

Magento
Community Edition
User Guide



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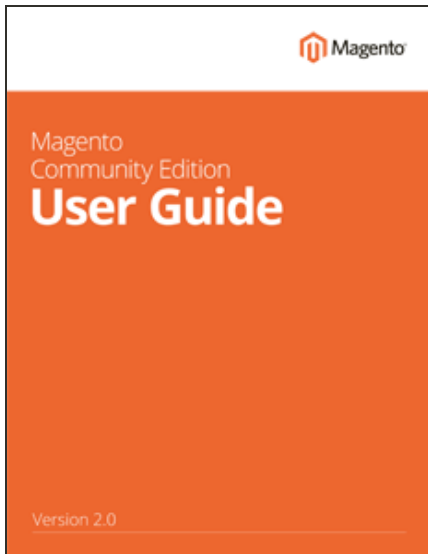
About this Guide

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



Online User Guide

The online guide is the primary user documentation for the current release of Magento Community Edition 2.0. The content is continually updated to provide you with the best possible assistance. To learn about recent additions or changes to existing topics, see the [Change Log](#) in the appendix of this guide.



PDF User Guide

You’ll find the same great information in both the online (HTML) and offline (PDF) user guides, so you can use the format you prefer. Simply click the link to open the PDF in your browser. You can also right-click the download link to save the file to your computer. The [Documentation Archive](#) in the appendix of this guide will eventually have PDF download links for every major version of the product.

GETTING STARTED

Introduction

Basic Configuration

Introduction

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

Welcome

- Resources

- Join the Conversation!

About This Release

- System Requirements

- Installation

 - Prelaunch Checklist

 - Your Login Credentials

 - For Your Records

Your Magento Account

- Creating a Magento Account

- Sharing Your Account

Quick Tour

- Path to Purchase

 - Home Page

 - Catalog Page

 - Search Results

 - Product Page

 - Shopping Cart

Customer Journey

 - Attract New Customers

 - Engage Your Customers

 - Moment of Purchase

 - Increase Average Order Value

 - Customer Retention

 - Loyalty & Advocacy

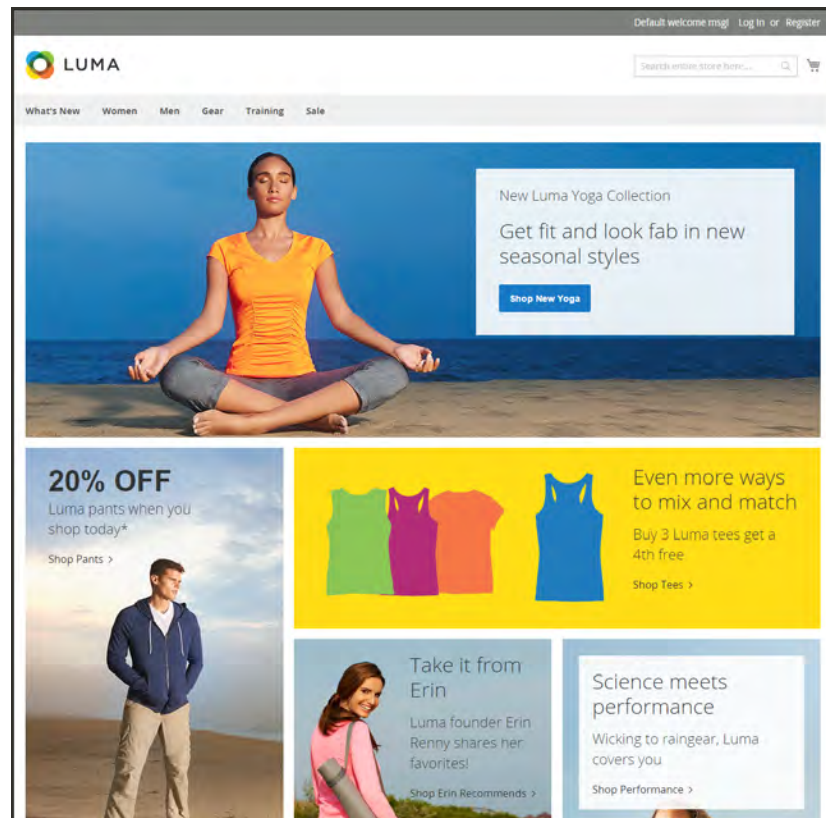
 - Success!



CHAPTER 1:

Welcome

Welcome to the next generation of the world's leading digital commerce platform! Built on open-source technology, Magento Community Edition 2.0 provides online merchants with unparalleled flexibility and control over the look, content, and functionality of their online stores. Magento's intuitive Admin features powerful marketing, search engine optimization, and product management tools that give you the power to create sites that are tailored to your unique business needs. Robust and scalable, Magento 2.0 offers you a stable, secure, and customizable solution for your growing business.



Home Page

Resources

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



Product Documentation

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



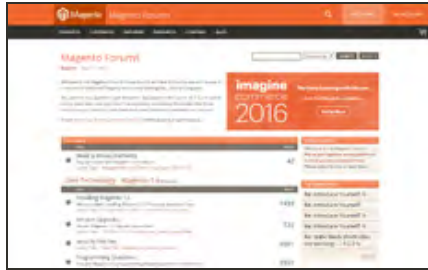
Commerce Resources

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



Security Center

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



Forums

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



Blog

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



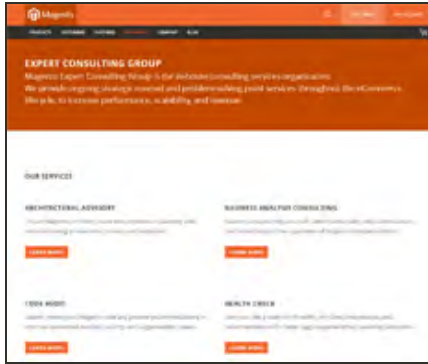
Training & Certification

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.

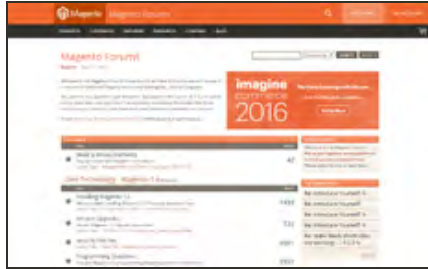


Expert Consulting Services

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.



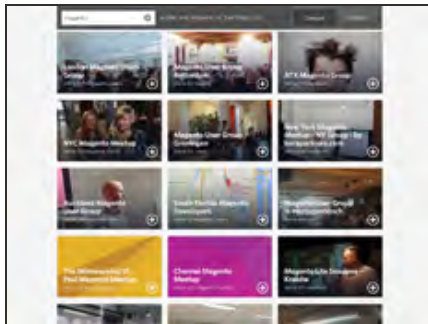
Google+

Add us to your circle on Google+.



YouTube

Learn while you watch videos on our YouTube channel!



Meetup

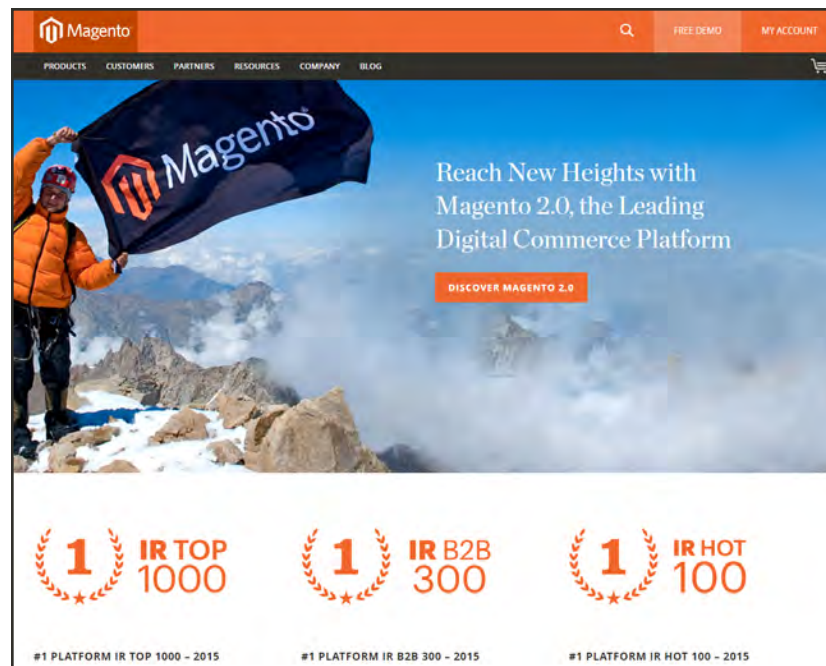
Find a Magento Meetup near you!



CHAPTER 2:

About this Release

We are pleased to present Magento Community Edition 2.0.4. This release includes functional fixes and performance enhancements, and addresses several security issues. To learn more, see the [Release Notes](#) in the Magento developer documentation.



World's Leading Digital Commerce Platform

System Requirements

For more information, see [System Requirements](#) in the Magento 2.0 developer documentation.

SYSTEM REQUIREMENTS

ENVIRONMENT

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

Required extensions:

`bc-math` (Enterprise Edition only)
`curl`
`gd`, [ImageMagick 6.3.7](#) (or later) or both
`intl`
`mbstring`
`mcrypt`
`mhash`
`openssl`
`PDO_MySQL`
`SimpleXML`
`soap`
`xml`
`xsl`
`zip`

Optional, but recommended

SYSTEM REQUIREMENTS

`opcache` This extension is bundled in many PHP distributions. To verify, see: [CentOS](#) or [Ubuntu](#).

`php_xdebug2.2.0` Recommended for development environments only.
or later

Additional configuration:

`safe_mode` off

`memory_limit` minimum 512 MB

Database	MySQL 5.6.x (Oracle or Percona) Magento Enterprise Edition 2.0 can use three master databases to provide scalability for the different functional areas of checkout, orders, and product data.
SSL	A valid security certificate is required for HTTPS. Self-signed certificates are not supported.
Mail Server	Mail Transfer Agent (MTA) or SMTP server

SUPPORTED APPLICATIONS

Reverse Proxy / Web Accelerator	Varnish 3.5 Varnish 4.x (or latest stable version.)
Cache Storage	Redis 3.x Memcache 1.4.x
Session Storage	memcached latest stable version for session storage with either memcache or memcached PHP extensions (latest stable version)
Search	Apache Solr (Enterprise Edition only)
Messaging	RabbitMQ (Enterprise Edition only)

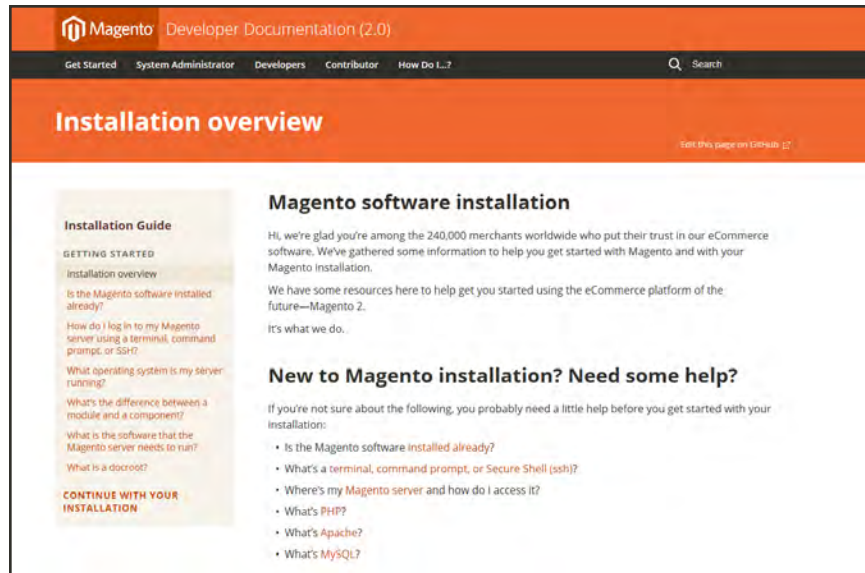
SUPPORTED BROWSERS

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

* The version before the most current.

Installation

To install Magento 2 on your server, see the [Installation Guide](#) in our technical documentation. For an overview of the second part of the installation process, see [Web Setup Wizard](#) in the System Operations section of this guide.



Installation Guide

Prelaunch Checklist

After you complete the design, development, and testing of your store, check the following configuration settings to make sure everything is correct before the store “goes live.” For a 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

Magento Version:

Encryption Key:

Database Name:

Database User Name:

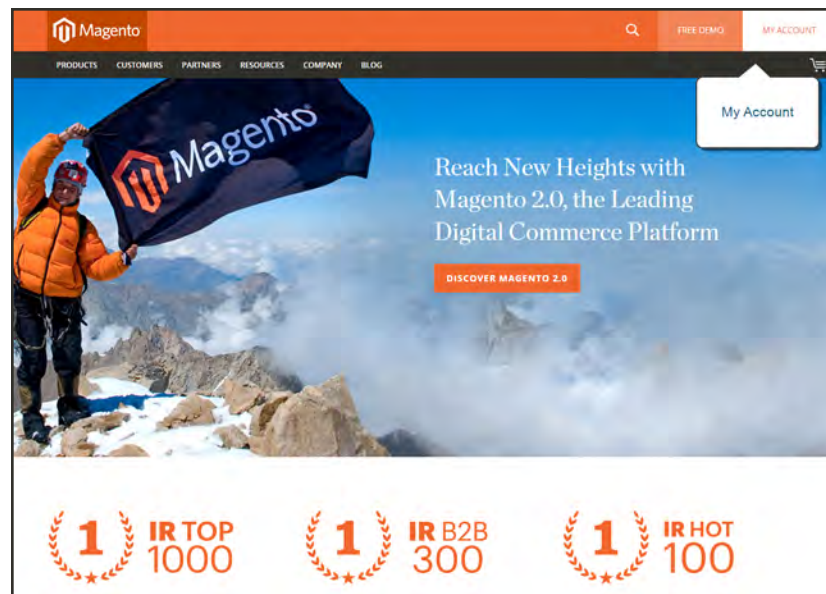
Database Password:



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.



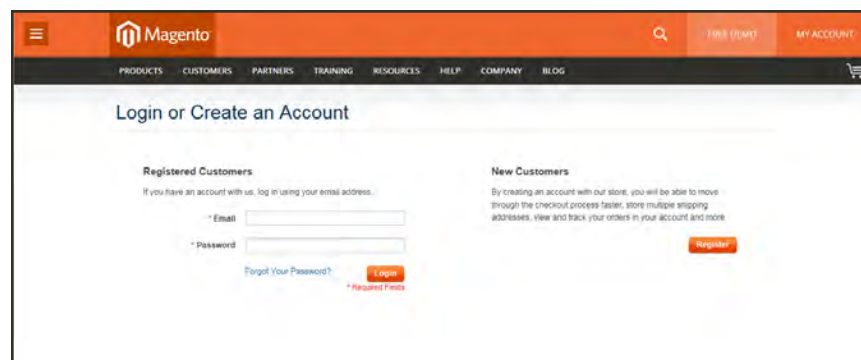
Your Magento Account

Creating a Magento Account

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

To create a Magento account:

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



Log In to Your Account

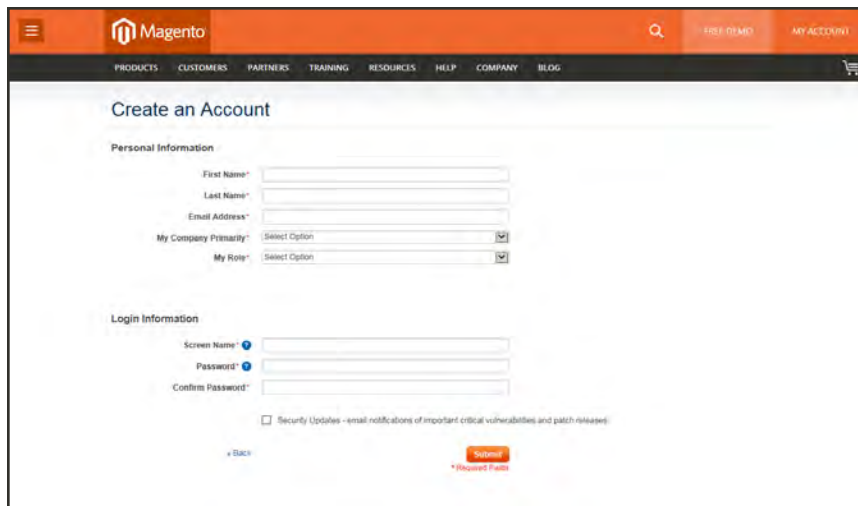
3. Under Personal Information, do the following:
 - a. Enter your **First Name**, **Last Name**, and **Email Address**.
 - b. Set **My Company Primarily** to the best description of what your company does. Then, set **My Role** to the best description of what you do for the company.
4. Under Login Information,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

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

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

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

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

The image shows a screenshot of the Magento website's 'Create an Account' page. The page has an orange header with the Magento logo and navigation links like 'PRODUCTS', 'CUSTOMERS', 'PARTNERS', 'TRAINING', 'RESOURCES', 'HELP', 'COMPANY', and 'BLOG'. The main content area is titled 'Create an Account' and is divided into two sections: 'Personal Information' and 'Login Information'. The 'Personal Information' section includes fields for 'First Name', 'Last Name', 'Email Address', 'My Company Primary' (a dropdown menu), and 'My Role' (a dropdown menu). The 'Login Information' section includes fields for 'Screen Name', 'Password', and 'Confirm Password'. There is a checkbox for 'Security Updates - email notifications of important critical vulnerabilities and patch releases'. At the bottom, there is a '+ Back' link and a 'Submit' button with a red asterisk indicating a required field.

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**.

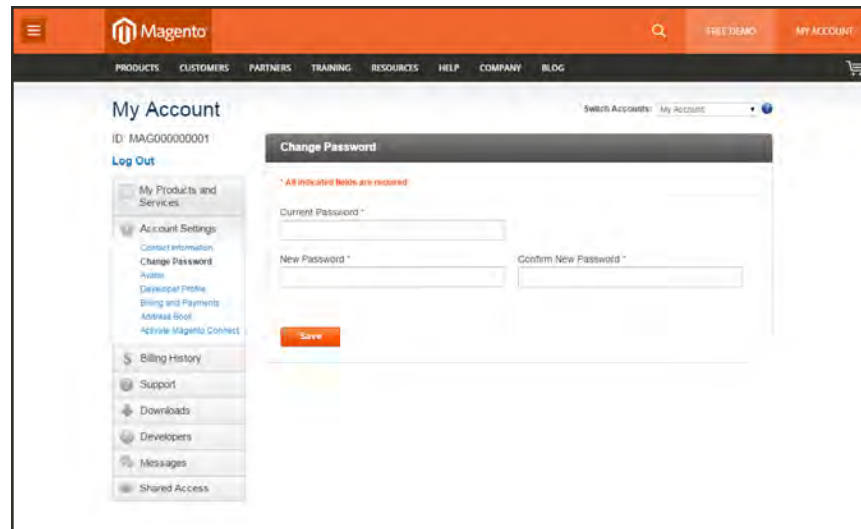
To receive a new password:

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

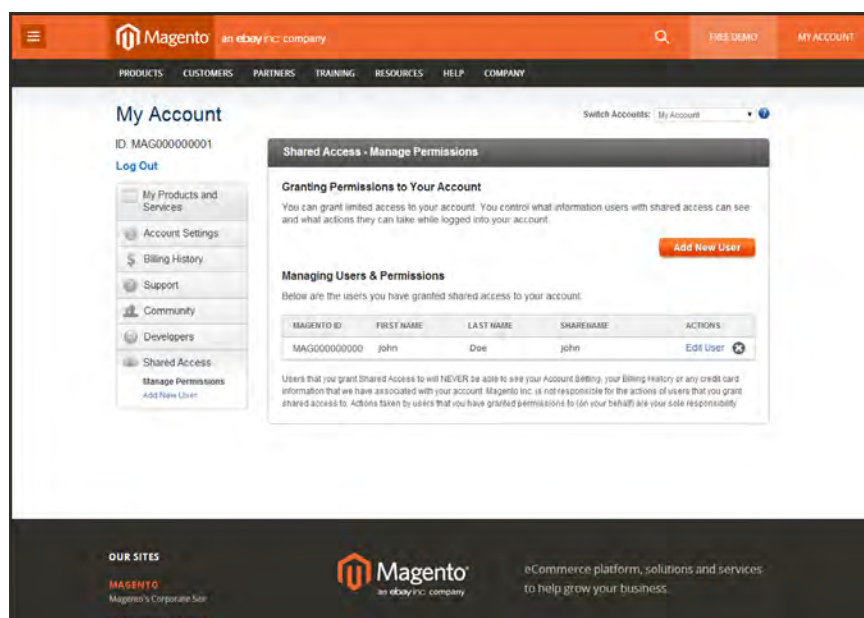


Change Password

Sharing Your Account

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

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



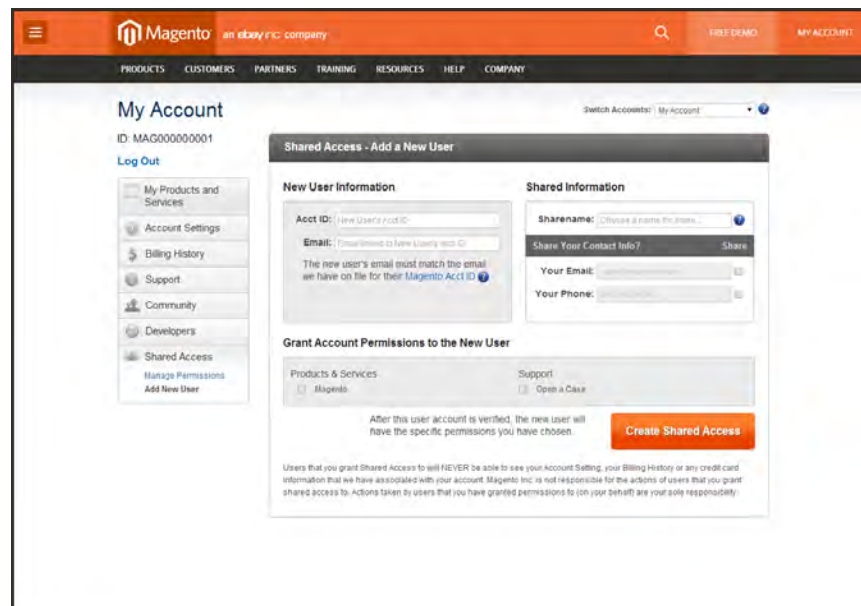
Shared Access

To set up a shared account:

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

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

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

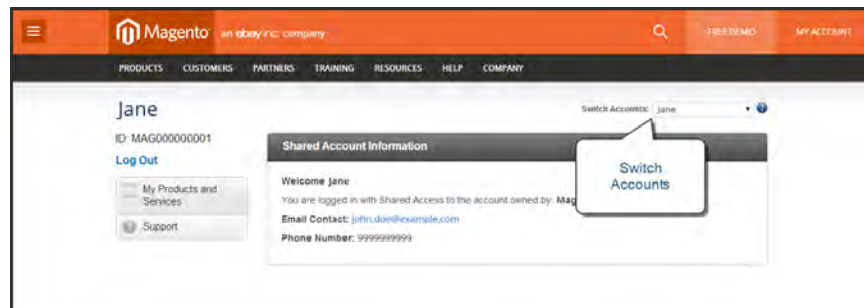


Add a New User

To access a shared account:

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

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



Switch Accounts

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



CHAPTER 4:

Quick Tour

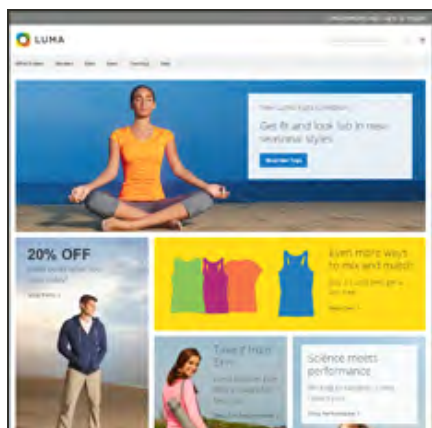
In this quick tour, we'll take a look at each page that customers usually visit while shopping in your store. The path that customers follow that leads to a sale is sometimes called the “path to purchase.” Then, we'll take a look at the major landmarks along the journey, and how Magento Community 2.0 can be used to attract and engage customers, increase the average order, and to build loyalty and advocacy.



