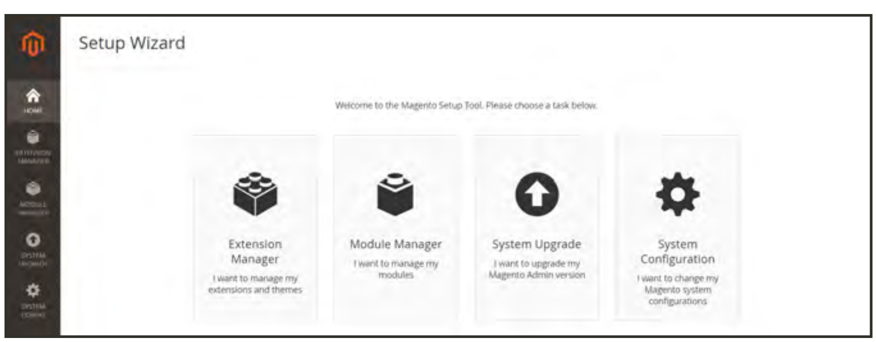
For technical information, see Run System Upgrade in the developer documentation.



System Upgrade

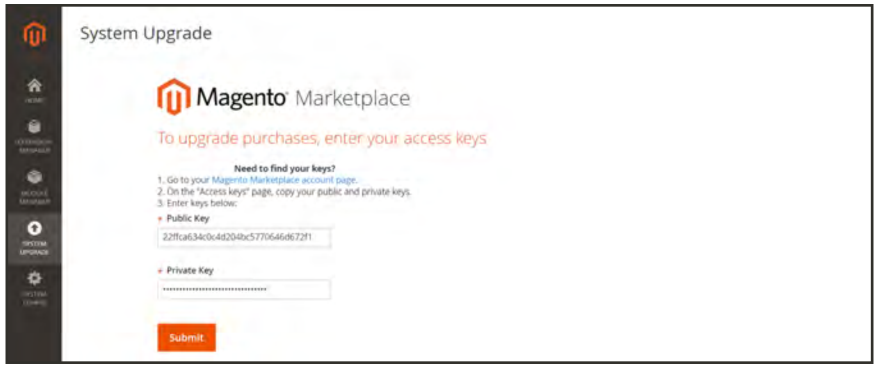
To upgrade your Magento installation:

1. Log in to the Admin of your Magento store as a user with full administrator rights.
2. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Web Setup Wizard**.



Web Setup Wizard

3. Tap **Extension Manager**.



System Upgrade

4. When prompted, follow the instructions to copy and paste the **Public Access Key** and **Private Access Key** from your Marketplace account. Then, tap **Submit**.

   To learn more, see Magento 2 Access Keys in the Marketplace User Guide.

5. Follow the onscreen instructions to complete the following steps:

   - Step 1: Select Version
   - Step 2: Create Backup
   - Step 3: System Upgrade.

System Config

The System Config page saves a copy of your public and private access keys that are used to synchronize your store with Magento Marketplace.

Magento Marketplace System Config

To synchronize your purchases:

1. Sign in to your **Magento Marketplace** account.
2. When prompted, follow the instructions to copy and paste the **Public Access Key** and **Private Access Key** from your Marketplace account. Then, tap **Submit**.

   To learn more, see Magento 2 Access Keys in the Marketplace User Guide.
3. When the process is complete, your credentials are saved.