Customer Journey

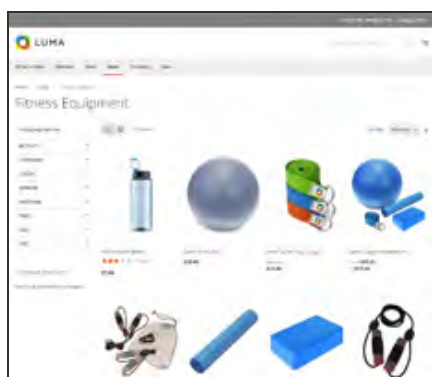
The Path to Purchase

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



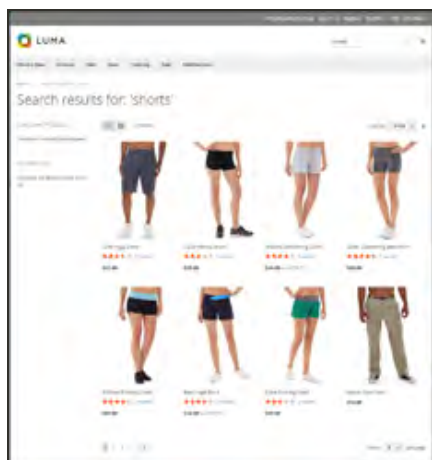
Home Page

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



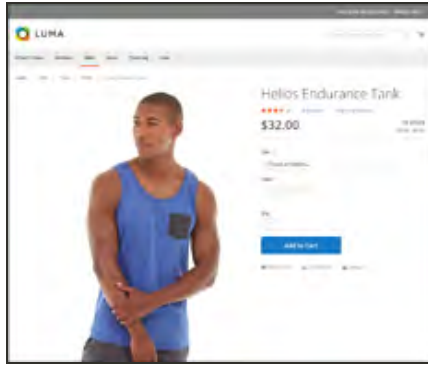
Catalog Page

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



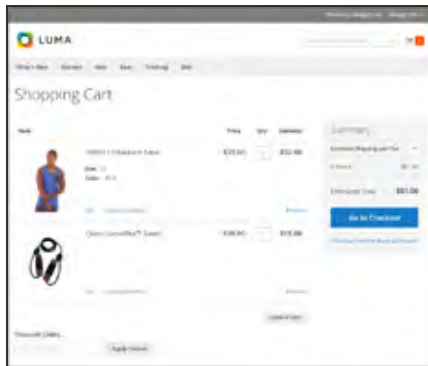
Search Results

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



Product Page

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



Shopping Cart

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

Home Page

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

Callouts

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



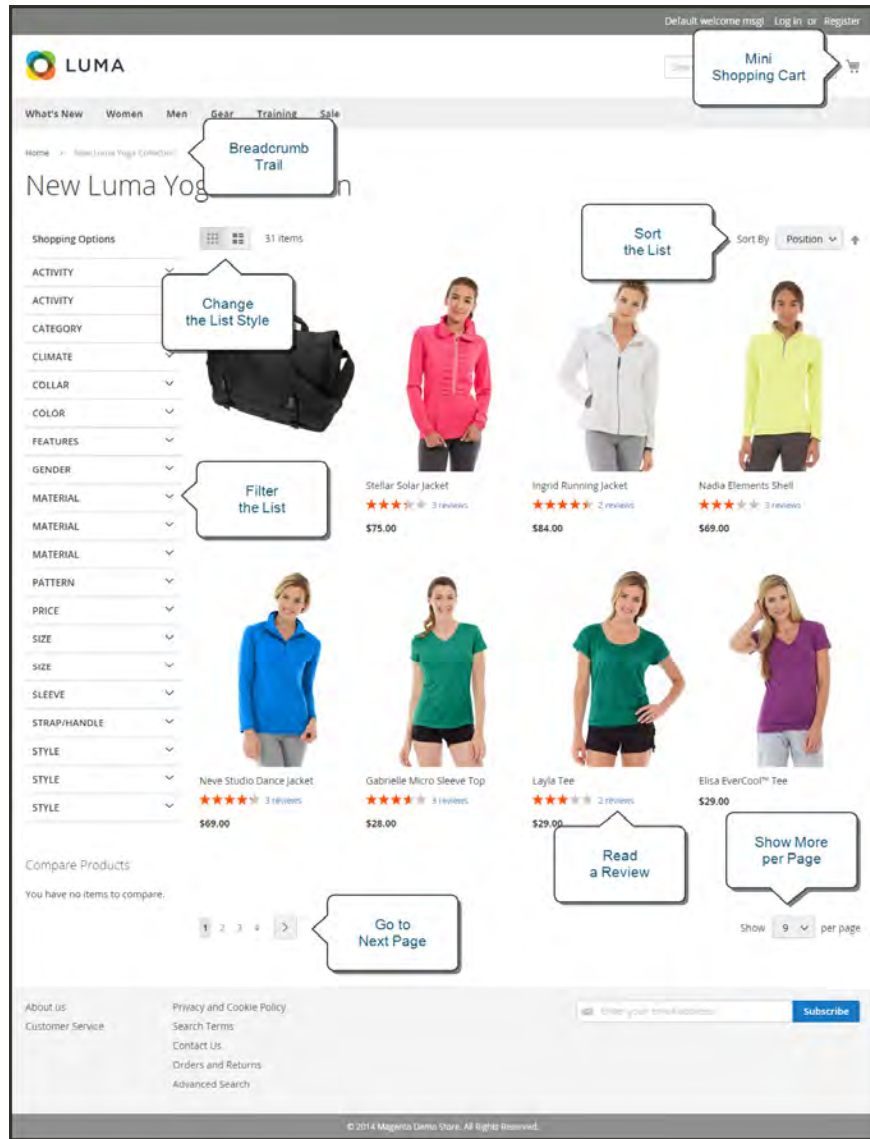
Home Page

Catalog Page

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

Callouts

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



Catalog Page

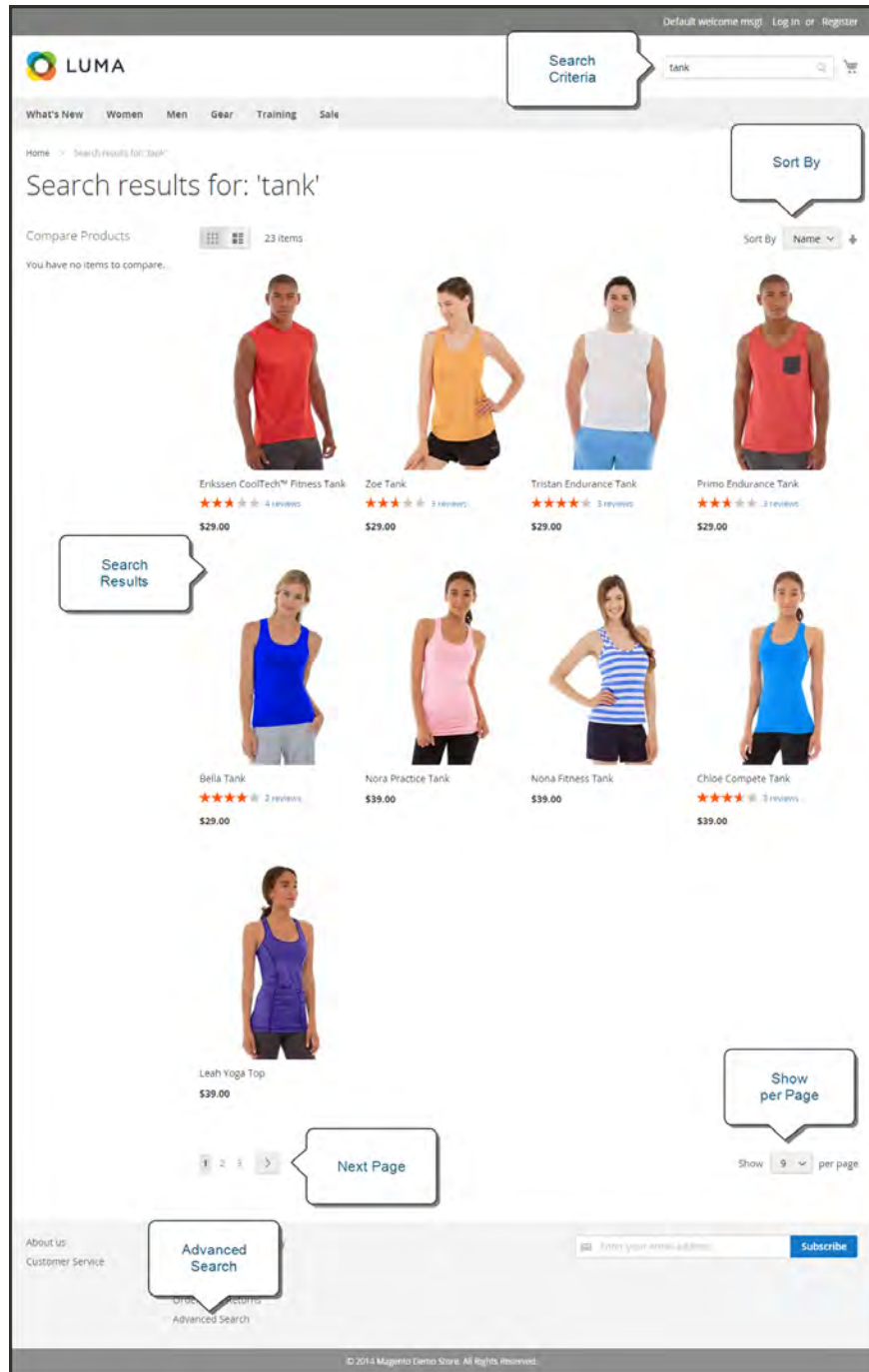
Search Results

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

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

Callouts

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



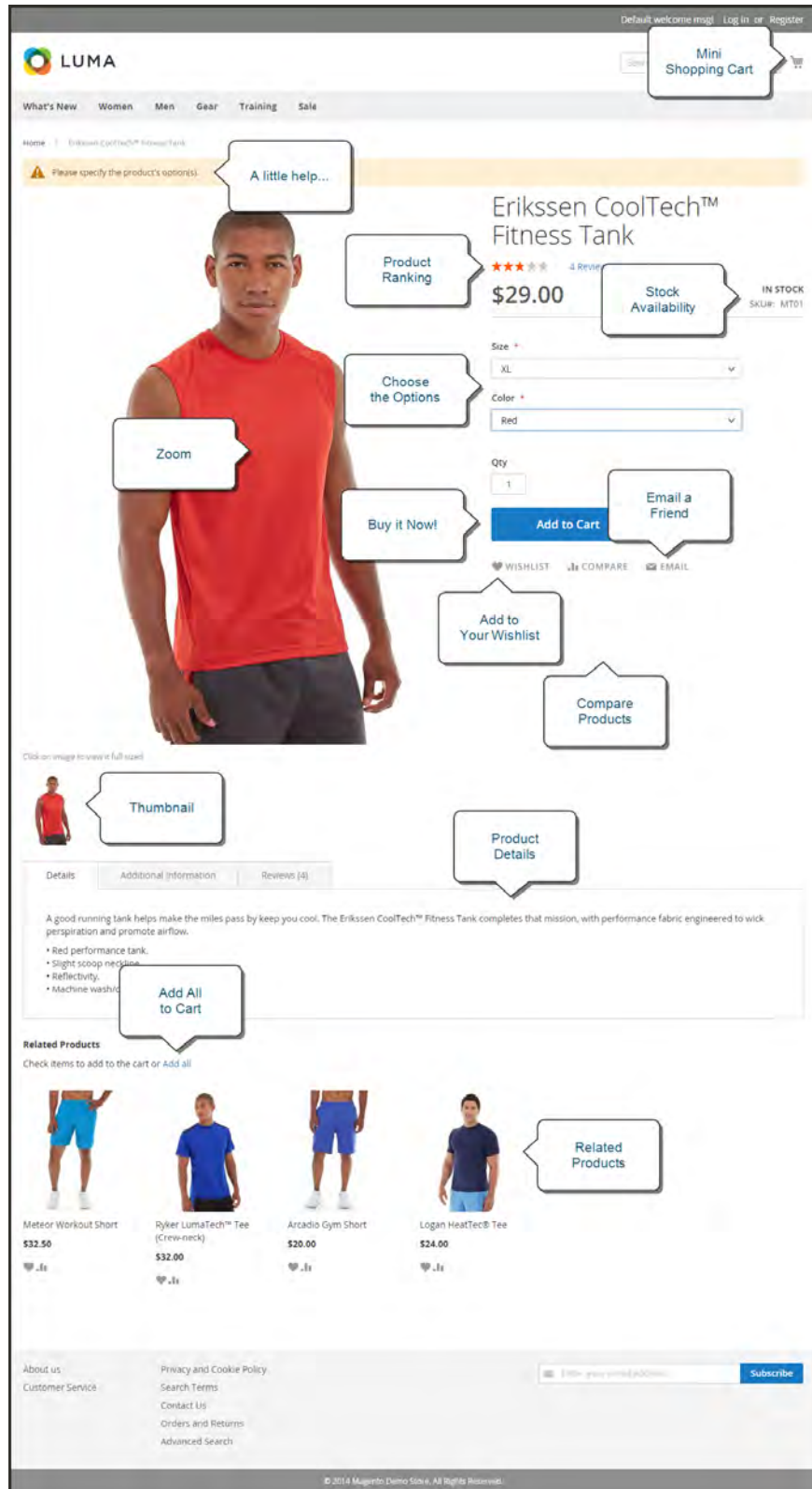
Search Results Page

Product Page

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

Callouts

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



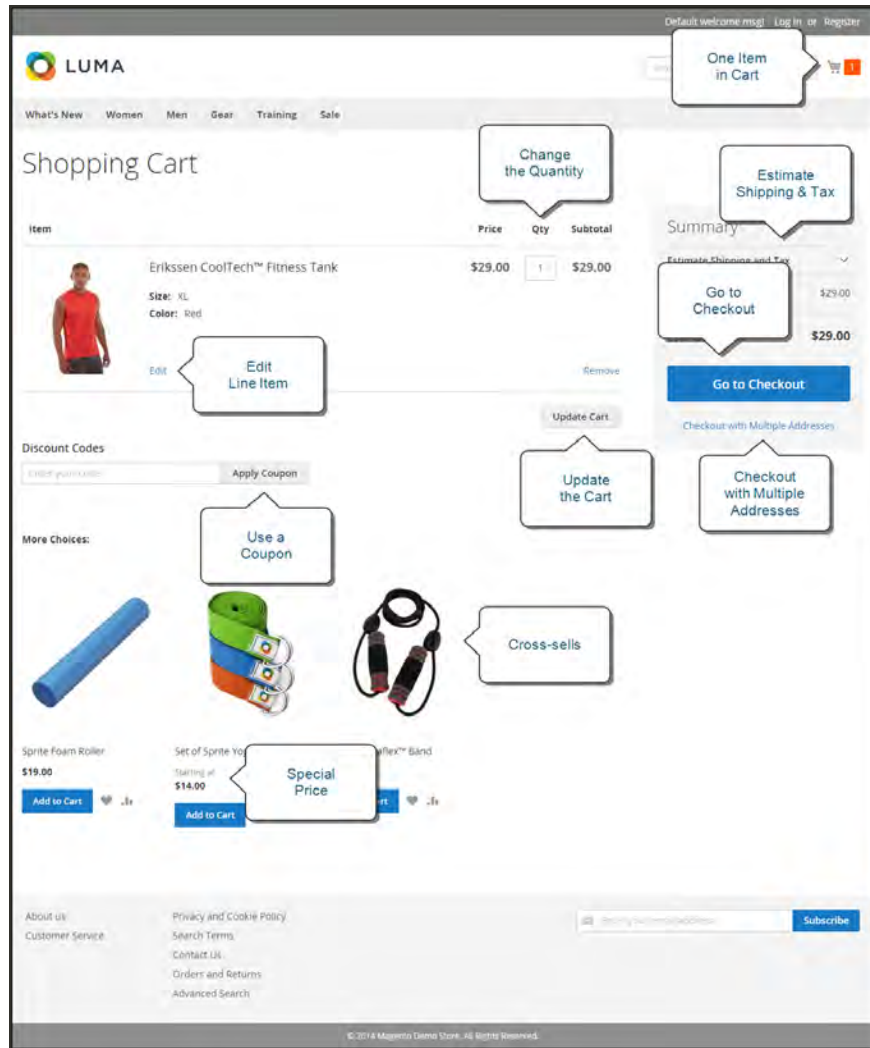
Product Page

Shopping Cart

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

Callouts

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



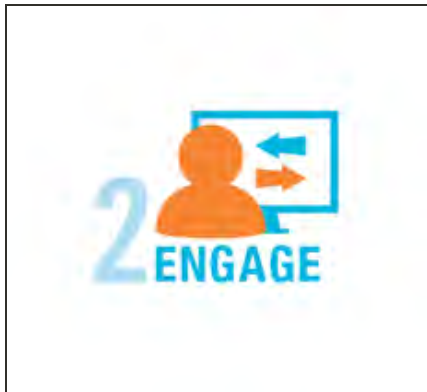
Shopping Cart Page

Customer Journey



Attract New Customers

Magento Community Edition 2.0 includes SEO functionality out of the box. Improve your search ranking and attract the most visitors to your site.



Engage Your Customers

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



Increase AOV

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



Moment of Purchase

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



Customer Retention

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



Loyalty & Advocacy

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

Attract New Customers

Magento Community Edition 2.0 is packed with features that make it easy to create a “search engine friendly” websites and increase the likelihood of bringing the right customers to your site.

Search Engine Optimization

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

Custom URLs

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

Meta Data

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

Sitemap

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

Analytics

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

Engage Your Customers

Magento Community Edition 2.0 makes it easy to create a customized, engaging site experience. Encourage your customers to spend more time exploring your site, and give them the tools to make it easy to find what they want faster.



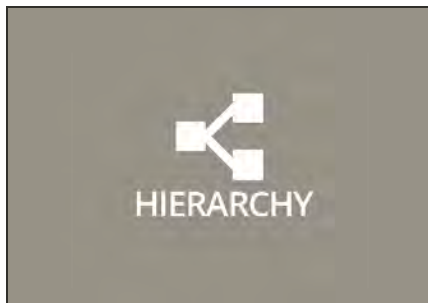
Content Management

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



Design & Theme

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



Multiple Stores, Sites & Views

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



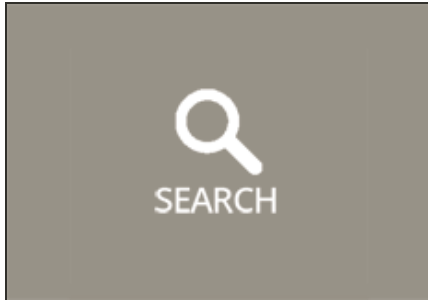
Multiple Devices

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



Shopping Tools

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



Sophisticated Search

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

Moment of Purchase

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

Order Processing

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

Shipping Labels

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

Multiple Shipping Options

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

Multiple Payment Options

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

PayPal Merchant Solutions

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

Shopping Assistance

Assisted shopping makes it easy for customer service reps to create orders for customers.

Security

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

Increase Average Order Value

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

Promotions

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

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.

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.

Customer Retention

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



Custom Coupons

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



Newsletters

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



RSS Feed

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

Loyalty & Advocacy

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

Dashboard Snapshots

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

Customer Accounts

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

Advocacy Tools

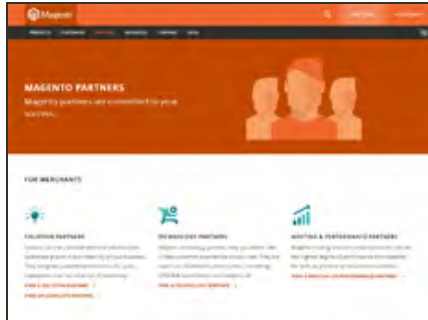
Customers who share their wishlists with family and friends make a powerful endorsement of your brand. Customers create these personalized lists from products they choose. When shared by email or RSS feed, these simple lists become powerful advocacy tools.

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.



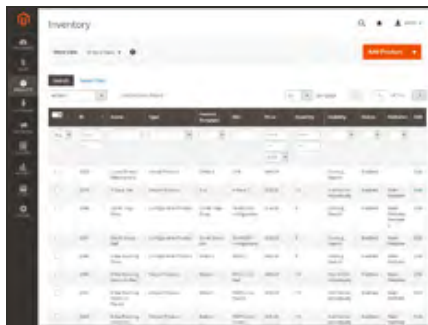
Implementation

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



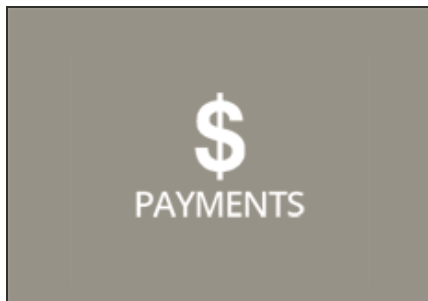
Design

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.

Basic Configuration

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.

Contents

Store Admin

- Your Admin Account

- Admin Sidebar

- Admin Workspace

 - Dashboard

 - Message InBox

 - Global Search

 - Grid Controls

 - Actions Control

Store Details

- Store Information

- Locale Options

- State Options

- Country Options

- Merchant Location

- Currency

- Store Email Addresses

- Contact Us

Storefront Branding

- Uploading Your Logo

- Uploading a Favicon

- Welcome Message

- Store Demo Notice

- Copyright Notice

Websites, Stores & Views

- Configuration Scope

- Single Store Mode

Industry Compliance

- PCI Compliance

- Privacy Policy

- Cookie Law Compliance

- Cookie Restriction Mode

- Cookie Reference



CHAPTER 5:

Store Admin

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

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](#).

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

Admin Sign In

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



Admin Sign In

To sign in to the Admin:

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

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

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

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

To reset your password:

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



Forgot Password

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

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

To sign out of the Admin:

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




Sign Out

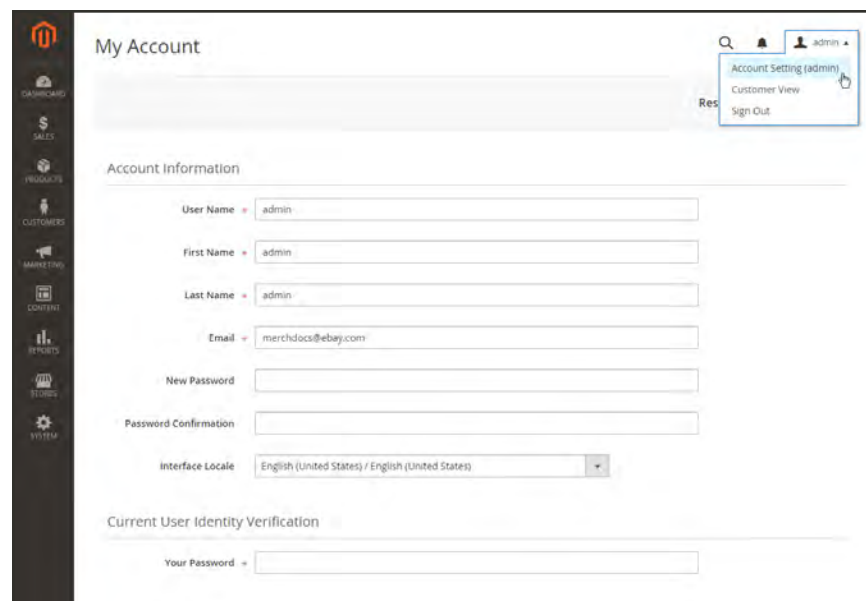
The Sign-In page returns, with a message that you are logged out. It's always a good idea to sign out of the Admin whenever you leave your computer unattended.

Your Admin Account

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

To edit your account information:

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



My Account

Account Information

User Name → admin

First Name → admin

Last Name → admin

Email → merchdocs@ebay.com

New Password

Password Confirmation

Interface Locale → English (United States) / English (United States)

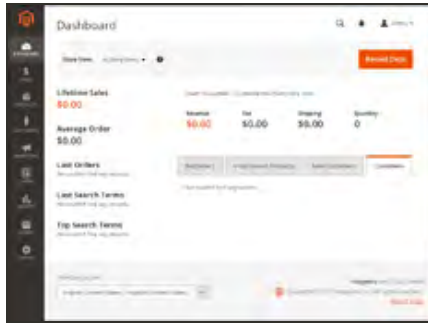
Current User Identity Verification

Your Password →

Account Information

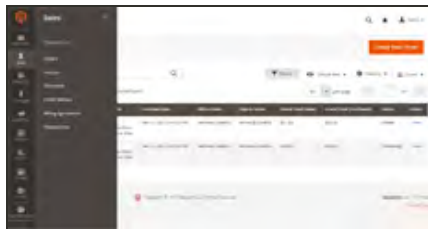
Admin Sidebar

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



Dashboard

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



Sales

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



Products

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



Customers

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



Marketing

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



Content

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



Reports

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



Stores

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



System

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

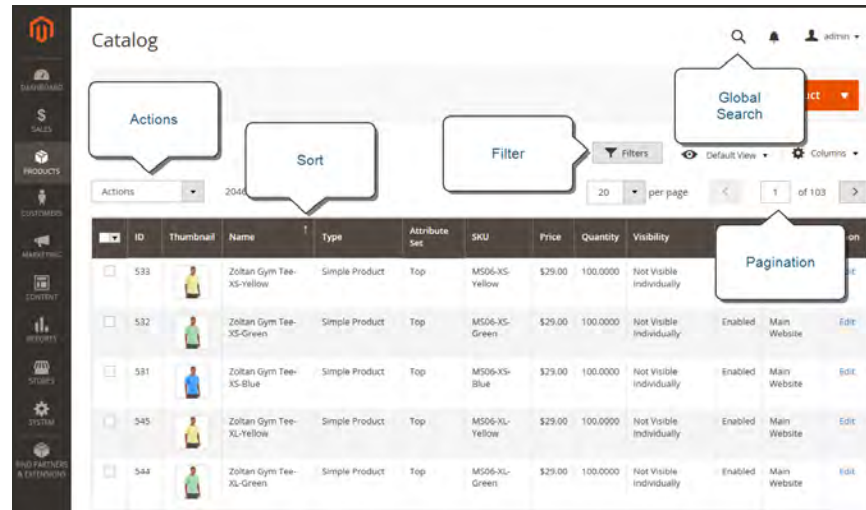


Find Partners & Extensions

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

Admin Workspace

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



Admin Workspace

Workspace Controls

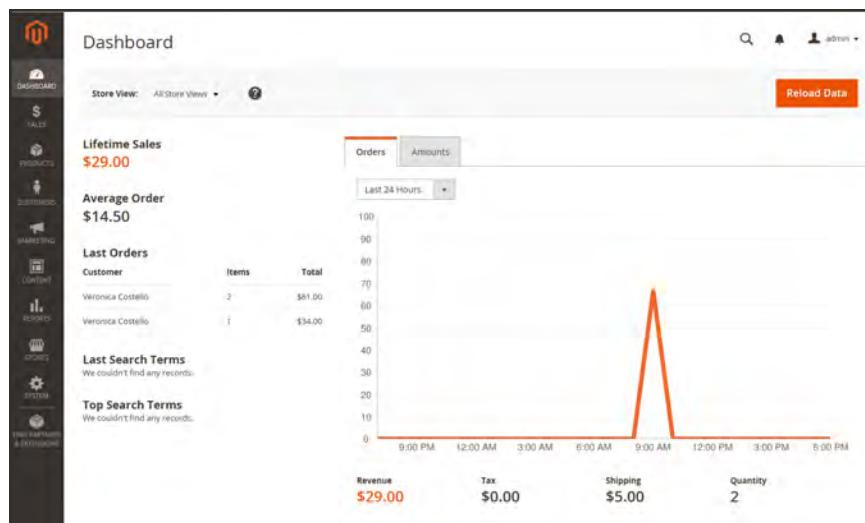
CONTROL	DESCRIPTION
Search	The Global Search box can be used to find any value in the database, including product, customer, and order records.
Sort	The header of each column can be used to sort the list in ascending or descending order.
Filter	The filters in the header of each column can be used to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

Dashboard

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

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

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



Dashboard

To configure the chart:

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

Enable Charts

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



The screenshot shows a 'Dashboard' settings panel. In the center, there is a label 'Enable Charts' followed by a dropdown menu currently set to 'Yes'. To the right of the dropdown is a '[GLOBAL]' label. A close button (⊘) is visible in the top right corner of the panel.

Dashboard

Set the Beginning Dates

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



The screenshot shows a 'Dashboard' settings panel. It contains two main sections. The first section is labeled 'Year-To-Date Starts' and has two dropdown menus, both set to '01'. The second section is labeled 'Current Month Starts' and has a dropdown menu set to '01'. Below this dropdown is the text 'Select day of the month:'. To the right of each section is a '[GLOBAL]' label. A close button (⊘) is visible in the top right corner of the panel.

Dashboard

Choose the Data Source

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

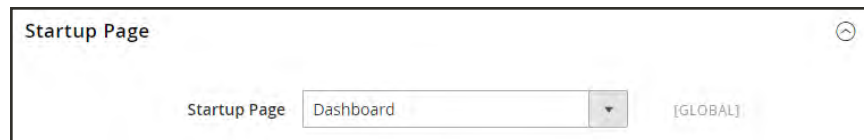
1. In the panel on the left, tap to expand **Sales**. Then, choose **Sales**.
2. Tap to expand the **Dashboard** section, and do the following:
 - For real-time data, set **Use Aggregated Data (beta)** to “Yes.”
 - For historical data, set **Use Aggregated Data (beta)** to “No.”



Dashboard

Change the Startup Page

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



Startup Page

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

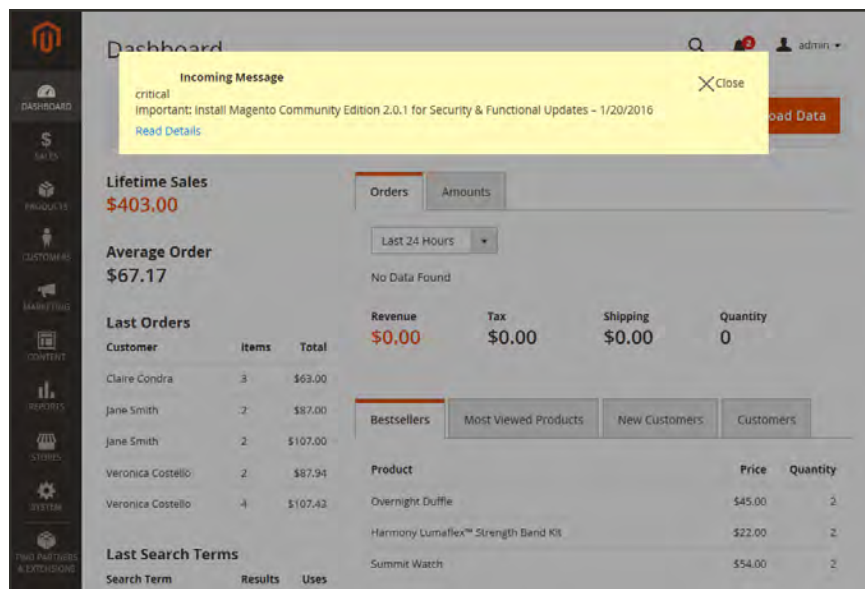
Dashboard Reports

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

Message Inbox

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

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



Incoming Message

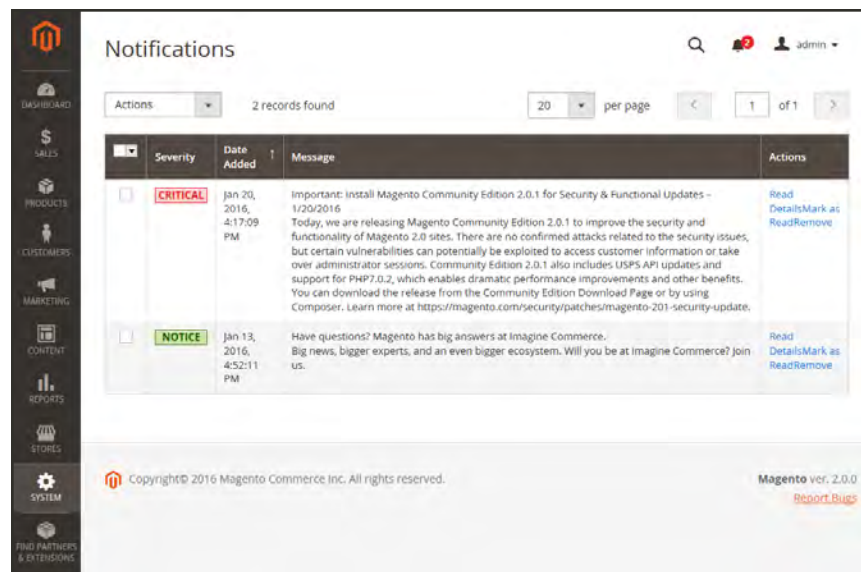
To manage incoming messages:

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

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

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

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

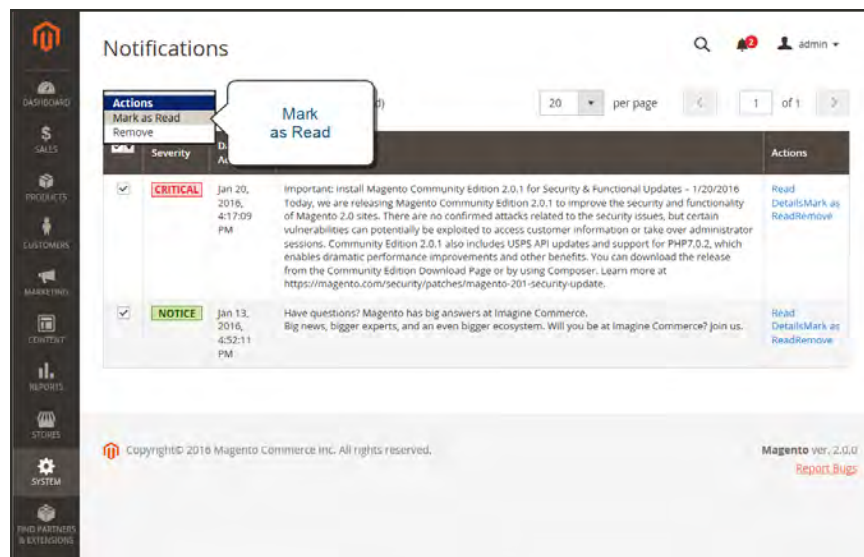


Notifications

3. After reading a message, do any of the following in the Actions column:
 - For more information, tap **Read Details**.
 - To keep the message, tap **Mark As Read**.
 - To delete the message from your inbox, tap **Remove**.

To apply an action to multiple messages:

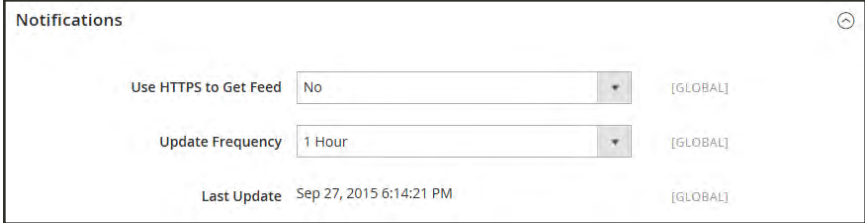
1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Notifications**.
2. In your message inbox, do one of the following:
 - Mark the checkbox at the beginning of each message you want to manage.
 - Choose one of the group selection options above the list to select multiple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



Mark as Read

To configure notifications:

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



The screenshot shows a configuration panel titled "Notifications" with a collapse icon in the top right corner. It contains three settings, each with a dropdown menu and a "[GLOBAL]" label to its right:

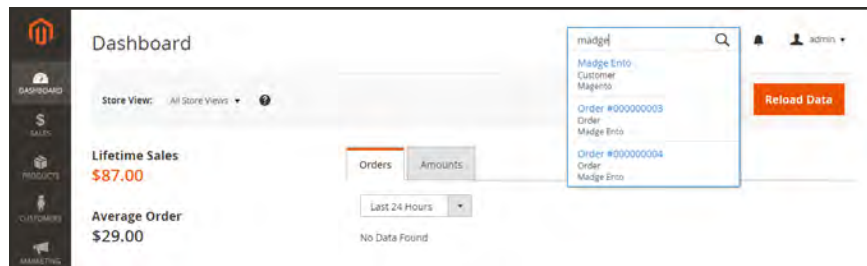
- Use HTTPS to Get Feed**: Set to "No".
- Update Frequency**: Set to "1 Hour".
- Last Update**: Set to "Sep 27, 2015 6:14:21 PM".

Notifications

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

Global Search

The spy glass at the top 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 close match:

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

To find an exact match:

1. In the header, tap the **spy glass** 🔍 to open the search box. Then, enter the full word, such as a customer name, product name or SKU, that you want to find.
2. In the search results, click any item to open the record.

Grid Controls

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

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
00000002	Main Website Main Website Store Default Store View	Nov 12, 2015 5:41:55 PM	Veronica Costello	Veronica Costello	\$61.00	\$61.00	Closed	View
00000001	Main Website Main Website Store Default Store View	Nov 12, 2015 5:41:54 PM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View

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:

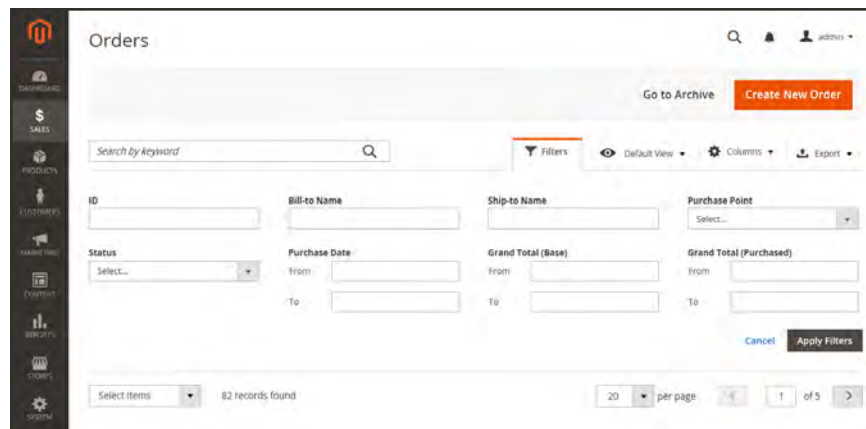
1. Set the **Pagination** control to the number of records that you want to view per page.
2. Tap **Next** and **Previous** to page through the list, or enter a specific **Page Number**.



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**.

The screenshot shows the 'Orders' page in the Magento Admin interface. At the top, there's a search bar with the placeholder 'Search by keyword' and a magnifying glass icon. To the right of the search bar are buttons for 'Go to Archive' and 'Create New Order'. Below the search bar, there's a 'Filters' button with a funnel icon, and other options like 'Default View', 'Columns', and 'Export'. The main filter area contains several input fields: 'ID', 'Bill-to Name', 'Ship-to Name', 'Purchase Point' (a dropdown menu), 'Status' (a dropdown menu), 'Purchase Date' (with 'From' and 'To' fields), 'Grand Total (Base)' (with 'From' and 'To' fields), and 'Grand Total (Purchased)' (with 'From' and 'To' fields). At the bottom of the filter area, there are 'Cancel' and 'Apply Filters' buttons. Below the filter area, there's a 'Select Items' dropdown, a message '82 records found', and a pagination control showing '20 per page' and '1 of 5'.*Filter Controls*

Grid Layout

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

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 move a row:

1. Tap the row and hold.
2. Drag the row to the new position, and release.


To save a grid view:

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

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

To change the view:

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

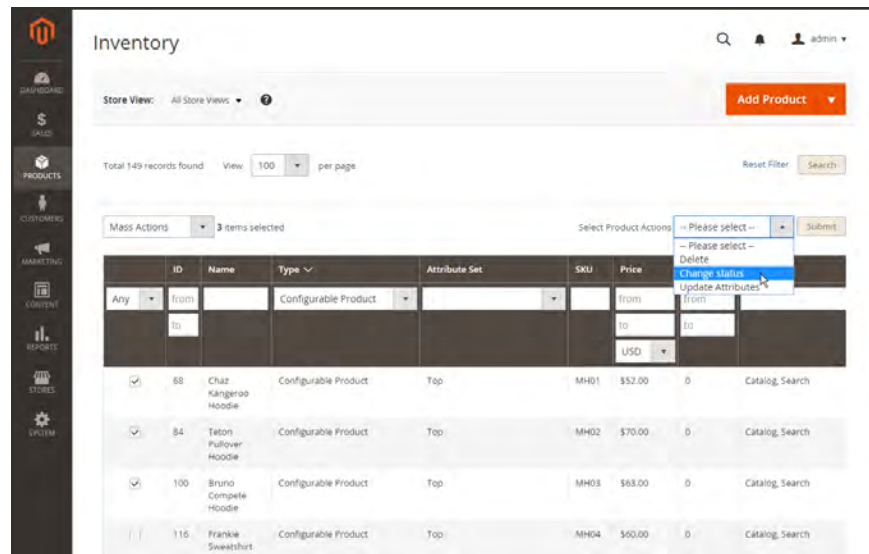
- To use a different view, tap the name of the view.
- To change the name of a view, tap the **Edit**  icon. Then, update the name.

Actions Control

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

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

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



Applying an Action to Selected Records

Step 1: Select Records

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

1. Mark the checkbox of each record that is a target for the action. Or, use one of the following **Mass Actions** to select a group of records:
 - Select All / Unselect All
 - Select Visible / Unselect Visible

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

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

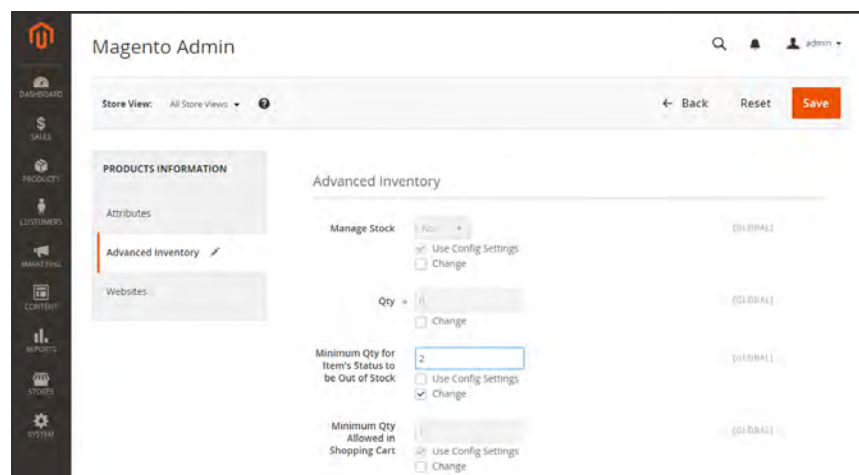
Step 2: Apply an Action to Selected Records

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

Example: Update Attributes

- In the list, mark the checkbox of each record to be updated.
- 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

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

Mass Actions

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

Checkbox States

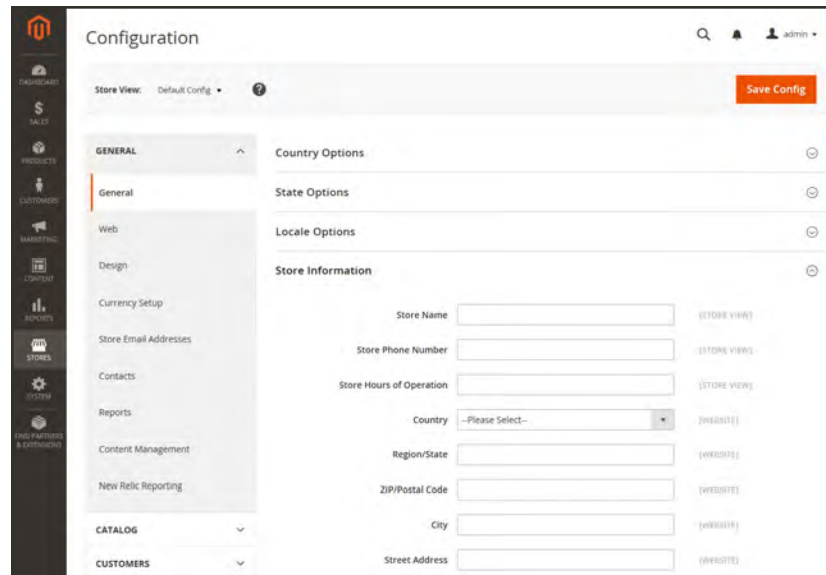
STATE	DESCRIPTION
Any	Lists all records, regardless of checkbox status.
Yes	Lists only records with the checkbox selected.
No	Lists only records without the checkbox selected.