Credentials Saved

CHAPTER 103:

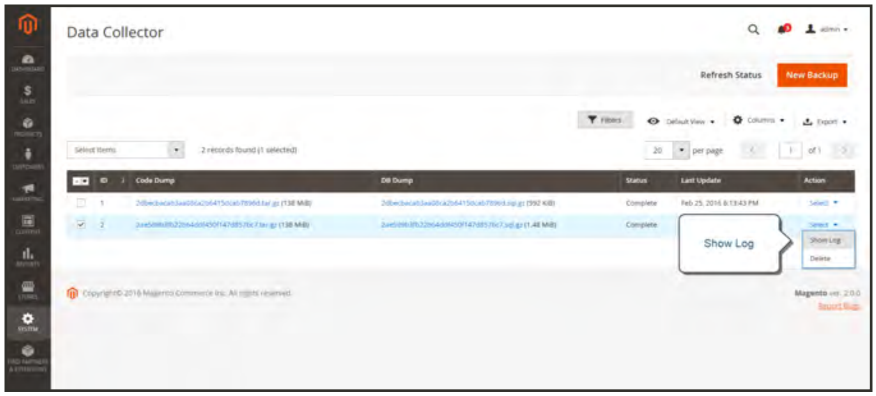
Support

The Support Tools are designed to identify known issues in your system. They can be used as a resource during the development and optimization processes, and as a diagnostic tool to help our support team identify and resolve issues.

- Data Collector
- System Reports

Data Collector

Data Collector gathers the information about your system that is needed by our Support team to troubleshoot issues with your Magento installation. The backup that is created takes several minutes to complete, and includes both a code and database dump. The data can be exported to a CSV or Excel XML file.

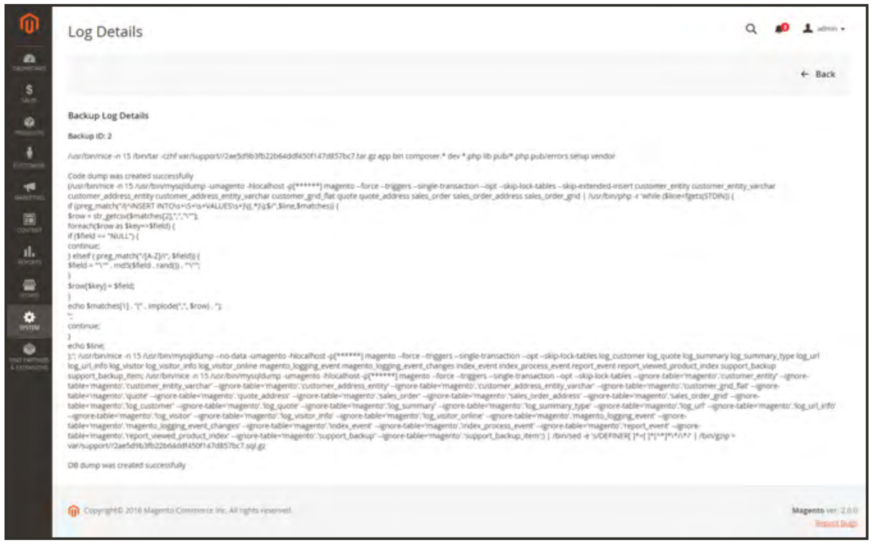


Data Collector

To run Data Collector:

1. On the Admin sidebar, tap **System**. Then under **Support** choose **Data Collector**.
2. In the upper-right corner, tap **New Backup**.

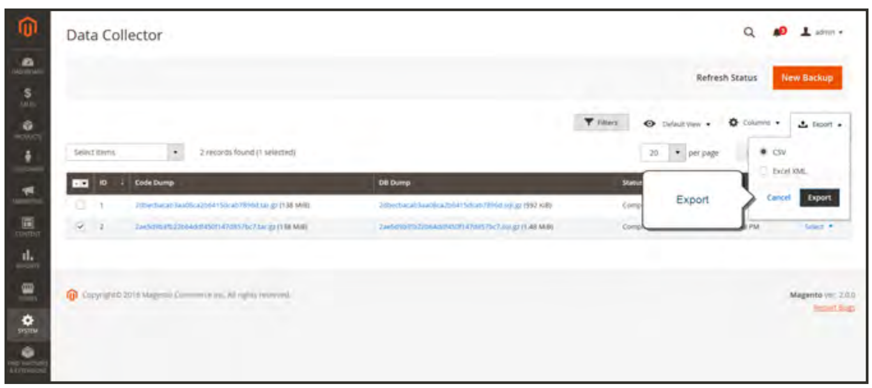
   It will take a few minutes to generate the backup. When complete, the backup appears in the Data Collector grid.
3. To view a log with the backup details, do the following:
   a. In the **Action** column, select **Show Log**.
   b. Click **Back** to return to the grid.