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 ⌵

Store Name	<input type="text"/>	[STORE VIEW]
Store Phone Number	<input type="text"/>	[STORE VIEW]
Store Hours of Operation	<input type="text"/>	[STORE VIEW]
Country	<input type="text" value="--Please Select--"/>	[WEBSITE]
Region/State	<input type="text"/>	[WEBSITE]
ZIP/Postal Code	<input type="text"/>	[WEBSITE]
City	<input type="text"/>	[WEBSITE]
Street Address	<input type="text"/>	[WEBSITE]
Street Address Line 2	<input type="text"/>	[WEBSITE]
VAT Number	<input type="text"/>	[WEBSITE]

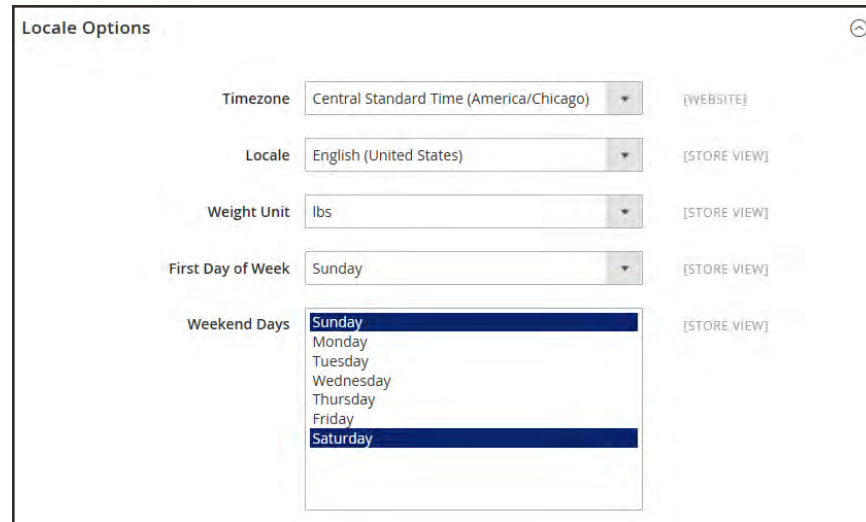
Store Information

To enter your store information:

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

Locale Options

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



The screenshot shows the 'Locale Options' configuration panel. It contains the following settings:

- Timezone:** Central Standard Time (America/Chicago) [WEBSITE]
- Locale:** English (United States) [STORE VIEW]
- Weight Unit:** lbs [STORE VIEW]
- First Day of Week:** Sunday [STORE VIEW]
- Weekend Days:** A list with 'Sunday' and 'Saturday' selected. Other days listed are Monday, Tuesday, Wednesday, Thursday, and Friday.

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

Default Country: United States [STORE VIEW]

Allow Countries: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda [STORE VIEW]

Zip/Postal Code is Optional for: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda [GLOBAL]

European Union Countries: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda [GLOBAL]

Top destinations: Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda [GLOBAL]

Country Options

To set the country options for your store:

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

Merchant Location


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



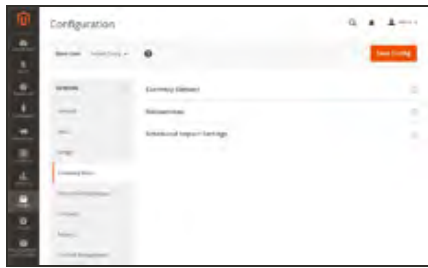
The screenshot shows a configuration panel titled "Merchant Location" with a close button in the top right corner. Inside the panel, there is a "Merchant Country" dropdown menu currently set to "United States". To the right of the dropdown is a text input field containing "[WEBSITE]". Below the dropdown menu, a small note reads: "If not specified, Default Country from General Config will be used".

Merchant Location

To enter the merchant location:

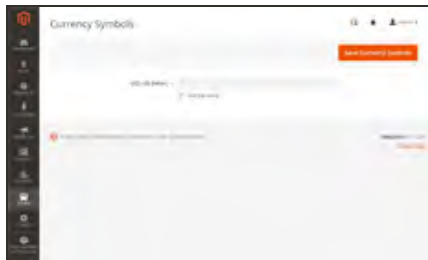
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand  the **Merchant Location** section. Then, choose your **Merchant Country**.
4. When complete, tap **Save Config**.

Currency



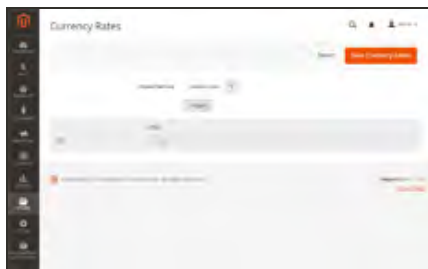
Currency Setup

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



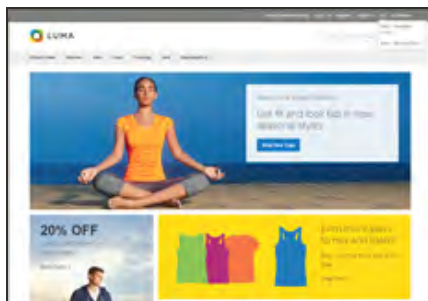
Currency Symbols

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



Updating Currency Rates

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



Currency Chooser

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

Store Email Addresses

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

- General Contact
- Sales Representative
- Customer Support

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

Process Overview:

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


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


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

Step 1: Set Up the Email Addresses for Your Domain

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

Step 2: Configure the Email Addresses for Your Store

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



General Contact

- 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.

- 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.

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

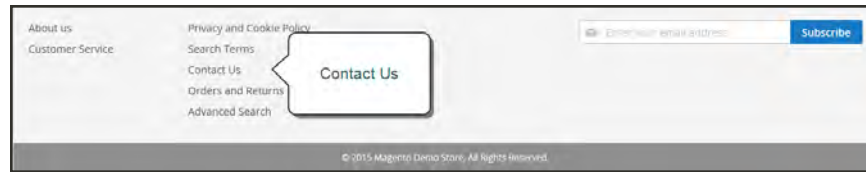
Setting	Value	Action
Enabled	Yes	[STORE VIEW]
New Order Confirmation Email Sender	Sales Representative	[STORE VIEW]
New Order Confirmation Template	New Order (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
New Order Confirmation Template for Guest	New Order for Guest (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
Send Order Email Copy To		[STORE VIEW]
<small>Comma-separated</small>		
Send Order Email Copy Method	Bcc	[STORE VIEW]

Sales Email Order Configuration

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

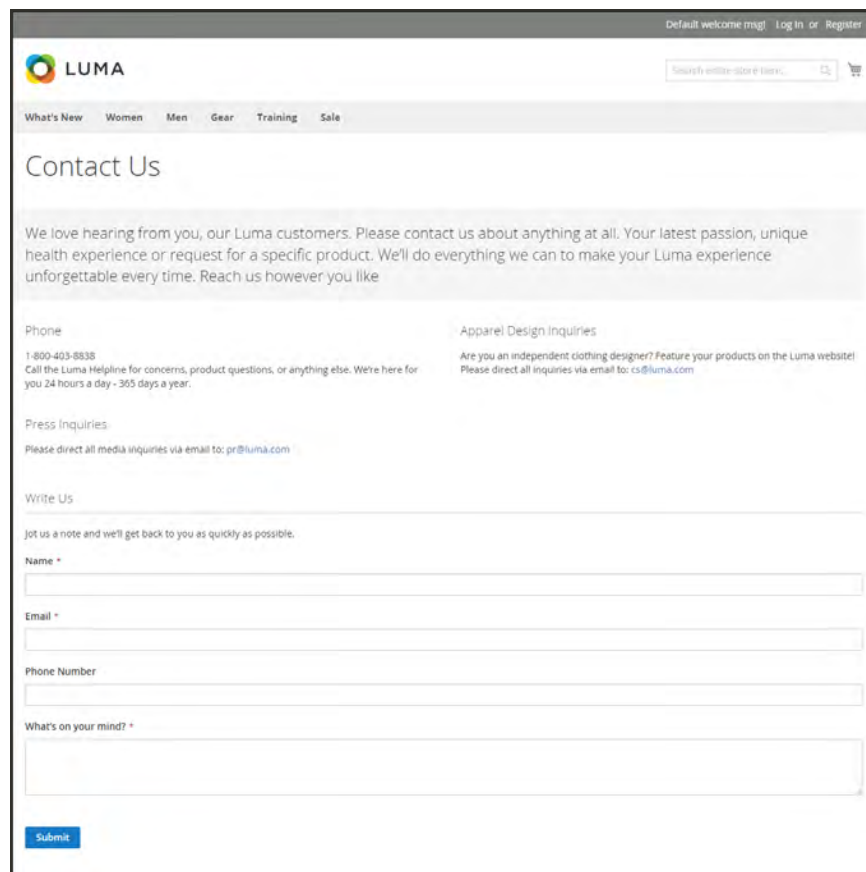
Contact Us

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



Contact Us in Footer

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



Contact Us Form

To configure Contact Us:

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

Contact Us

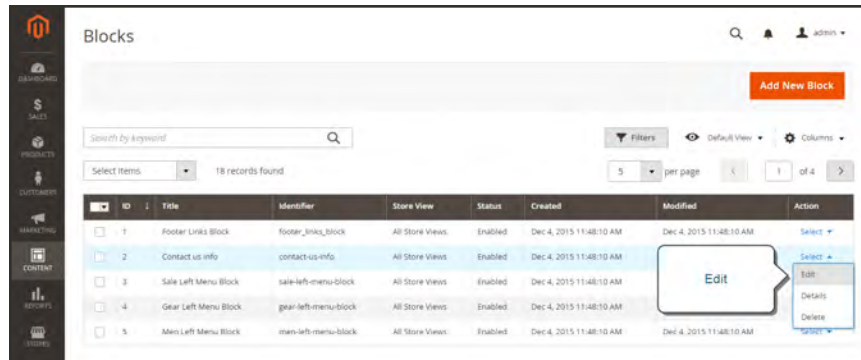
4. Expand ☺ the **Email Options** section. Then, do the following:

Email Options

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

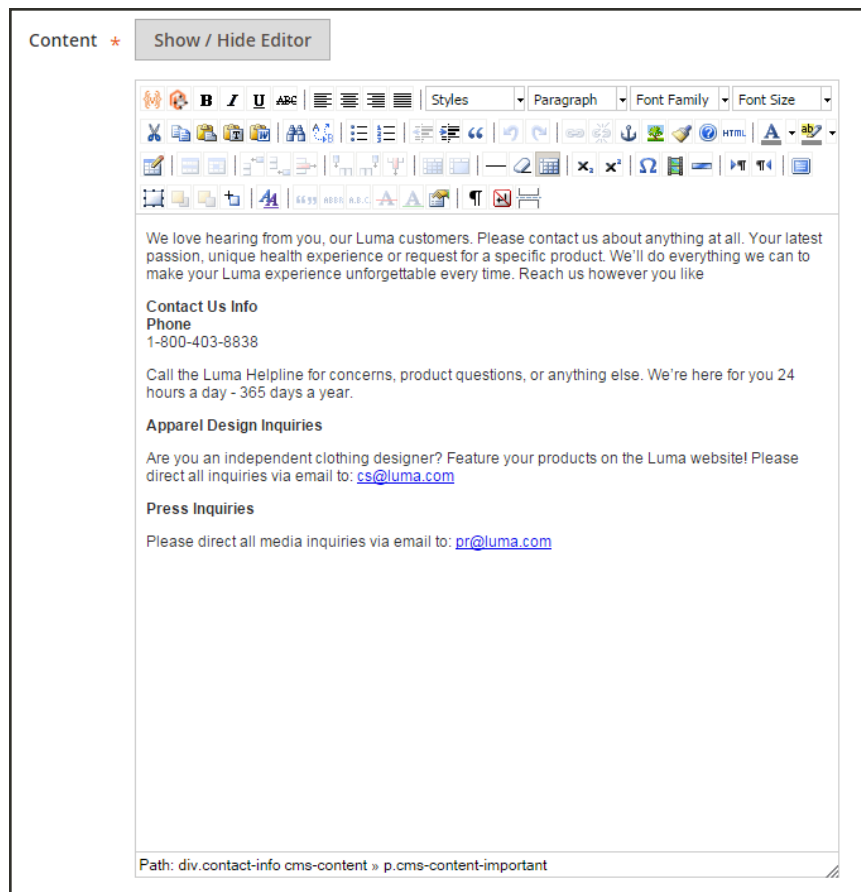
To customize the Contact Us form:

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



Contact Us Info

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



Contact Us Content

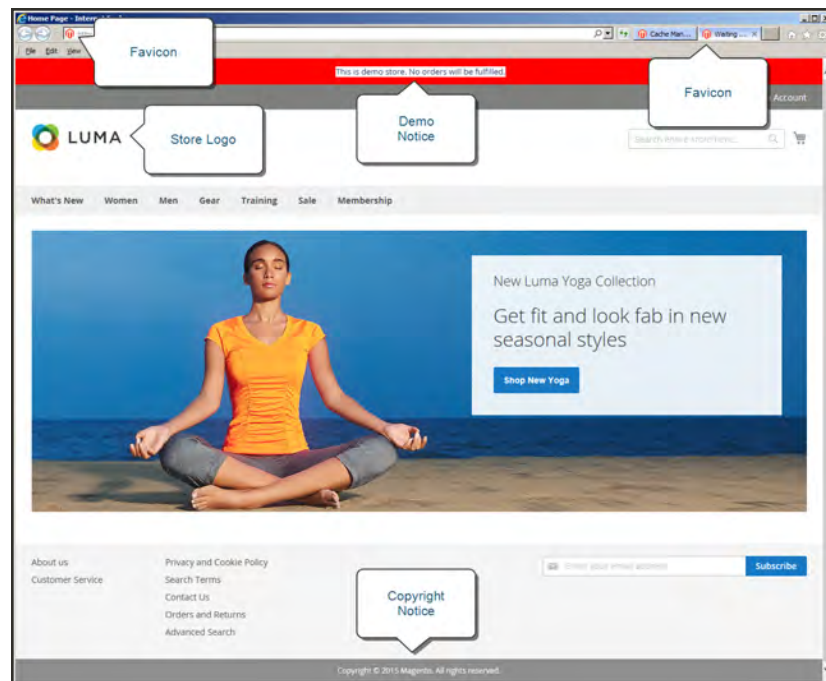
4. When complete, tap **Save Block**.



CHAPTER 7:

Storefront Branding

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



Storefront Branding

Uploading Your Logo

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



Logo in Header

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

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

Relative path: `images/logo.svg`

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

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

To upload your logo:

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

Field	Value	[STORE VIEW]
Logo Image	Choose File No file chosen Allowed file types: PNG, GIF, JPG, JPEG, SVG.	
Logo Image Width		
Logo Image Height		
Logo Image Alt	Magento Commerce	
Welcome Text	Default welcome msg!	

Header

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

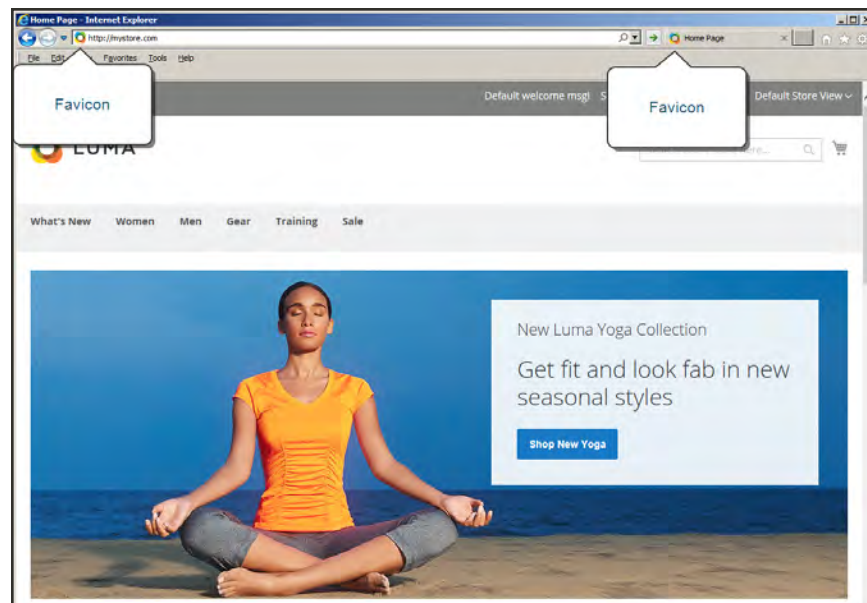
Image File Formats

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

Adding a Favicon

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

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



Favicon in Address Bar


Process Overview:

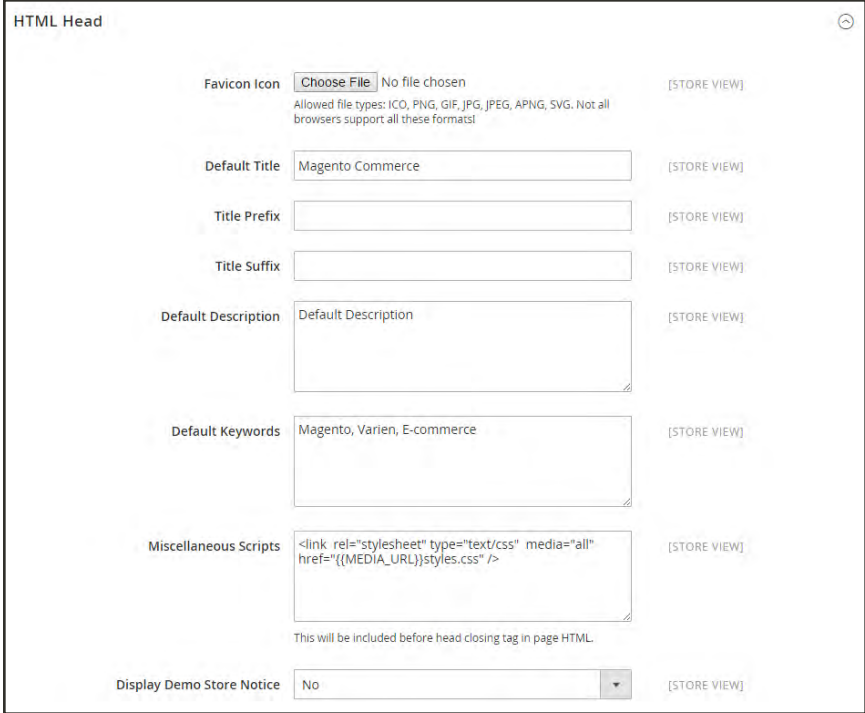
- Step 1: [Create a Favicon](#)
- Step 2: [Upload the Favicon to Your Store](#)
- Step 3: [Refresh the Cache](#)

Step 1: Create a Favicon

1. Create a 16x16 or 32x32 graphic image of your logo, using the image editor of your choice.
2. (Optional) Use one of the available online tools to convert the file to the .ico format. Then, save the file to your computer.

Step 2: Upload the Favicon to Your Store

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



The screenshot shows the 'HTML Head' configuration panel. It includes the following fields and options:

- Favicon Icon:** A 'Choose File' button, 'No file chosen' text, and a list of allowed file types (ICO, PNG, GIF, JPG, JPEG, APNG, SVG). A 'Delete Image' checkbox is present but not checked. A '[STORE VIEW]' link is on the right.
- Default Title:** A text input field containing 'Magento Commerce'. A '[STORE VIEW]' link is on the right.
- Title Prefix:** An empty text input field. A '[STORE VIEW]' link is on the right.
- Title Suffix:** An empty text input field. A '[STORE VIEW]' link is on the right.
- Default Description:** A text area containing 'Default Description'. A '[STORE VIEW]' link is on the right.
- Default Keywords:** A text area containing 'Magento, Varien, E-commerce'. A '[STORE VIEW]' link is on the right.
- Miscellaneous Scripts:** A text area containing the code: `<link rel="stylesheet" type="text/css" media="all" href="{{MEDIA_URL}}styles.css" />`. Below the text area is the note: 'This will be included before head closing tag in page HTML'. A '[STORE VIEW]' link is on the right.
- Display Demo Store Notice:** A dropdown menu set to 'No'. A '[STORE VIEW]' link is on the right.

HTML Head

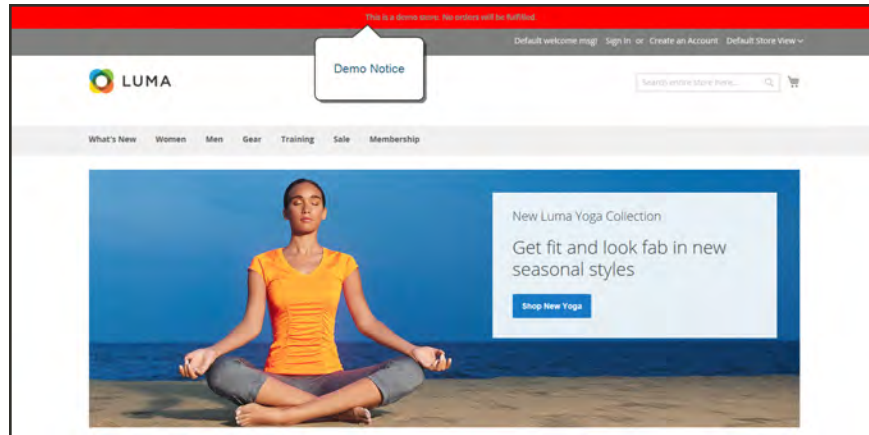
- a. Tap **Choose File**. Then, find the favicon file that you prepared.
 - b. If you want to delete the current favicon, mark the **Delete Image** checkbox.
4. When complete, tap **Save Config**.

Step 3: Refresh the Cache

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

Store Demo Notice

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



Store Demo Notice

To set the store demo notice:

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



HTML Head

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

Changing the Welcome Message

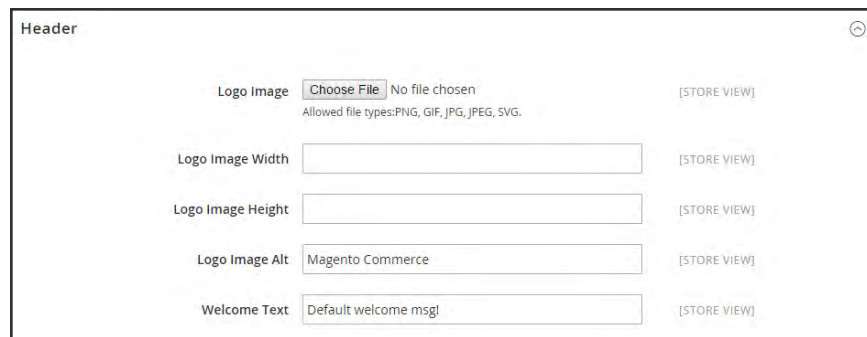
The Welcome message in the header expands to include the name of the customer who is logged in. Before you launch your store, be sure to change the default Welcome text for each store view.



Welcome Message

To change the welcome message:

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



Header

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

Copyright Notice

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



Copyright Notice

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


Long Format Example

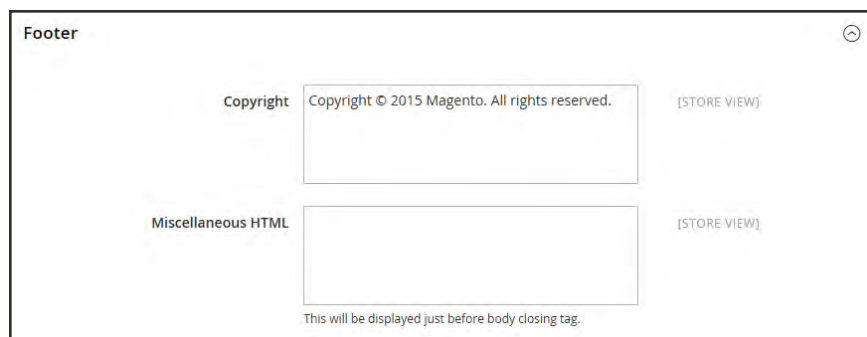
Copyright &Copy; 2016 Magento, Inc. All rights reserved.