Log

To export backup data:

1. In the first column mark the checkbox of the backup to be exported.
2. On the **Export** menu, choose the format of the export data.



Export Format

3. Look for the download message at the bottom of the screen, and **Save** the file.

System Reports

The system reporting tool gives you the ability take periodic full, or partial, snapshots of the system, and save them for future reference. You can compare performance settings before and after code development cycles, or changes to server settings. The system reporting tool can dramatically reduce the time spent preparing and submitting the information required by Support to begin an investigation.

From the System Reports grid, you can view and download existing reports, delete reports, and create new reports.

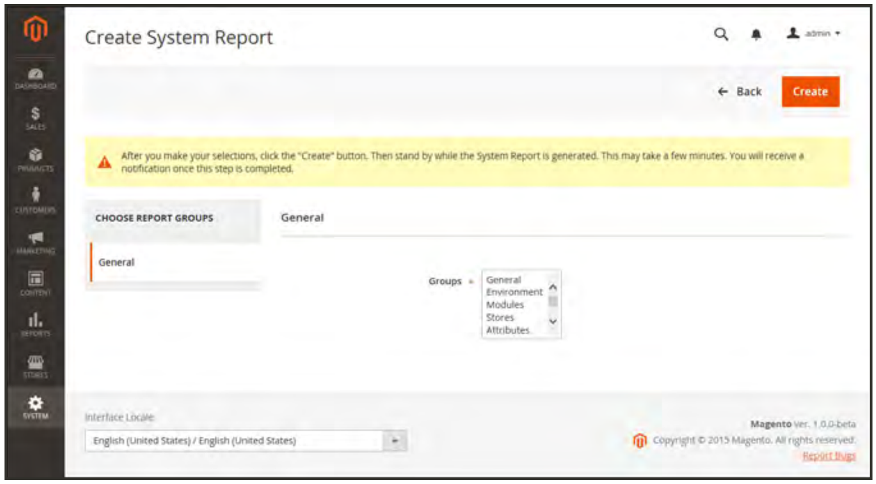
Manage System Reports

To access system reports:

1. On the Admin sidebar, tap **System**. Then under **Support**, choose **System Report**.
2. To generate a new system report, tap **New Report**. Then, do the following:
   a. In the **Groups** list, select each set of information that you want to include in the report. By default, all groups are selected.
   b. In the upper-right corner, tap **Create**.

   It might take a few minutes for the report to generate.
3. To view the report, click the **View** link at the end of the row.
4. To download a report, click the **Download** link at the end of the row.
5. To create a new report, click the **New Report** button. Then, do the following:

a. In the list, select the **Groups** of system information that you want to include in the report.