Short Format Example

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

To change the copyright notice:

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



Footer

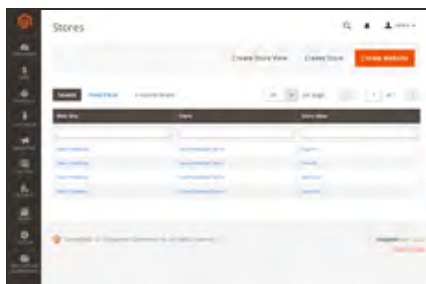
4. In the **Copyright** box, enter the copyright notice that you want to appear in the footer of each page. Use the `&Copy;` character code to insert a copyright symbol.
5. When complete, tap **Save Config**.



CHAPTER 8:

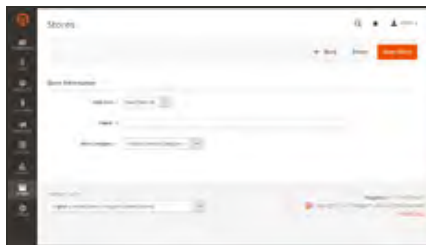
Websites, Stores & Views

A single installation of Magento Community Edition 2.0 can include multiple websites, stores, and views, all managed from the same Admin.



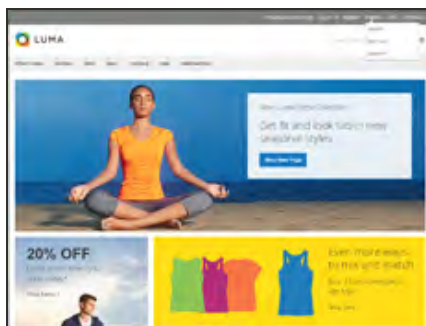
Websites

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



Stores

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



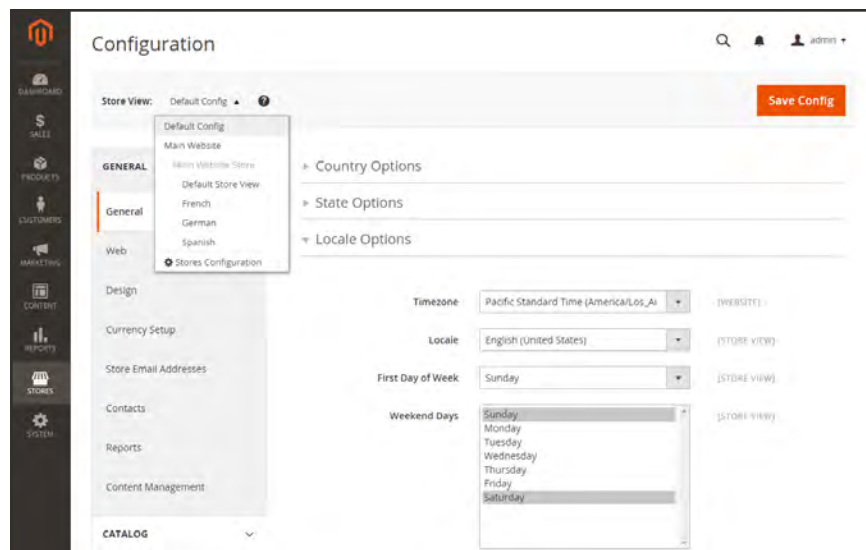
Store Views

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

Configuration Scope

The scope determines which website, store, or view is affected by a configuration setting. If your installation has multiple websites, stores, or views, you can set the scope of a configuration setting to apply to a specific part of the installation. For Admin users with restricted access, the list of available areas includes only those to which the user has access.

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



Store View Control

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

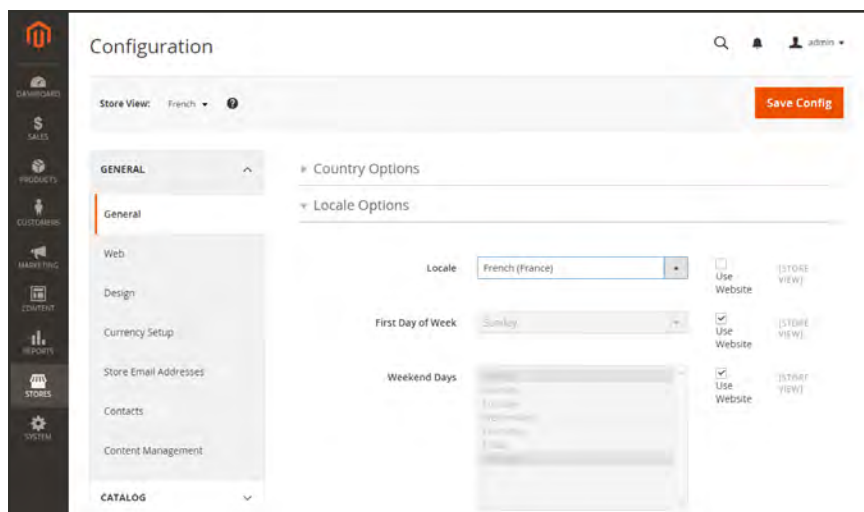
To set the configuration scope:

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

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Navigate to the configuration setting to be changed. Then, do the following:
 - a. In the upper-left corner, set **Store View** to the specific view where the configuration is to apply. When prompted to confirm scope switching, tap **OK**.

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

 - b. Clear the **Use Website** checkbox after any field that you want to edit. Then, update the value for the view.
 - c. Repeat this process for every field that needs to be updated on the page.
3. When complete, tap **Save Config**.



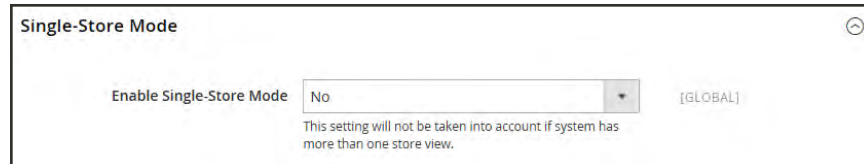
Setting the Locale for a View

Scope Settings

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

Single Store Mode

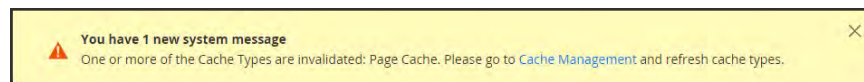
If your Magento Community 2.0 installation has only a single store and view, you can simplify the display by turning off all Store View options and scope indicators. Most of the screenshots in this guide were taken with Single Store Mode disabled, which causes a scope indicator to appear after each configuration setting. Single Store Mode is automatically overridden if you later add a store view.



Single Store Mode Disabled

To set single store mode:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. Scroll down to the bottom of the page, and expand the **Single Store Mode** section.
3. Set **Enable Single Store Mode** to “Yes.”
4. Tap **Save Config**.
5. When prompted to refresh the cache, do the following:
 - a. Tap the **Cache Management** link in the system message at the top of the page.



System Message

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



CHAPTER 9:

Industry Compliance

Magento Community Edition 2.0 offers a range of security and privacy capabilities that meet legal requirements and industry guidelines for online merchants. Some are mandated by the payment card industry, and others are required by law, depending on your location.

- Legal Requirements
- Industry Guidelines
- Best Practices

You will learn about PCI compliance, and the importance of establishing procedures to protect payment information. You will also learn how to bring your store into compliance with the Cookie Law, which is a requirement in some countries, and considered a “best practice” in others. In addition, you will learn how to customize and maintain a privacy policy for your store.

PCI Compliance Guidelines

The Payment Card Industry (PCI) has established a set of requirements for businesses that accept payment by credit card over the Internet. In addition to the need to maintain a secure hosting environment, there are additional requirements that merchants must meet to ensure the privacy of cardholder data. Every merchant who handles customer credit card information is required by the Payment Card Industry to conduct business within the following guidelines:

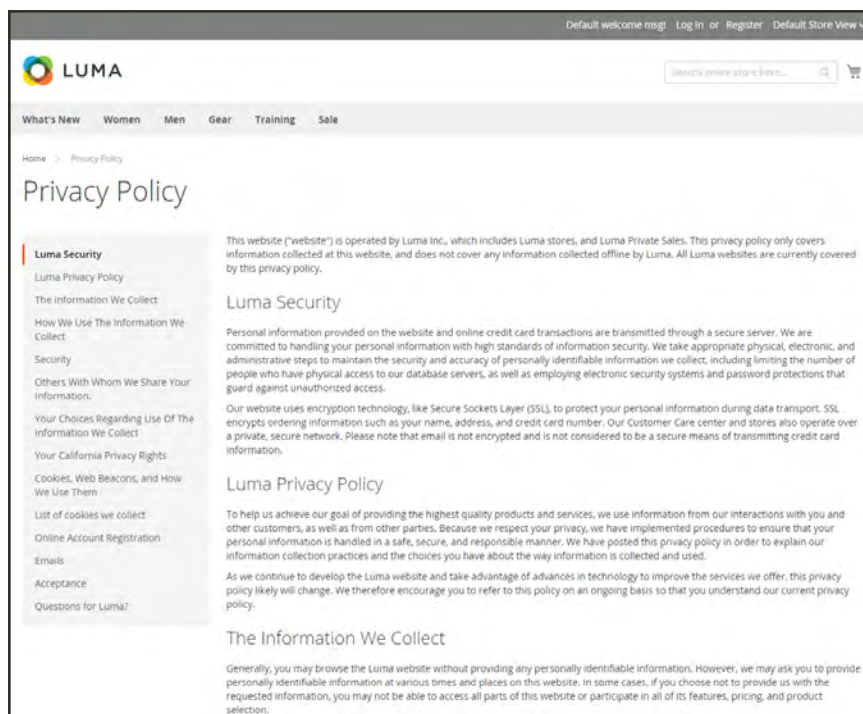
PCI Requirements

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

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

Privacy Policy

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



Privacy Policy

To edit your privacy policy:

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

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

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

Cookie Law Compliance

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

Method 1: Implied Consent

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

Method 2: Expressed Consent

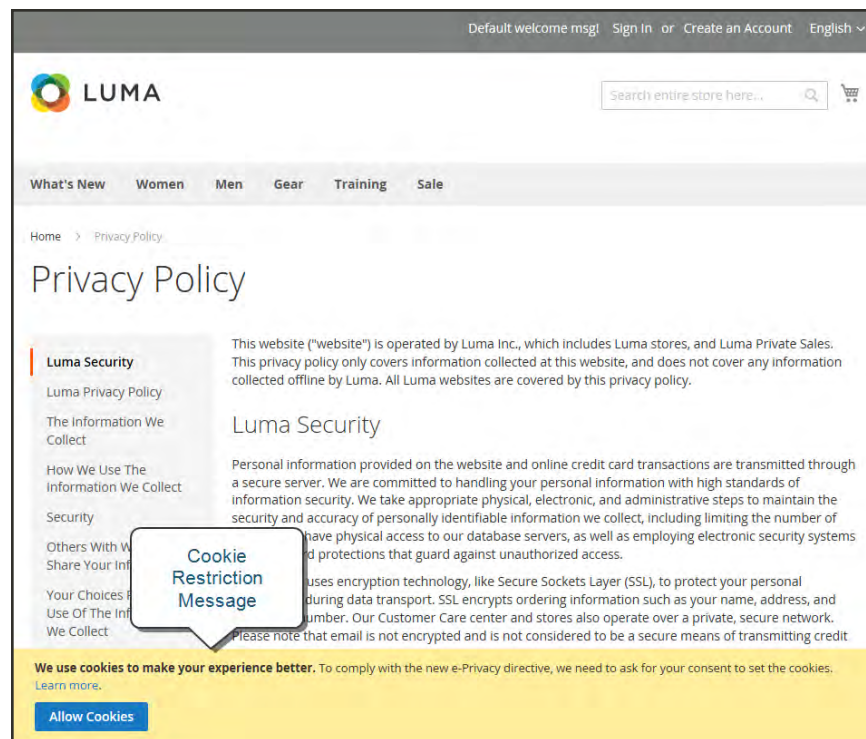
Operating your store in **cookie restriction mode** requires visitors to express their consent before any cookies can be saved to their computers. Unless consent is granted, many features of your store will be unavailable. For example, if Google Analytics is available for your store, it can be invoked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

Cookie Restriction Mode

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

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

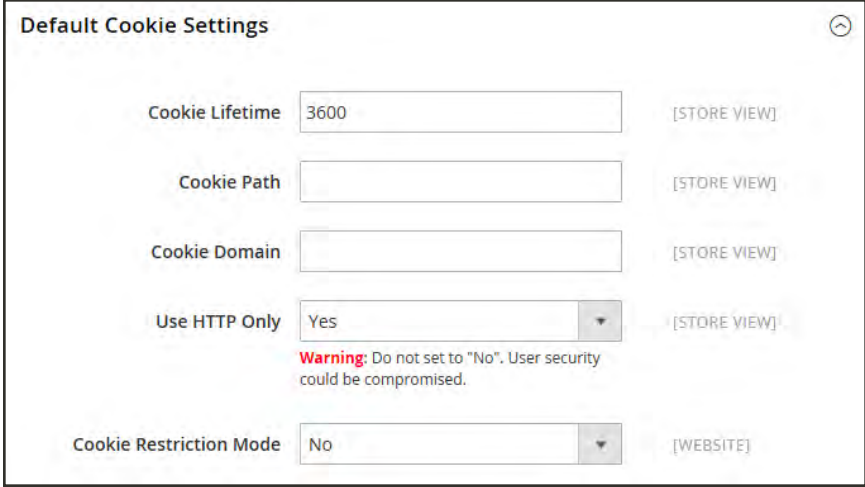
If you change the URL key of the privacy policy, you must also create a custom URL rewrite to redirect traffic to the new URL key. Otherwise, the link in the Cookie Restriction Mode message will return “404 Page Not Found.”



Cookie Restriction Notice In Footer

Step 1: Enable Cookie Restriction Mode

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



Default Cookie Settings

Cookie Lifetime: 3600 [STORE VIEW]

Cookie Path: [STORE VIEW]

Cookie Domain: [STORE VIEW]

Use HTTP Only: Yes [STORE VIEW]

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

Cookie Restriction Mode: No [WEBSITE]

Default Cookie Settings

- a. Enter the **Cookie Lifetime** in seconds.
 - b. If you want to make cookies available to other folders, enter the **Cookie Path**. To make the cookies available anywhere in the site, enter a forward slash.
 - c. To make the cookies available to a subdomain, enter the subdomain name in the **Cookie Domain** field. (subdomain.yourdomain.com) To make cookies available to all subdomains, enter the domain name preceded by a period. (.yourdomain.com)
 - d. To prevent scripting languages such as JavaScript from gaining access to cookies, make sure that **Use HTTP Only** is set to “Yes.”
 - e. Set **Cookie Restriction Mode** to “Yes.”
3. When complete, tap **Save Config**.
 4. When prompted to update the cache, click the **Cache Management** link in the system message. Then, refresh the invalid cache.

Step 2: Update Your Privacy Policy

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

Cookie Reference

Magento Standard Cookies

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

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

Google Analytics Cookies

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

PRODUCTS

Products Menu

Creating Products

Basic Settings

Advanced Settings

Categories

Product Attributes

Contents

Products Menu

- Inventory Workspace
- Product Scope

Creating Products

- Catalog URLs
- Product Workspace
 - Default Field Values

Product Types

- Simple Product
- Configurable Product
 - Adding Configurations
- Grouped Product
- Virtual Product
- Bundle Product
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- Product Details
- Images and Videos
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 - Product Videos
 - Placeholders
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 - Swatches
 - Creating a Swatch
- Search Engine Optimization
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- Pricing
 - Group Price
 - Special Price
 - Tier Price
 - Minimum Advertised Price
 - MAP Logic
 - MAP Configuration

Inventory

- Stock Options
 - Product Stock Options
- Stock Message Scenarios
- Product Alerts
 - Product Alert Run Settings

Custom Options

Related Products

Up-sells

Cross-sells

Design

Autosettings

Product Reviews

- Ratings

Categories

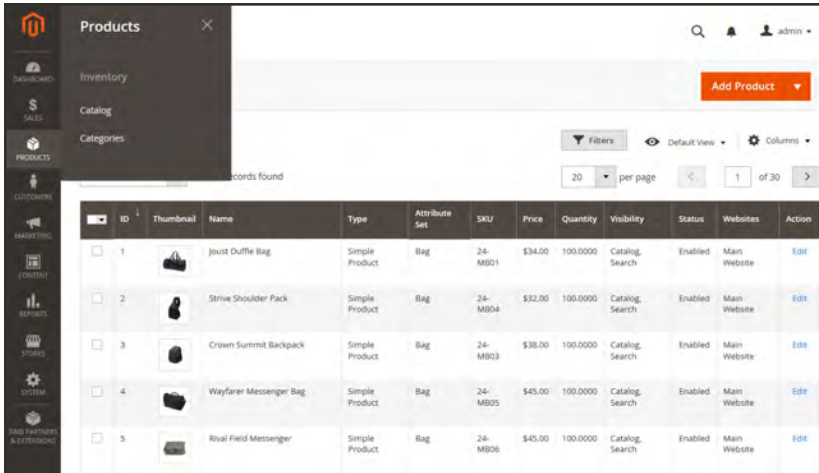
- Creating Categories
 - Modifying Categories
 - Root Categories
 - Hidden Categories
- General Information
- Display Settings
- Custom Design
- Category Products

Product Attributes






- Adding an Attribute
- Attribute Input Types
 - Date & Time Options

CHAPTER 10:**Products Menu**

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

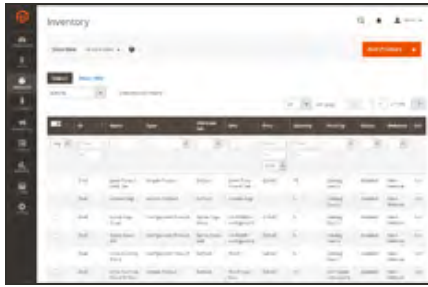


The screenshot shows the Magento Products Menu interface. On the left is a sidebar with navigation options: Dashboard, Inventory, Catalog, Categories, Customers, Reports, Stores, System, and Sales Channels & Extensions. The main area displays a table of products with columns for ID, Thumbnail, Name, Type, Attribute Set, SKU, Price, Quantity, Visibility, Status, Websites, and Action. The table contains five rows of product data.

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
1		Jovst Duffle Bag	Simple Product	Bag	24-MB01	\$34.00	100.0000	Catalog Search	Enabled	Main Website	Edit
2		Strive Shoulder Pack	Simple Product	Bag	24-MB04	\$32.00	100.0000	Catalog Search	Enabled	Main Website	Edit
3		Crown Summit Backpack	Simple Product	Bag	24-MB03	\$38.00	100.0000	Catalog Search	Enabled	Main Website	Edit
4		Wayfarer Messenger Bag	Simple Product	Bag	24-MB05	\$45.00	100.0000	Catalog Search	Enabled	Main Website	Edit
5		Rival Field Messenger	Simple Product	Bag	24-MB06	\$45.00	100.0000	Catalog Search	Enabled	Main Website	Edit

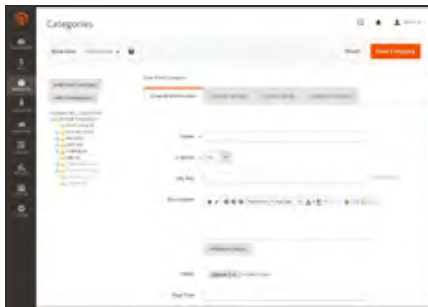
Products Menu

Menu Options



Catalog

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

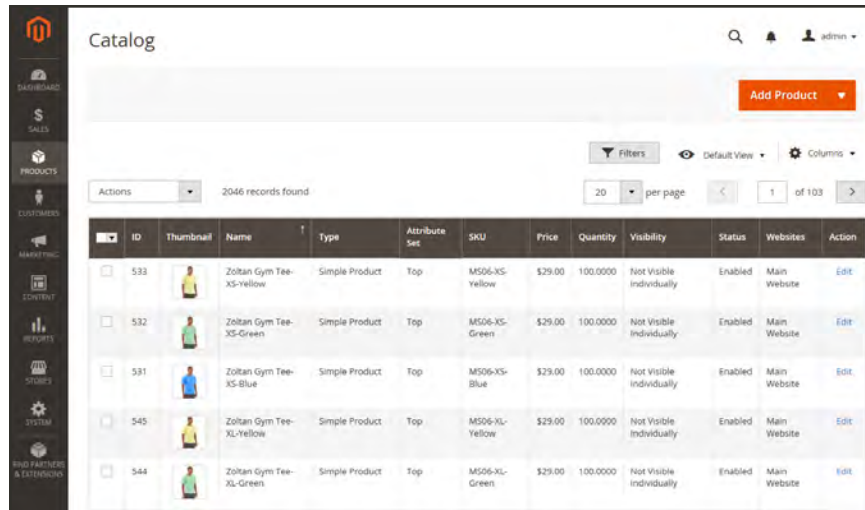


Categories

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

Catalog Workspace

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

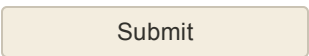


Catalog Grid

Workspace Controls

CONTROL	DESCRIPTION
Store View	Sets the scope of the product to a specific view.
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block; margin-bottom: 10px;">Add Product</div>	Click the Add Product button to create a new simple product. To choose a specific product type, click the down arrow. Options include: Simple Product Configurable Product Grouped Product Virtual Product Bundle Product Downloadable Product
Search	Initiates a catalog search based on the current filters.
Reset Filter	Restores all filters to a blank state.

Workspace Controls (cont.)

CONTROL	DESCRIPTION
Actions	Lists all actions that can be applied to selected 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
Mass Actions	Can be used to select multiple records as the target of action. The checkbox is marked in the first column of each selected record. Options: Select All Unselect All Select Visible Unselect Visible
	Applies the current action to selected product records.
Edit	Opens the product in edit mode. You can accomplish the same thing by clicking anywhere on the row.

Columns

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

Columns (cont.)

COLUMN	DESCRIPTION
	<ul style="list-style-type: none"> Simple Product Virtual Product Bundle Product Downloadable Product Grouped Product Configurable Product
Attribute Set	The product template upon which the product is based.
SKU	A unique Stock Keeping Unit that is assigned to the product.
Price	The unit price of the product.
Quantity	The quantity currently in stock.
Visibility	<p>Indicates where in the catalog the product is visible. Options:</p> <ul style="list-style-type: none"> Not Visible Individually Catalog Search Catalog, Search
Status	<p>Indicates the current status of the product. Options:</p> <ul style="list-style-type: none"> Enabled Disabled
Websites	Indicates the website(s) where the product is available.