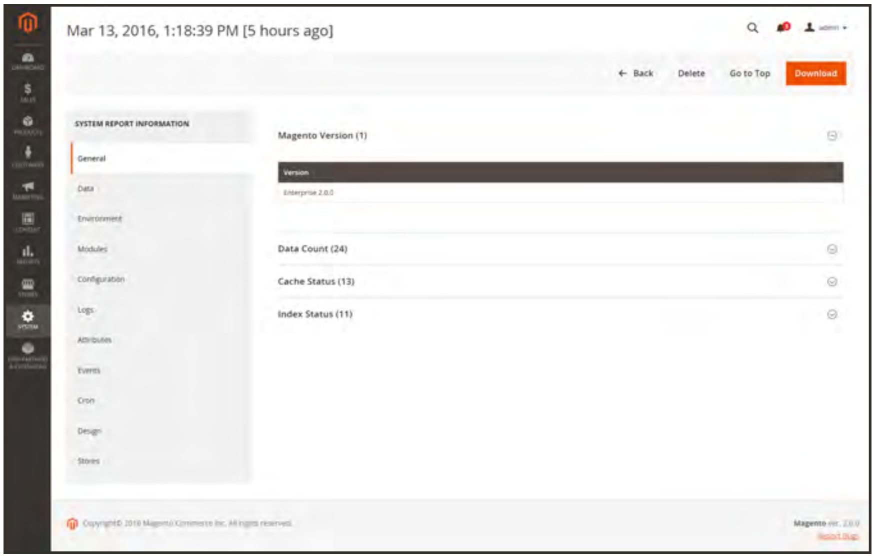
Select Groups

b. Tap **Create** to generate the report.

It might take a few minutes for the report to generate, depending on the number of report types selected. When the report is ready, it appears at the top of the grid with the date and time generated..

View System Report

6. In the **Action** column of the grid, select one of the following:
   - View
   - Delete
   - Download
7. In the panel on the left, expand each section of the report to view the detail.



General System Report Information

8. To save the report as an HTML file, tap **Download**. Then save the file to your computer.

9. To view the report, open the download file in a browser. In the header, tap the control to jump to a specific section of the report.

System Reports

REPORT GROUP	INFORMATION INCLUDED
General	Magento Version Data Count Cache Status Index Status
Environment	Environment Information MySQL Status
Modules	Custom Modules List Disabled Modules List All Modules List
Configuration	Configuration Data from app/etc/env.php Shipping Methods Payment Methods Payments Functionality Matrix
Logs	Log Files Top System Messages Today's Top System Messages Top Debug Messages Today’s Top Debug Messages Top Exception Messages Today's Top Exception Messages
Attributes	User Defined Eav Attributes New Eav Attributes Entity Types All Eav Attributes Category Eav Attributes Product Eav Attributes Customer Eav Attributes Customer Address Eav Attribute RMA Item Eav Attributes
Events	Custom Global Events Custom Admin Events Custom Frontend Events

System Reports (cont.)

REPORT GROUP	INFORMATION INCLUDED
	Customer Doc Events Custom Crontab Events Custom REST Events Custom SOAP Events Core Global Events Core Admin Events Core Frontend Events Core Doc Events Core Crontab Events 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
Design	Adminhtml Themes List Frontend Themes List
Stores	Website Tree Websites List Stores List Store Views List

Appendices

Contents

APPENDIX A:

Release Notes

Release notes provide a detailed description of each product release, with links to additional technical information, installation instructions, and support resources. For details about the most current and past releases, see Release Information.

As a best practice, we recommend that you keep your Magento installation up to date, so you can benefit from the latest features and advancements.

APPENDIX B:

Change Log

Our documentation is continually updated with new topics, clarifications, and corrections to existing content. The Change Log in the online user guide lists the major updates, organized by month. If you can't see the most recent changes, refresh your browser or clear the cache. Check back every now and then to see what's new!

Change Log

APPENDIX C:

Glossary

A

above the fold
The web page content that is immediately visible in the browser window; section of a page that is displayed without the need to scroll.

Admin
The password-protected back office of your store where orders, catalog, content, and configurations are managed.

alt text
The text that is displayed in place of an image when the user is unable to view the image.

anchor text
The visible text that is anchored to another page or page section; the literal text of a hyperlink.

API
Application Program Interface: A software interface that lets third-party applications read and write to a system using programming language constructs or statements.

aspect ratio
The proportional relationship between the width and height of an image.

attribute
A characteristic or property of a product; anything that describes a product. Examples of product attributes include color, size, weight, and price.

authorization
To give a service permission to perform certain actions or to access resources.

average inventory cost
Product price, less coupons or discounts, plus freight and applicable taxes. The average is determined by adding the beginning cost of inventory each month, plus the ending cost of inventory for the last month of the period.