Product Scope

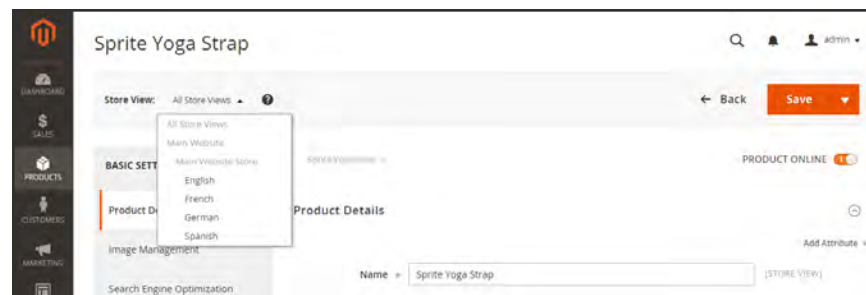
For installations with multiple websites, stores, and views, the scope determines where products are available for sale, and manages the product information for each store view. Initially, all products that you create are published to the default website, store, and view.

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

To edit the product information for a specific view, use the Store View control in the upper-left corner to select the view. After the view is selected, additional controls become available for any field that can be edited at the store view level. In the following example, although the Spanish store view is selected, the product information is still in the language of the default store view. The process of editing a product for a store view can be likened to adding a layer of product information that is specific to the view. For example, you can switch to the Spanish view, and translate the text fields, such as product title, description, and the meta data. To learn more, see: [Translating Products](#).

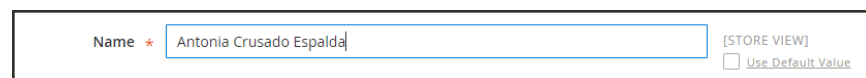
To edit product information for a different view:

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



Store View

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



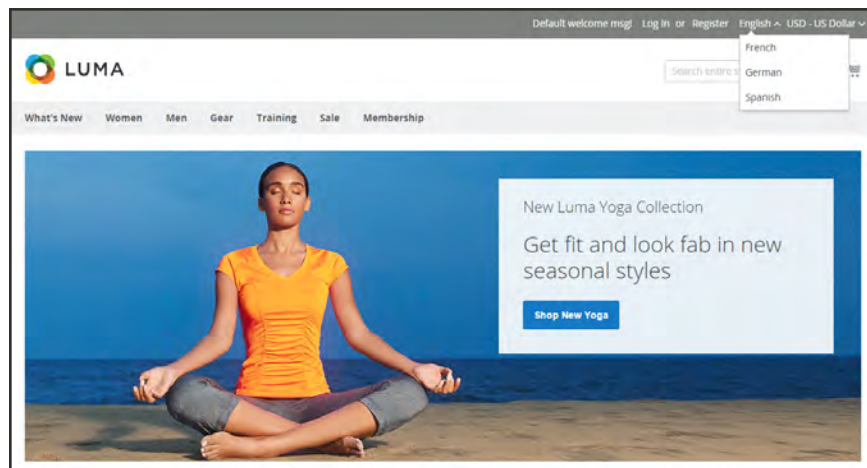
Editing a Field for a View

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



Customer View

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



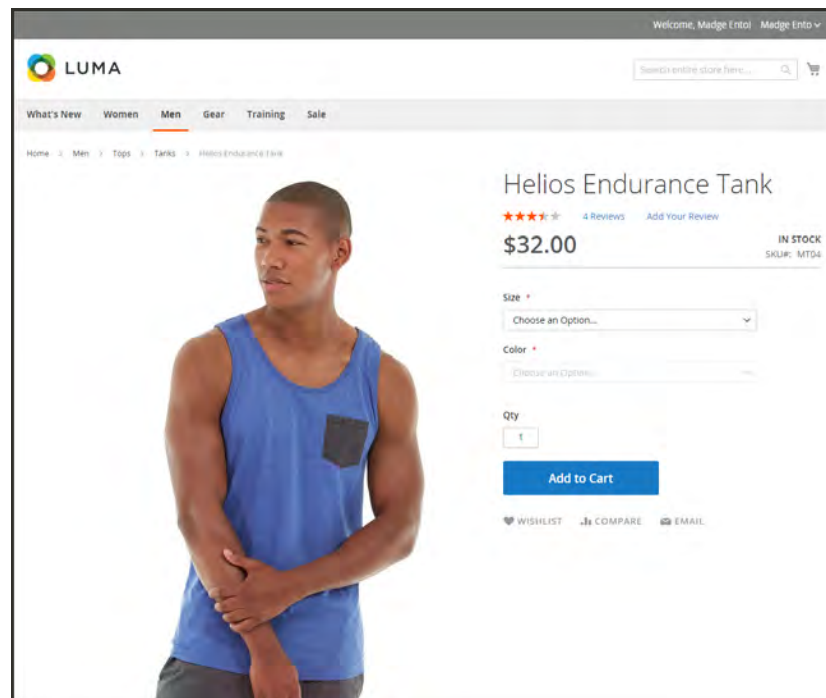
Language Chooser

CHAPTER 11:

Creating Products

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

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



Product Catalog

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

Catalog URLs

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

Dynamic URL

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

```
http://mystore.com/catalogsearch/result/?q=tee+shirt
```

Static URL

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

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

URL Key

The URL key is the part of a static URL that describes the product or category. When you create a product or category, an initial URL key is automatically generated, based on the name. The URL key should consist of lowercase characters with hyphens to separate words. A well-designed, “search engine friendly” URL key might include the product name and key words to improve the way it is indexed by search engines. The URL key can be configured to create an automatic redirect if the URL key is changed.

HTML Suffix

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

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

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


Category Path

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

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

To prevent search engines from indexing multiple URLs that lead to the same content, you can exclude the category path from the URL. Another method is to use a canonical meta tag to let search engines know which URLs to index and which to ignore.

To configure catalog URLs:

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

- c. Set **Use Categories Path for Product URLs** to your preference.

URL with Category Path

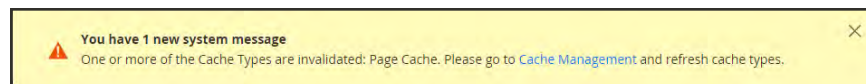
`http://mystore.com/furniture/living-room/microfiber-sofa-sleeper`

URL without Category Path

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

Search Engine Optimization

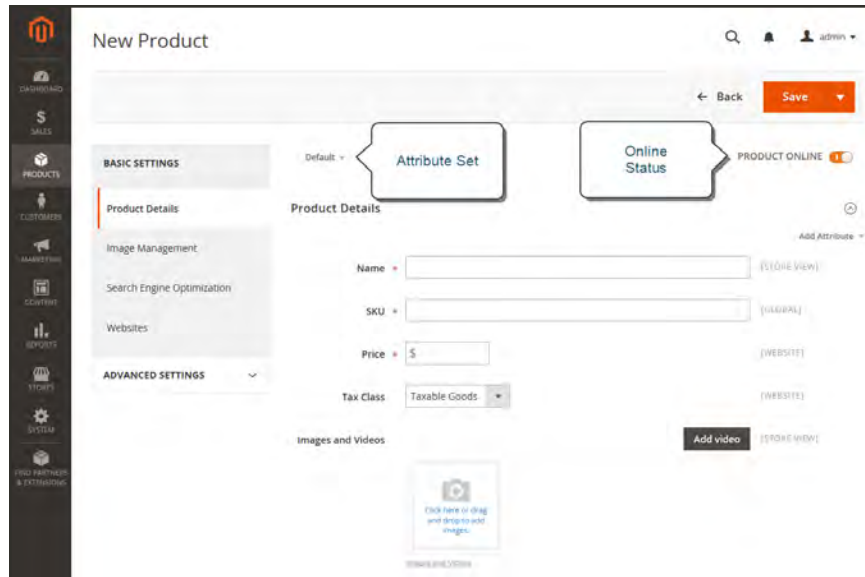
4. When complete, tap **Save Config**.
5. When prompted, click the **Cache Management** link in the system message, and refresh the invalid cache.



Refresh Cache

Product Workspace

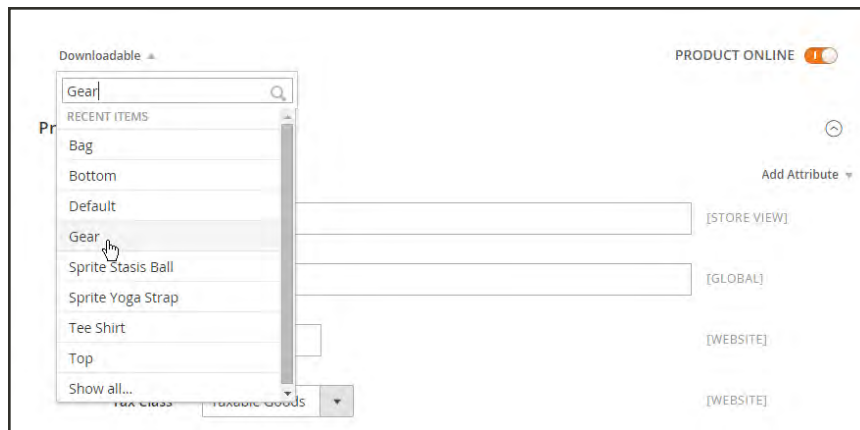
The panel on the left of the product workspace lists the selection of Basic and Advanced Settings, with the current selection on the right. The workspace includes multiple Save options and gives you control over the online status of the product.



Product Workspace

Attribute Set



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



Attribute Sets

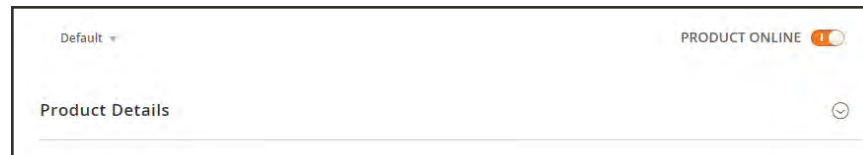
Online Status

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

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

Expand/Collapse

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



Product Details

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

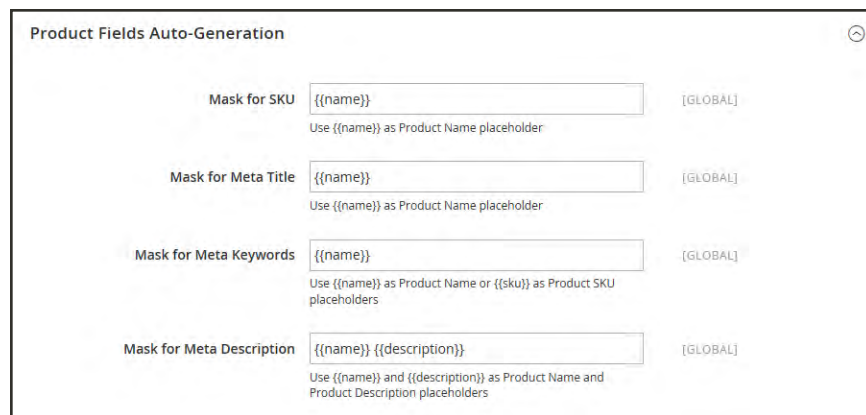
COMMAND	DESCRIPTION
Save	Save the current product, and continue working.
Save & New	Save and close the current product, and begin a new product, based on the same product type and template.
Save & Duplicate	Save and close the current product, and open a new duplicate copy.
Save & Close	Save the current 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-curlly 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}}

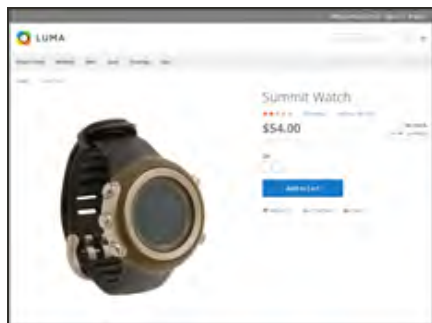
{{name}}

{{short_description}}

{{size}}

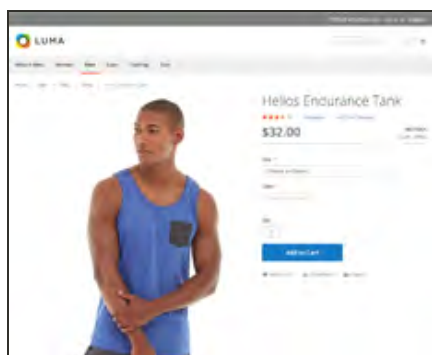
{{sku}}

Product Types



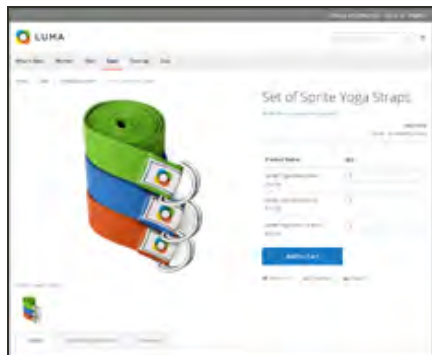
Simple Product

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.



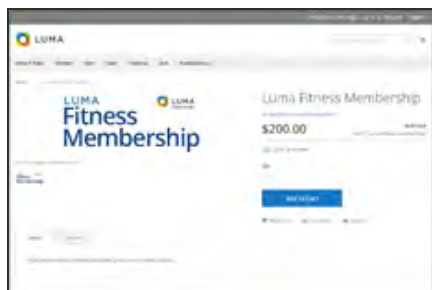
Configurable Product

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.



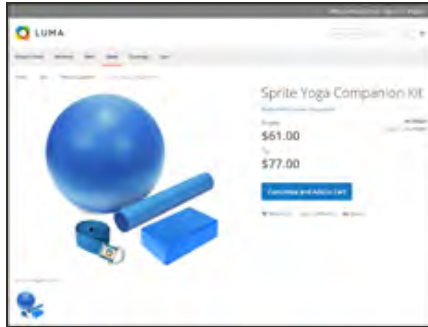
Grouped Product

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.



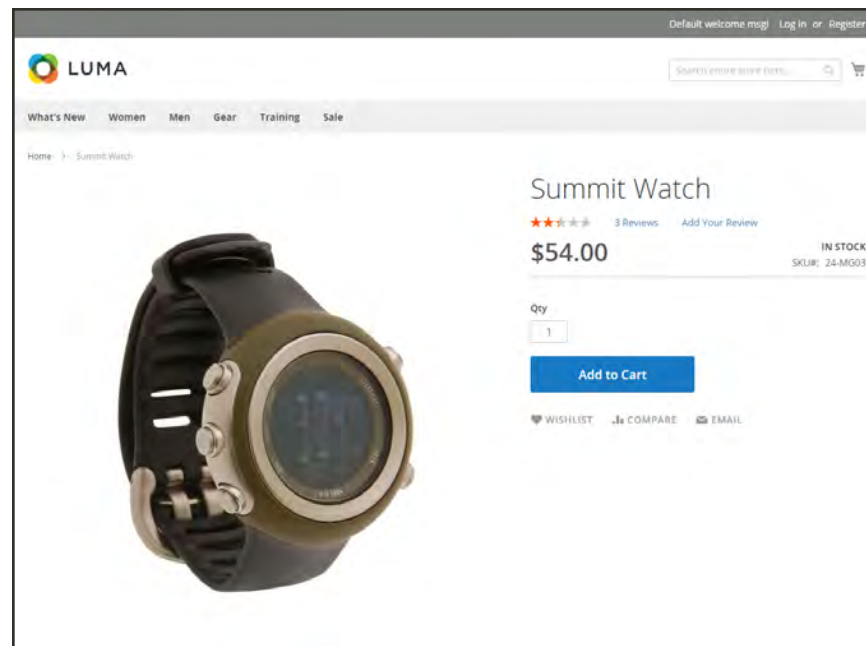
Downloadable Product

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.

Simple Product

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

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



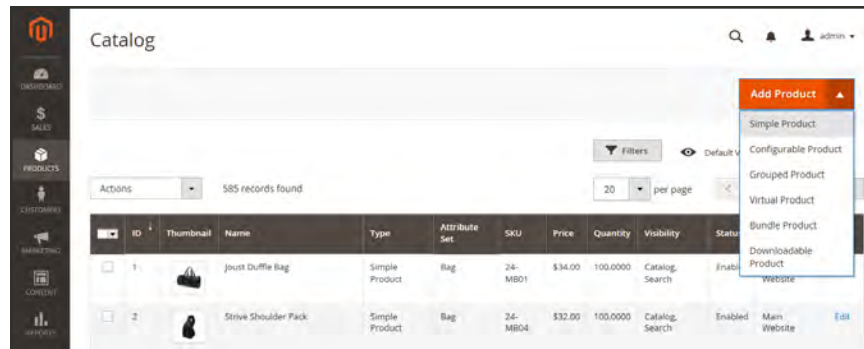
Simple Product

Process Overview:

- Step 1: [Choose the Product Type](#)
- Step 2: [Choose the Product Template](#) (Optional)
- Step 3: [Complete the Required Fields](#)
- Step 4: [Complete the Remaining Product Details](#)
- Step 5: [Publish the Product](#)
- Step 6: [View the Product in Your Store](#)

Step 1: Choose the Product Type

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



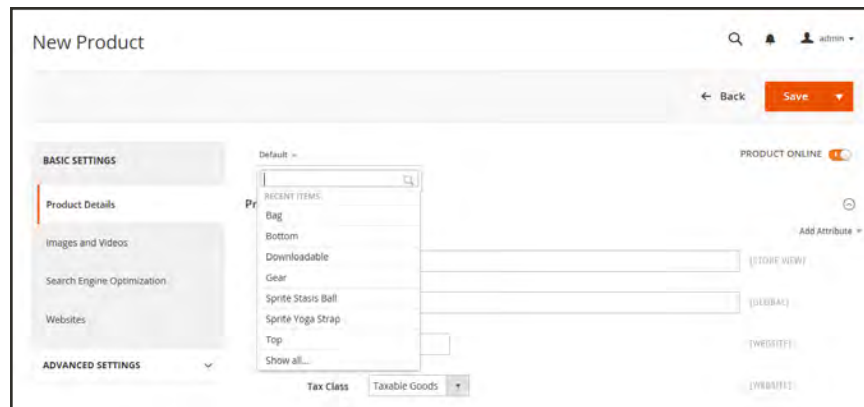
Add Simple Product

Step 2: Choose the Product Template (Optional)

To choose the product template, do one of the following:


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

The form is updated to reflect the template.





Choose Template

Step 3: Complete the Required Fields


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

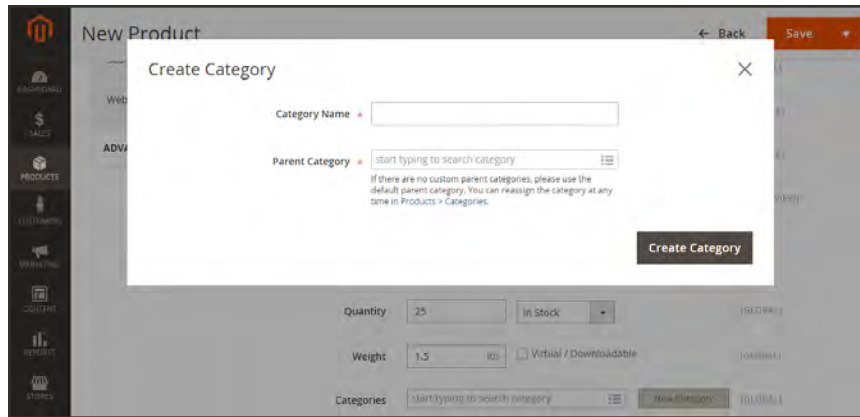
With the required fields complete, the product can be saved as needed.

Step 4: Complete the Remaining Product Details

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

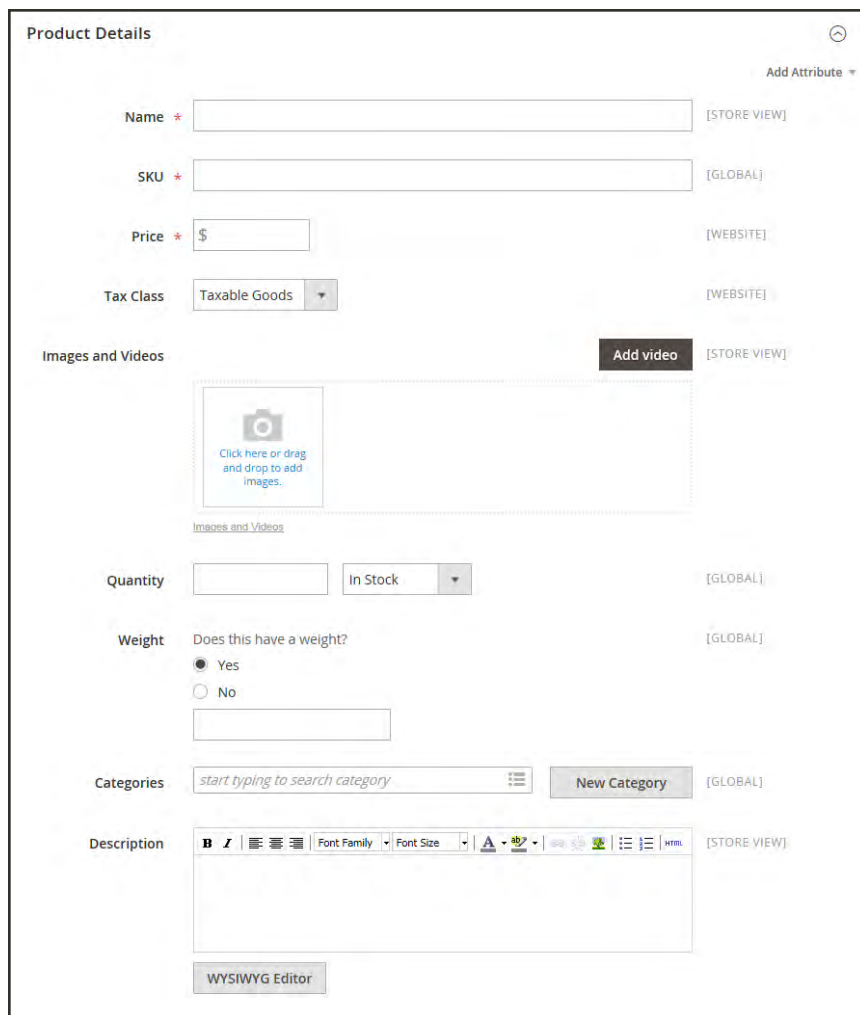
A **placeholder** appears until a product image is uploaded.