B

B2B
Business to Business: A type of business transaction between two business entities that are not the final consumers of the goods or services.

B2C
Business to Consumer: Business transactions between a business entity and a consumer.

banner
Promotional graphics displayed either horizontally on the top of a web page or vertically on the left or right margins. Website advertisements are often displayed as banners.

base currency
The primary form of currency used in store transactions.

base currency rate
The base currency rate is the default for your store.

batch processing
To perform a task or make a change to multiple items all at once, without manual repetition.

bounce rate
The percentage of visitors to your site that leave without viewing any other pages.

brand
A unique identity that defines a particular product or group of products.

breadcrumb
A navigation aid that helps the user to keep track of their location within your store.

brick and mortar
A retail business with a permanent physical location, as opposed to being entirely virtual.

broken link
A hyperlink that fails to send the user to its intended web page.

C

callout
A term that is sometimes used to describe a block that is defined as a layout update using XML code.

canonical URL
The canonical meta tag redirects search engines to the correct URL, when seemingly duplicate content is encountered on the server.

capture
The process of converting the authorized amount into a billable transaction. Transactions cannot be captured until authorized, and authorizations cannot be captured until the goods or services have been shipped.

cardholder
A person who opens a credit card account and is authorized to make purchases.

cascading style sheet
The markup standard used to apply styles to HTML elements on the page.

category
A set of products that share particular characteristics or attributes.

CCV
Credit Card Verification code. (See CVV)

checkout process
The process of gathering the payment and shipping information that is necessary to complete the purchase of items in the shopping cart. In the final step, the customer reviews and places the order.

CMS
Content Management System: A software system that is used to create, edit, and maintain content on a website.

complex data
Data that is associated with multiple product options.

complex product
A product that requires the customer to choose from a selection of options.

composite product
Any product type that offers customers a choice of options.

Content Delivery Network
A large distributed network of servers that specializes in the high performance delivery of multi-media content.

content marketing
The art of promoting products or services by providing valuable information at no charge.

conversion
A marketing term that indicates a goal has been reached. If the goal is to sell a product, conversion is reached when a visitor to your site becomes a buyer.

conversion rate
The percentage of visitors who are converted into buyers.

credit memo
A document issued by the merchant to a customer to write off an outstanding balance because of overcharge, rebate, or return of goods.

CSS
Cascading Style Sheets: A style sheet language that controls the appearance of HTML documents; a way to control the appearance of text, graphics, lists, links, and all other elements on a web page.

CSV
Comma Separated Values: A type of file used to store data values which are separated from each other by commas.

CVM
Card Verification Method: A way to verify the identity of the customer by confirming a 3-digit or 4-digit credit card security code with the payment processor.

CVV
The Card Verification Value, also known as the Card Security Code, provides an additional level of security for online transactions.

D

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 tag
A snippet of code that can be used to add functionality or content to a page.

media storage
A dedicated space on the content delivery network for your store's assets.

merchant account
An account with a bank or financial institution that makes it possible to accept credit card transactions.

meta tags
Information in a web page that is not displayed on the page itself, but is used by search engines to determine the page title, description, and page keywords.

N

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.

price markup
: A percentage added to the cost of an item to determine the retail price.

privacy policy
: A document that explains the merchant's policies for handling customer information.

purchase order (PO)
: A written sales contract between a buyer and seller that describes the merchandise or service to be purchased from a vendor.

R

redirect
: A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

relative link
: A hyperlink that includes only the address of the linked page that is relative to the linking page, rather than the full URL.

return policy
: A document that explains the merchant's rules regarding the return of products by customers.

robots.txt
: A file placed on a website that tells search engine crawlers which pages not to index.

RSS feed
: Really Simple Syndication: A technology that creates web content syndication and allows web users to subscribe to product feeds, websites, and blogs.

S

SaaS
: Software as a Service: A software delivery model where the vendor provides the software and hosting environment, and customers pay for the service by subscription or per use.

Sass/Compass
: A CSS pre-compiler that provides organizable, reusable CSS.

security certificate
: Information that is used by the SSL protocol to establish a secure connection.

SEO
Search Engine Optimization: The process of improving a website's search engine rankings in order to increase valued visitors.

SERP
Search Engine Results Page

settlement
Settlement occurs when the acquiring bank and the issuer exchange funds and the proceeds are deposited into the merchant account.

shipping carrier
A company that transports packages. Common carriers include UPS, FedEx, DHL, and USPS.

shopping cart
A grouping of products that the customer wishes to purchase at the end of their shopping session.

sidebar
The right or left column of a two-column page layout.

sitemap
A page that provides search engines with an efficient, alternate route through your site.

SKU
Stock Keeping Unit: A number or code assigned to a product to identify the product, options, price, and manufacturer.

splash page
A promotional page with a product or advertisement; normally displayed before the home page.

SSL certificate
A validation and security mechanism that identifies the merchant and encrypts credit card and other sensitive information.

static block
A fixed content block that can be displayed on various content pages in a store.

static content
Content that does not change frequently. See also dynamic content.

static files
The collection of assets, such as CSS, fonts, images, and JavaScript that is used by a theme.

T

theme
A package that contains graphics and appearance information, and customizes the look and feel of the store.

transactional email
A notification email sent to the customer when a transaction is processed.

transactional emails
An automated email message that is sent in response to a specific event or transaction.

U

URL
Uniform Resource Locator: The unique address of a page on the internet.

usability
Refers to the degree to which a product or service is easy to use by its customers.

W

widget
A prepared snippet of code that adds functionality and/or dynamic effects to your store.

WYSIWYG
What You See Is What You Get: An editor that displays formatted text as it will appear in its final published form.

X

XML
Extensible Markup Language: A markup format derived from SGML that it used to format information for publication and distribution.

APPENDIX D:

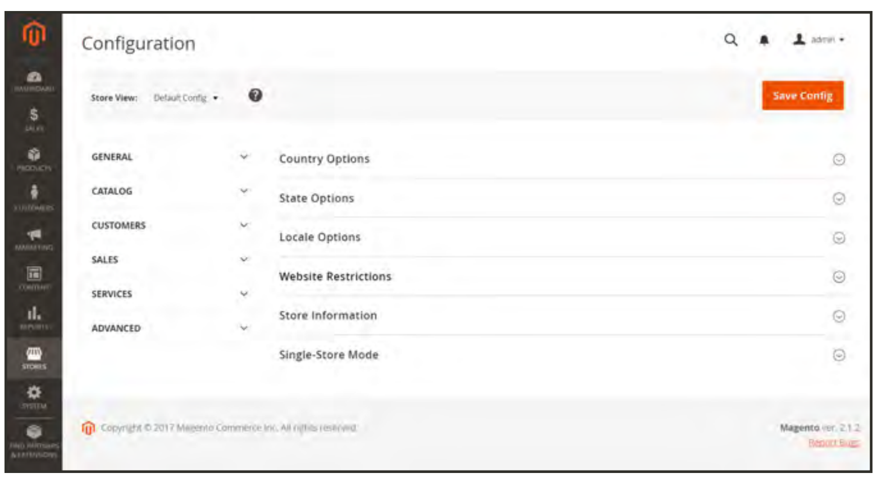
Configuration Reference

This reference has field descriptions for every configuration setting in Magento Commerce. To learn how to apply configuration settings to specific store views, see: Scope.

From the HTML version of the guide, you can drill down through any section of the reference, and follow the links to corresponding topics in the user guide. From step-by-step instructions, click any linked caption below a screenshot to jump to the field descriptions.

Follow these links for the corresponding section in the online reference:

- General
- Catalog
- Customers
- Sales
- Dotmailer
- Services
- Advanced



Configuration

Index

C

E

G

N

O

P

Q

R

S

V

W

X

Y

Z