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





Create Category

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



Product Details

Step 5: Publish the Product

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



Save & Close



Step 6: View the Product in Your Store

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



Customer View

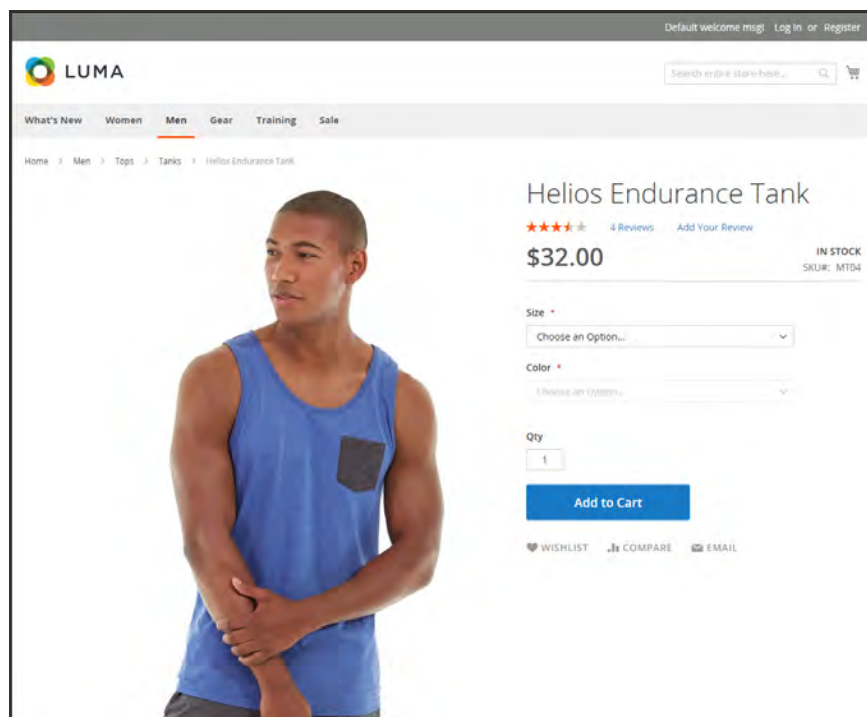
THINGS TO REMEMBER

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

Configurable Product

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

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



Configurable Product

Process Overview:**Part I: Create the Configurable Product**


Step 1: Choose the Product Type

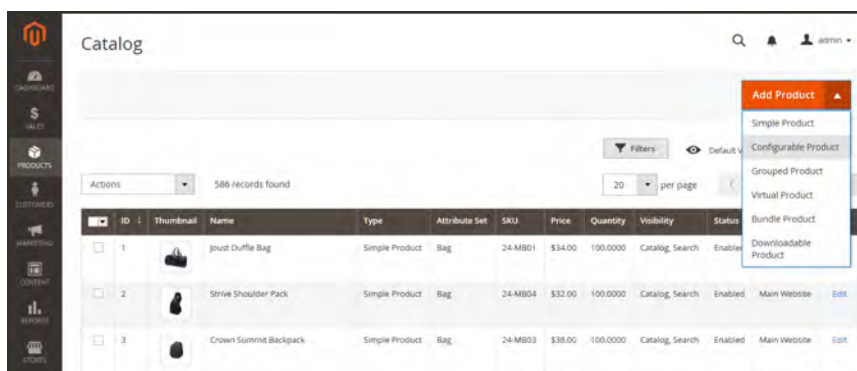
Step 3: Complete the Required Fields

Step 4: Complete the Remaining Product Details

Step 5: Save and Continue

Step 1: Choose the Product Type

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

*Add Configurable Product*

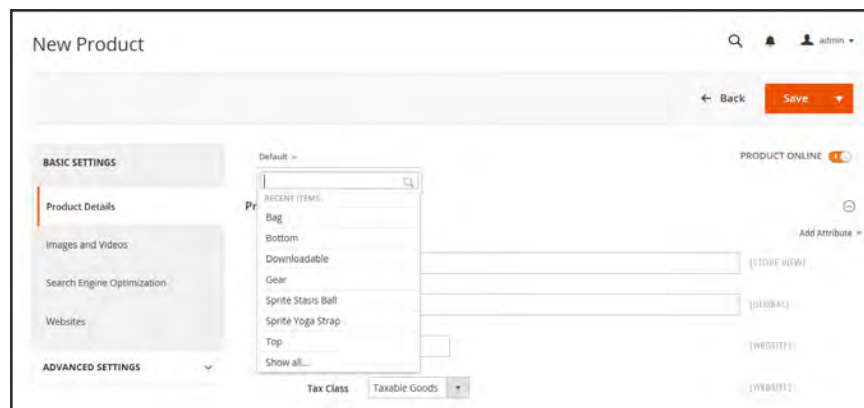
Step 2: Choose the Product Template

The product template that is used to create a configurable product determines the selection of fields that are available, and must include at least one **drop-down attribute**. The drop-down attributes are included in an attribute set, which is then used as a template for the configurable product.

The template used in this example has drop-down attributes for color and size. To choose the product template, click the template field and do one of the following:

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

The form is updated to reflect the template.





Choose Template


Step 3: Complete the Required Fields

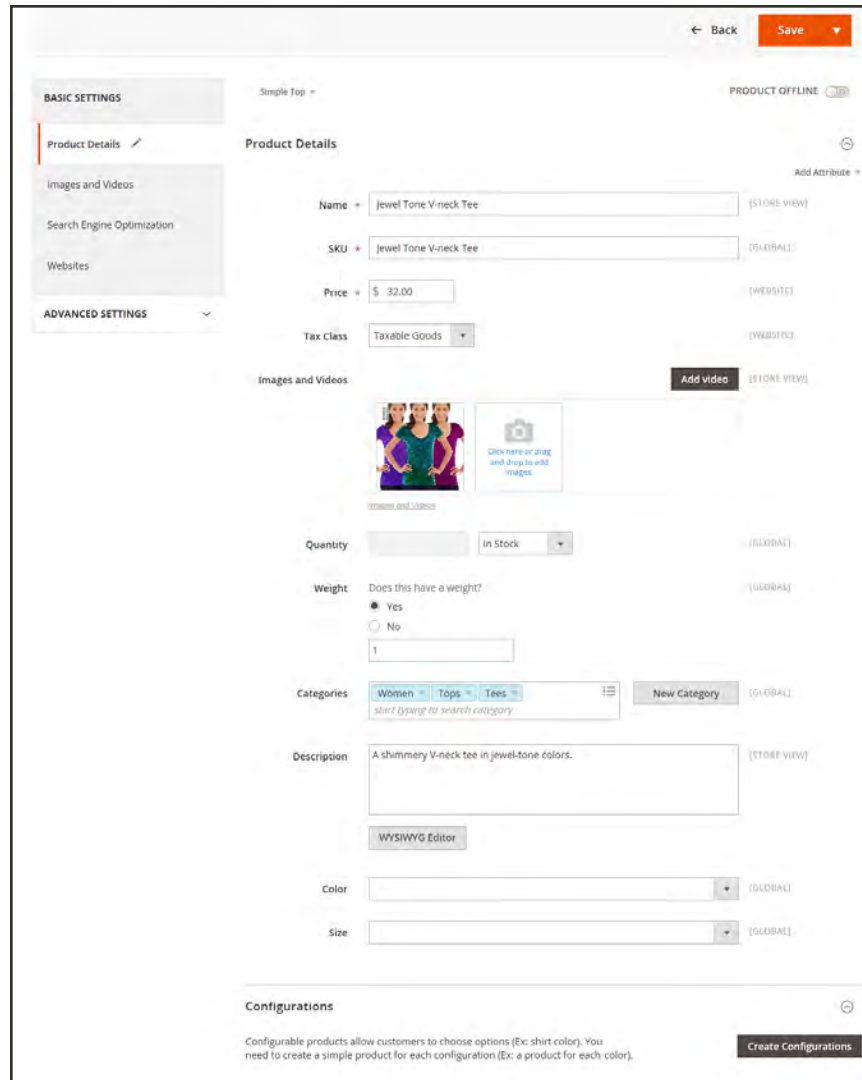
1. In the **Product Details** section, enter the product **Name**.
2. Either accept the default **SKU** that is based on the product name, or enter another value.
3. Enter the product **Price**.
4. If necessary, change the **Tax Class**. The default setting is “Taxable Goods.”
5. Because the product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

Step 4: Complete the Remaining Product Details

1. (Optional) You can add an image that represents the configurable product as a whole, or wait until later when you set up the configurations. In this example, we use an image that shows the top in all three colors. An image uploaded here becomes the image of the “parent product.”
 - Drag an image from your desktop, and drop it on the **camera**  tile in the Images and Videos box.
 - In the box, tap the **camera**  tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

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

2. The **Quantity** field is not available because it’s determined by each product variation.
3. To assign the product to a **Category**, do one of the following:
 - Start typing to find a match. Then, choose the **Category**.
 - Tap the **Show List**  icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
 - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.
4. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor** for additional control.



Product Details

Step 5: Save and Continue

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

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

Adding Configurations

The following example shows how to add configurations for three colors and three sizes. In all, nine simple products will be created with unique SKUs to cover every possible combination of variations. The progress bar at the top of the page shows where you are in the process, and guides you through each step.



Progress Bar

Process Overview:

Part II: Add Configurations

Step 1: **Choose the Attributes**

Step 2: **Enter the Attribute Values**

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

Step 4: **Generate the Product Configurations**

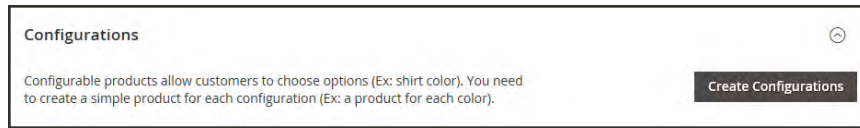
Step 5: **Publish the Products**

Step 6: **Configure the Shopping Cart Thumbnails (Optional)**

Step 7: **View the Products in Your Store**

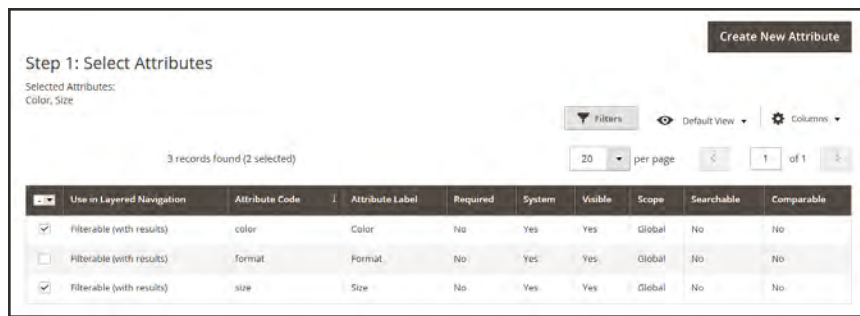
Step 1: Select Attributes

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




Configurations

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



Select Attributes

Step 2: Enter Attribute Values

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

You can rearrange the list of attributes by dragging the box  in the upper-left corner to a new position.

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



Step 3: Configure the Images, Price, and Quantity

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

1. Choose the configuration options that apply.

Configure the Images

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

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



Use Same Images for All SKUs

Method 2: Apply Unique Images for Each SKU

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

1. Select **Apply unique images by attribute to each SKU**.

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

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

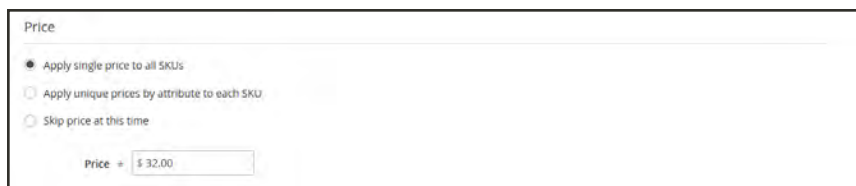


Unique Images per SKU

Configure the Prices

Method 1: Apply the Same Price to All SKUs

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



Same Price per SKU

Method 2: Apply a Different Price for Each SKU

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



Price

Apply single price to all SKUs

Apply unique prices by attribute to each SKU

Skip price at this time

Select attribute = Size

S * \$ 32

M * \$ 32

L * \$ 32

XL * \$ 34

Unique Price per SKU

Configure the Quantity

Method 1: Apply the Same Quantity to All SKUs

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



Quantity

Apply single quantity to each SKUs

Apply unique quantity by attribute to each SKU

Skip quantity at this time

Quantity = 100

Same Quantity for All SKUs

Method 2: Apply Different Quantity by Attribute

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

Different Quantities per Attribute

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

Step 4: Generate the Product Configurations

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



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

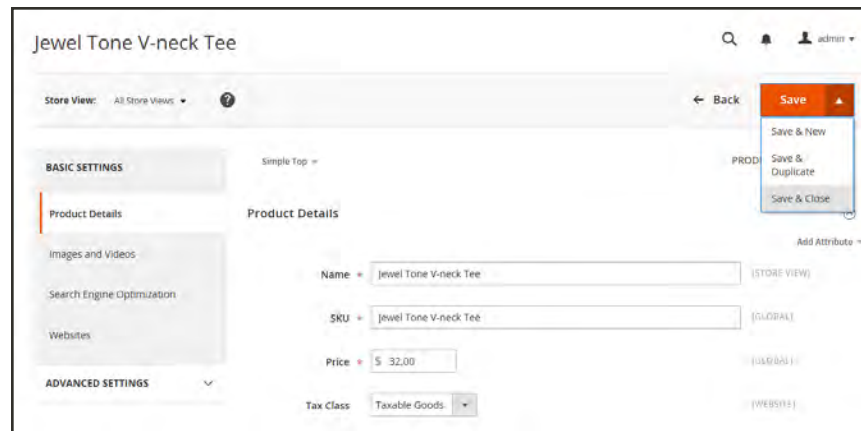
2. If you want to edit any of the settings, tap **Edit Configurations**.

Images	SKU	Quantity	Color	Size	Price
	Jewel Tone V-neck Tee-Amethyst-S	150	Amethyst	S	\$ 32.00
	Jewel Tone V-neck Tee-Amethyst-M	150	Amethyst	M	\$ 32.00
	Jewel Tone V-neck Tee-Amethyst-L	200	Amethyst	L	\$ 32.00
	Jewel Tone V-neck Tee-Amethyst-XL	100	Amethyst	XL	\$ 34.00
	Jewel Tone V-neck Tee-Beryl-S	150	Beryl	S	\$ 32.00

Generate Products

Step 5: Publish the Products

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




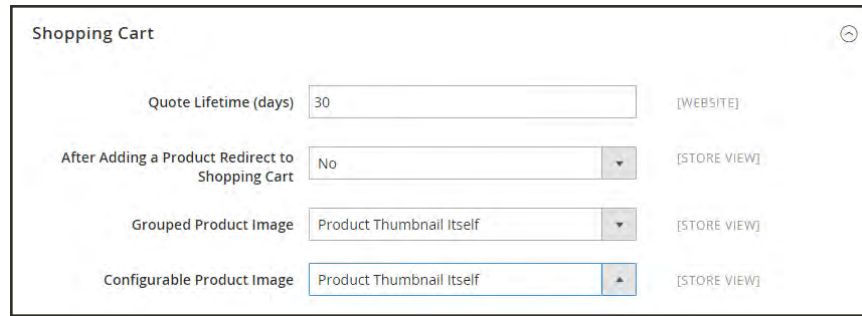
Save & Close

3. When prompted to refresh the cache, tap the **Cache Management** link in the system message, and refresh the invalid cache.
4. On the Admin sidebar, tap **Products**. Your new configurable product and its variations appears in the grid at the top of the list.

Step 6: Configure the Shopping Cart Thumbnails (Optional)

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

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



Shopping Cart - Configurable Product Image


Step 7: View the Product in Your Store


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




Customer View

THINGS TO REMEMBER

- 

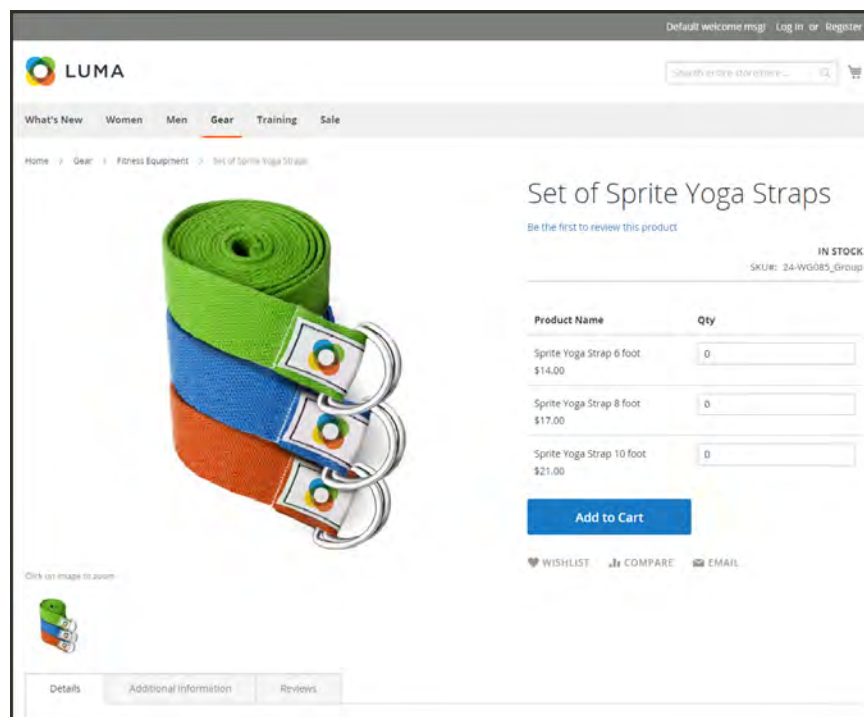
A configurable product allows the shopper to choose options from drop-down lists. Each option is actually a separate, simple product.
- 

Each drop-down list values is based on an attribute of the “Dropdown” input type. The drop-down attributes must be included in the attribute set, which is then used as a template for the configurable product.
- 

The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the product variation.

Grouped Product

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



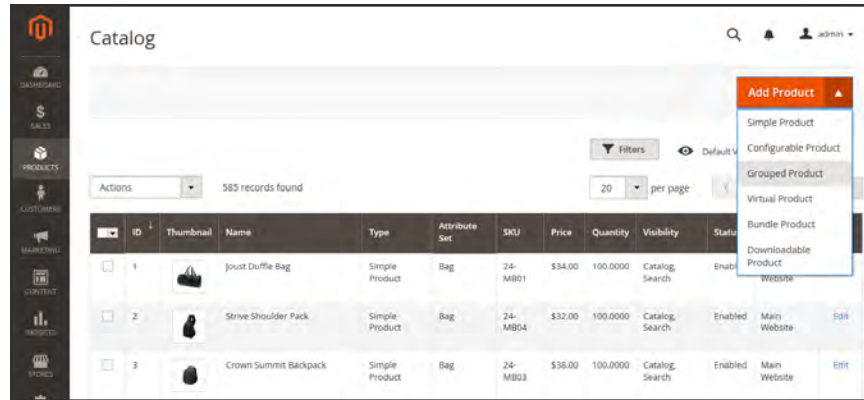
Grouped Product

Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Product Template (Optional)**
- Step 3: **Complete the Required Fields**
- Step 4: **Complete the Remaining Product Details**
- Step 5: **Add the Grouped Products**
- Step 6: **Publish the Product**
- Step 7: **Configure the Shopping Cart Thumbnails (Optional)**
- Step 8: **View the Product in Your Store**

Step 1: Choose the Product Type

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



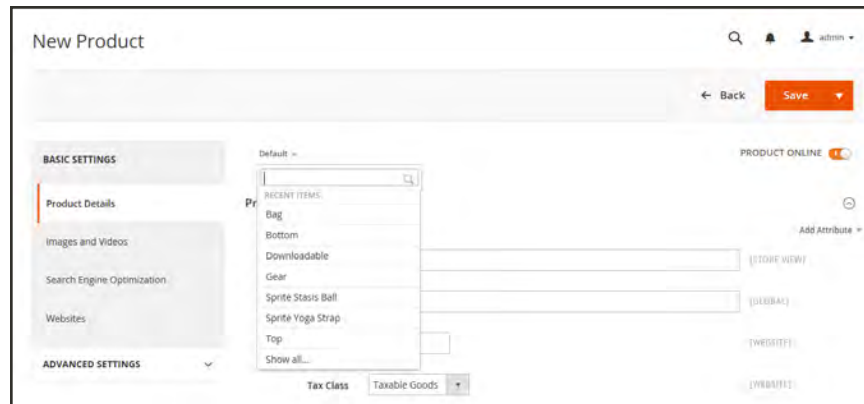
Add Grouped Product

Step 2: Choose the Product Template (Optional)

To choose the product template, do one of the following:


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

The form is updated to reflect the template.






Choose Template

Step 3: Complete the Required Fields

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

Step 4: Complete the Remaining Product Details

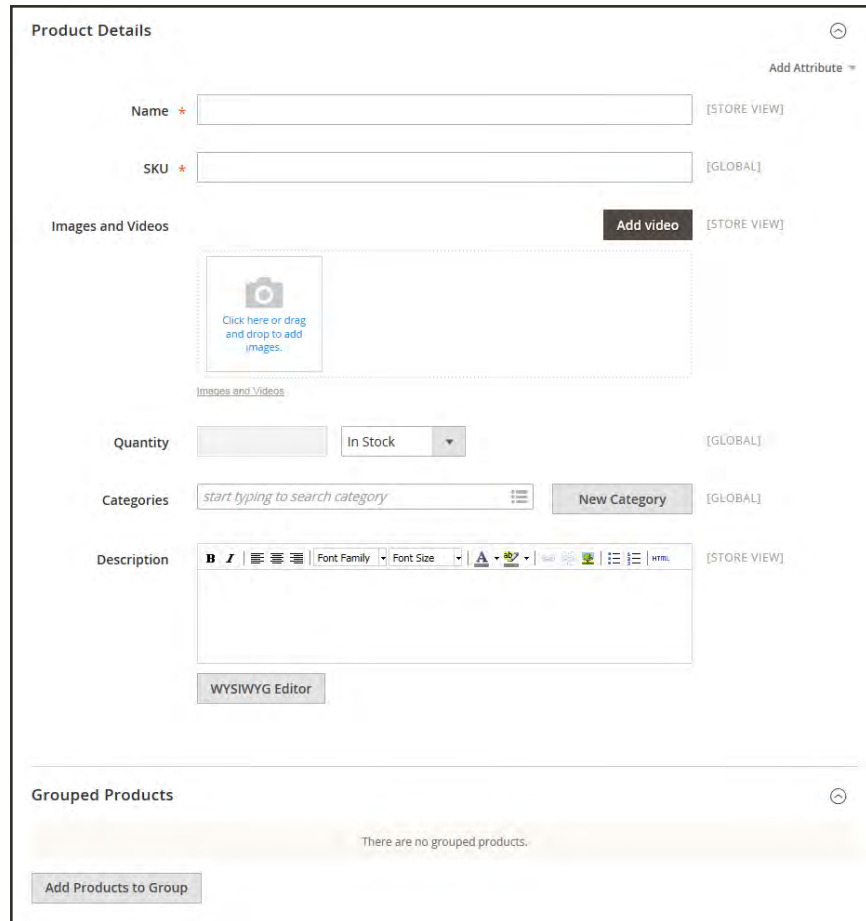
1. To add an image that represents the product group, do one of the following:
 - Drag an image from your desktop, and drop it on the **camera**  tile in the Images and Videos box.
 - In the Images and Videos box, tap the **camera**  tile, and navigate to the image file on your computer. Then, select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

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



Add Categories

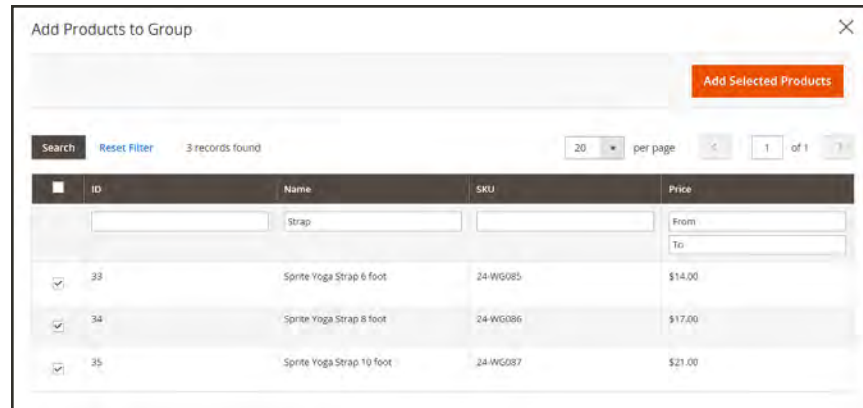
4. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, for additional control.




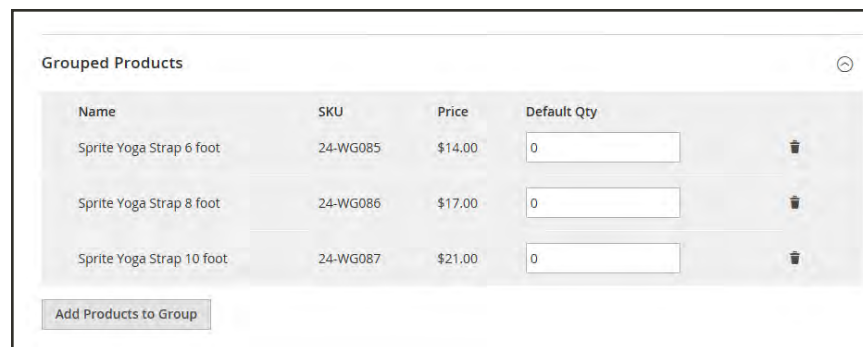
Product Details

Step 5: Add the Grouped Products

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




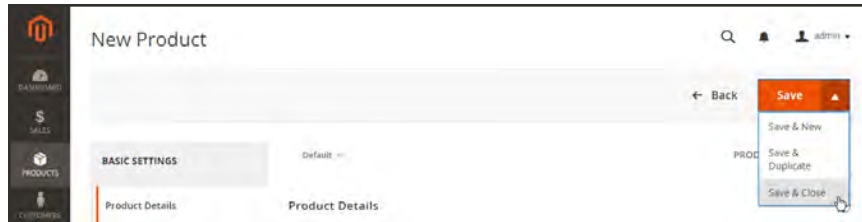
4. Tap **Add Selected Products** to add them to the grouped product. Then, do any of the following:
- To specify a default quantity for any of the items, enter the number in the **Default Qty** field.
 - To remove any product from the list, tap the **Delete**  icon.



Products Added

Step 6: Publish the Product


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

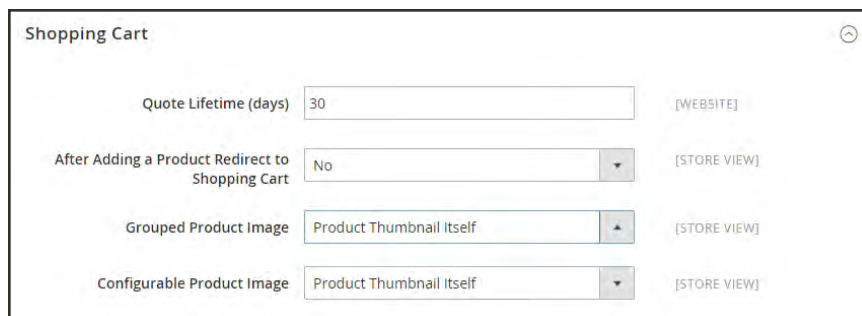


Save & Close

Step 7: Configure the Shopping Cart Thumbnails (Optional)

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

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



Shopping Cart

Step 8: View the Product in Your Store

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



Customer View

THINGS TO REMEMBER

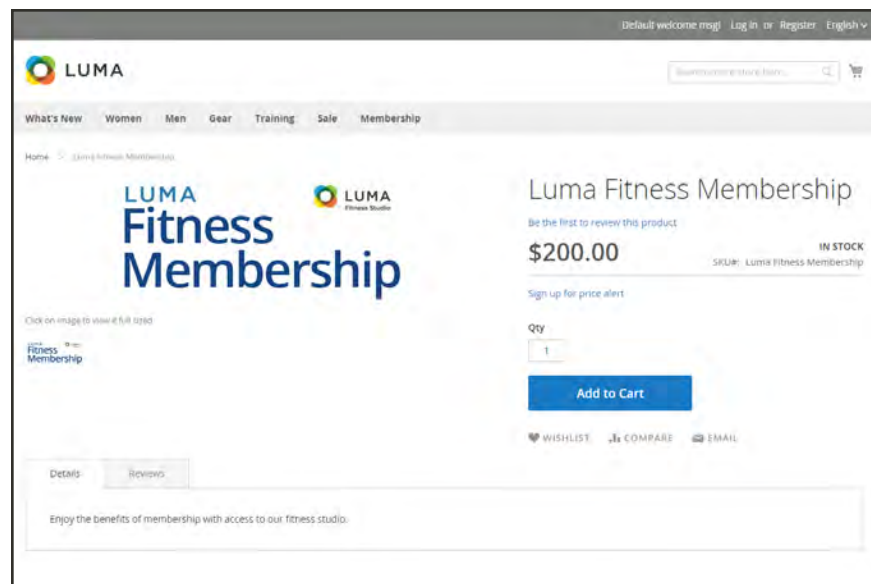
- ☑ A grouped product is essentially a collection of simple associated products.
- ☑ Simple and virtual products that are part of a grouped product cannot have custom options.
- ☑ Each item purchased appears individually in the shopping cart, rather than as part of the group.
- ☑ The thumbnail image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

Virtual Product

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

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

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



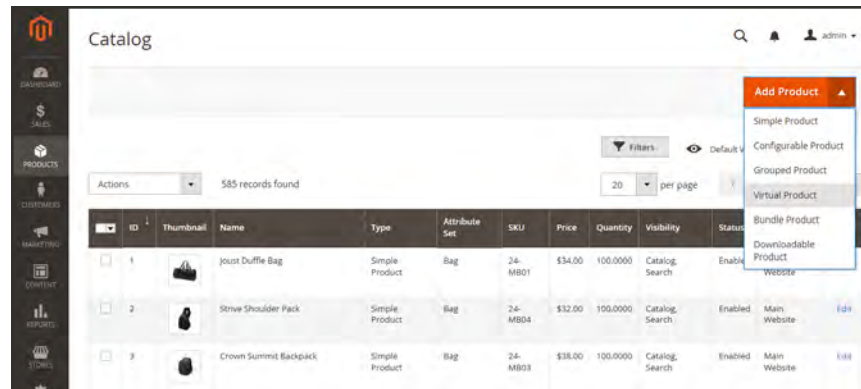
Virtual Product

Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Product Template** (Optional)
- Step 3: **Complete the Required Fields**
- Step 4: **Complete the Remaining Product Details**
- Step 5: **Publish the Product**
- Step 6: **View the Product in Your Store**

Step 1: Choose the Product Type

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



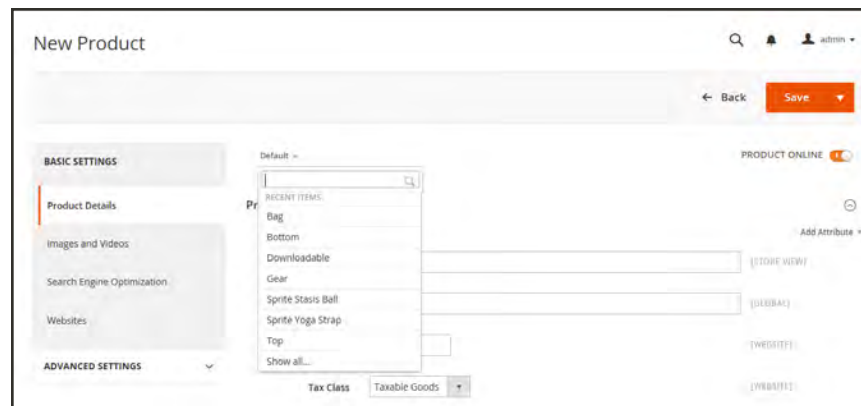
Add Virtual Product

Step 2: Choose the Product Template (Optional)

To choose the product template, do one of the following:


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

The form is updated to reflect the template.



Choose Template

Step 3: Complete the Required Fields



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

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


Step 4: Complete the Remaining Product Details

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

To learn about requirements for the taxation of digital goods and services, see the white paper, [Identification & Taxability of Digital Products](#) on the Avalara site.

2. If you're ready to add Images, do one of the following:
 - Drag an image from your desktop, and drop it on the **camera**  tile in the Images and Video box.
 - In the Images and Video box, tap the **camera**  tile, and navigate to the image file on your computer. Then, select the image, and tap **Open**.

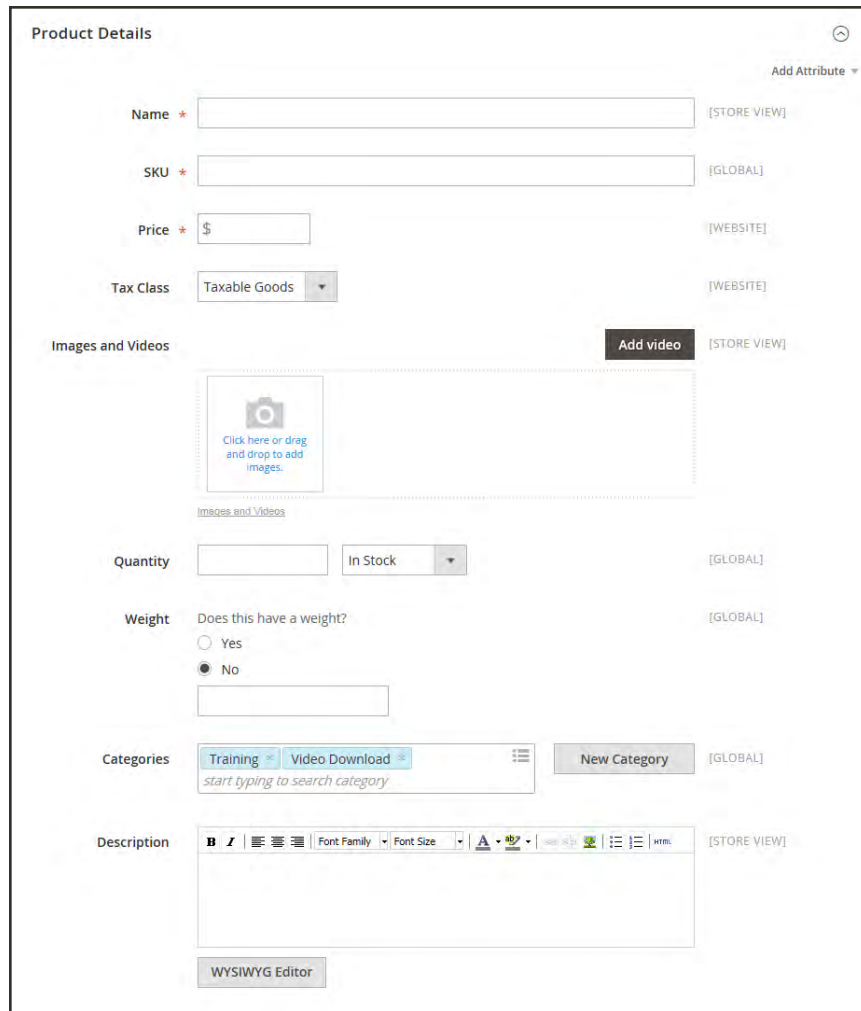
A **placeholder** appears until a product image is uploaded.

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





Choose Category

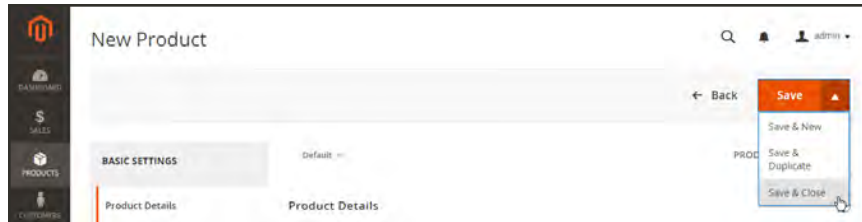
- 5. Enter the product **Description** directly into the text box, and format as needed. Then, tap **Submit**. You can also use the **WYSIWYG Editor**, for additional control.



Product Details

Step 5: Publish the Product

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



Save & Close




Step 6: View the Product in Your Store

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



Customer View

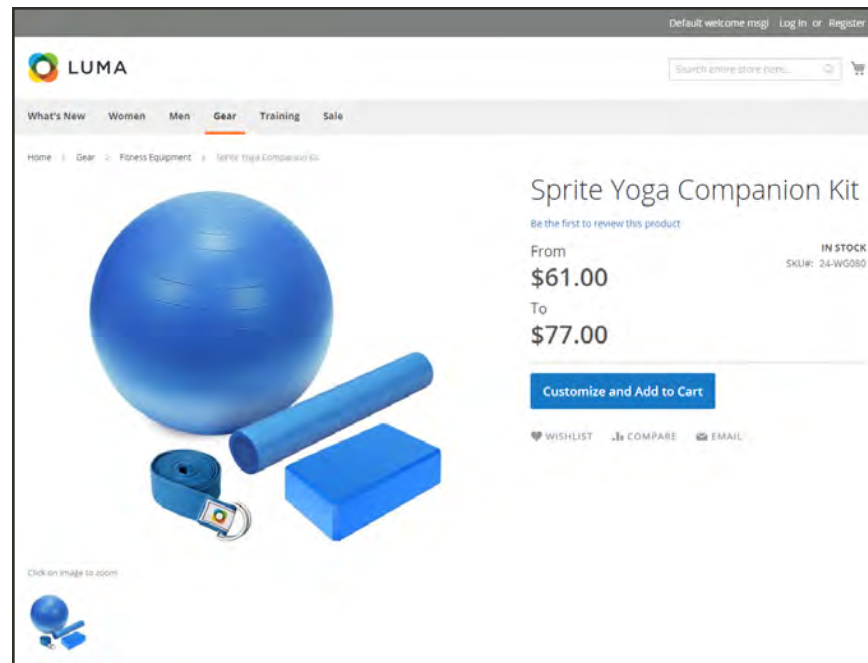
THINGS TO REMEMBER

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

Bundle Product

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

- **Simple Product**
- **Virtual Product**

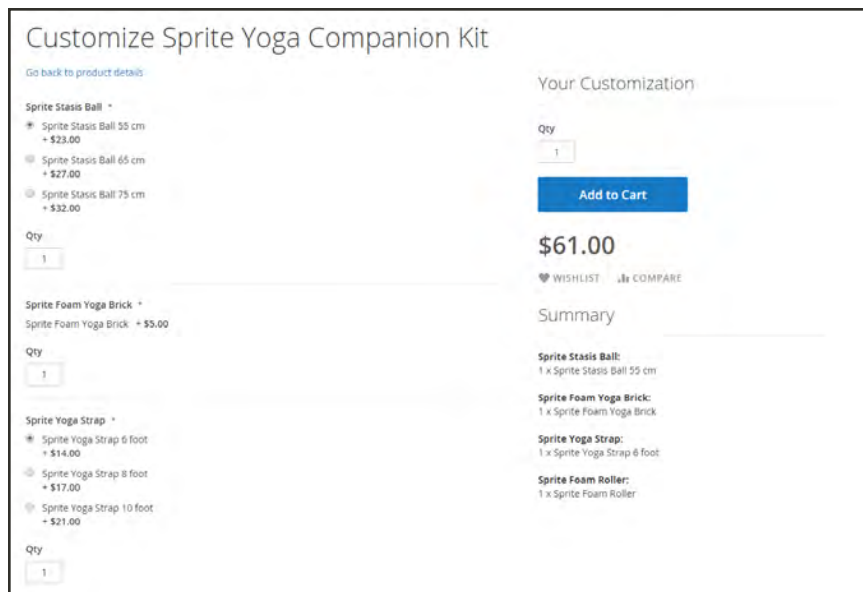


Bundle Product

Customizing the Bundle

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

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



Customize Bundle

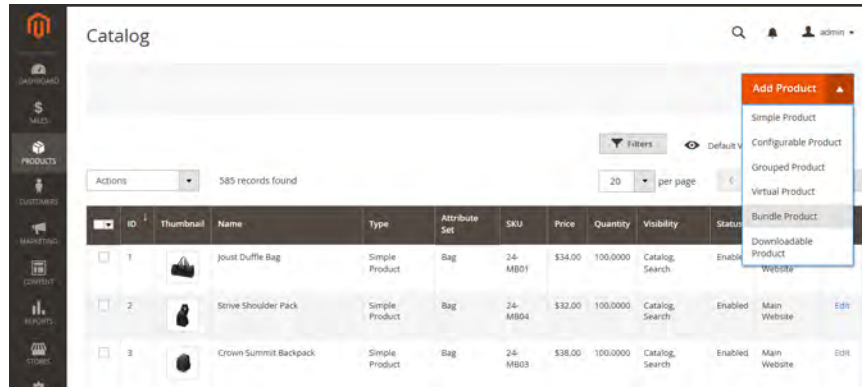
The following instructions walk you through the process of creating a bundle product with the basic settings. After you complete the required settings and save the product, you can complete the remaining information as needed.

Process Overview:

- Step 1: [Choose the Product Type](#)
- Step 2: [Choose the Product Template](#)
- Step 3: [Complete the Required Fields](#)
- Step 4: [Complete the Remaining Product Details](#)
- Step 5: [Add the Bundle Items](#)
- Step 6: [Publish the Product](#)
- Step 7: [View the Product in Your Store](#)

Step 1: Choose the Product Type

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



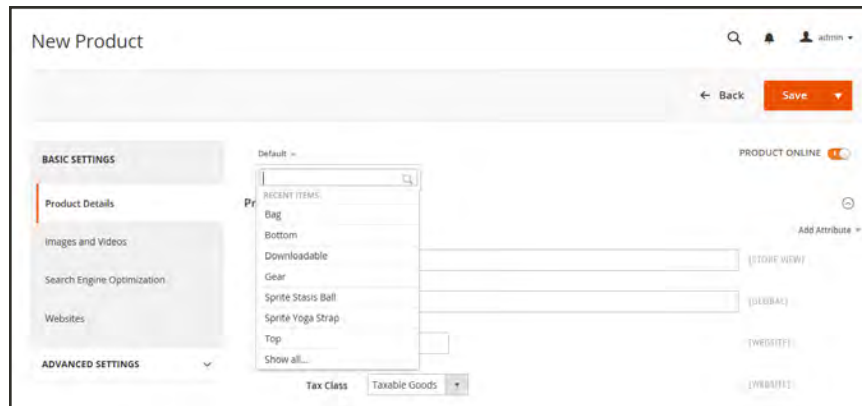
Add Bundle Product

Step 2: Choose the Product Template

To choose the product template, do one of the following:

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

The form is updated to reflect the template.



Choose Template

Step 3: Complete the Required Fields



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

The screenshot shows two rows of input fields. The first row is for 'SKU' with a red asterisk, an empty text box, a 'Dynamic' dropdown menu, and a '[GLOBAL]' label. The second row is for 'Price' with a red asterisk, a text box containing a dollar sign '\$', a 'Dynamic' dropdown menu, and a '[WEBSITE]' label.

Dynamic or Fixed SKU and Price

2. Because the product is not yet ready to publish, set the **Product Online** switch to the “Off” position.
 3. Tap **Save** and continue with the next step.
- Now that the required fields are complete, the product can be saved whenever needed.

Step 4: Complete the Remaining Product Details


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

A **placeholder** appears until a product image is uploaded.
3. The **Quantity** field is grayed out because the value is determined by each item in the bundle.

4. To choose how **Weight** is determined for shipping, do one of the following:
 - If you want the weight to change according to the options included, choose “Dynamic.”
 - For a set product weight, choose “Fixed,” and enter the **Weight**.



Dynamic or Fixed Weight

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



Categories

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

The screenshot shows the 'Product Details' form for a bundle product. It includes the following fields and options:

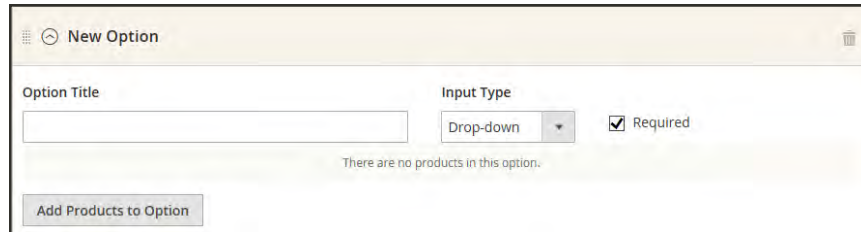
- Name:** Text input field with a '[STORE VIEW]' label.
- SKU:** Text input field with a 'Dynamic' dropdown menu and a '[GLOBAL]' label.
- Price:** Text input field with a '\$' symbol, a 'Dynamic' dropdown menu, and a '[WEBSITE]' label.
- Tax Class:** Dropdown menu with 'None' selected and a '[WEBSITE]' label.
- Images and Videos:** A section with an 'Add video' button and a large area for adding images. A placeholder text says 'Click here or drag and drop to add images.'
- Quantity:** Text input field with an 'In Stock' dropdown menu and a '[GLOBAL]' label.
- Weight:** Text input field with a 'Dynamic' dropdown menu and a '[GLOBAL]' label.
- Categories:** A category selection area with 'Gear' and 'Fitness Equipment' selected, a 'New Category' button, and a '[GLOBAL]' label.
- Description:** A large text area with a 'WYSIWYG Editor' button and a '[STORE VIEW]' label.
- Bundle Items:** A section with a 'Ship Bundle Items' dropdown menu set to 'Together' and a 'Create New Option' button.

Bundle Details

Step 5: Add the Bundle Items

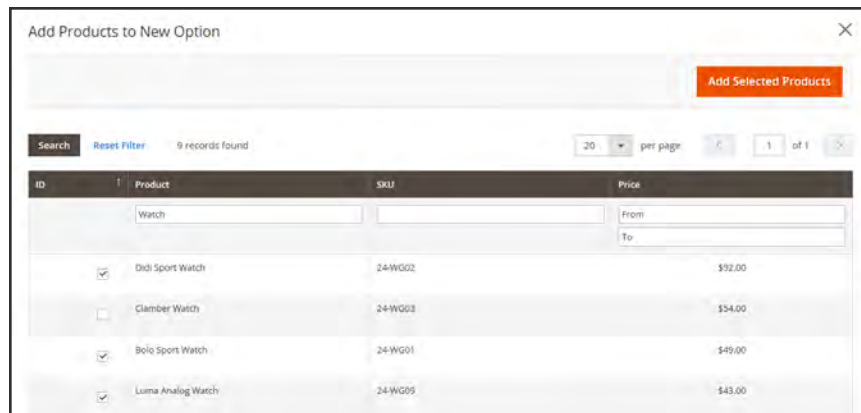
1. In the Bundle Items section, set **Ship Bundle Items** to one of the following:
 - Separately
 - Together
2. Tap **Create New Option**. Then, do the following:
 - a. Enter an **Option Title** to be used field label.
 - b. Set **Input Type** to one of the following:

- Drop-down
 - Radio buttons
 - Checkbox
 - Multiple Select
- c. To make the field a required entry, mark the **Required** checkbox.



New Option

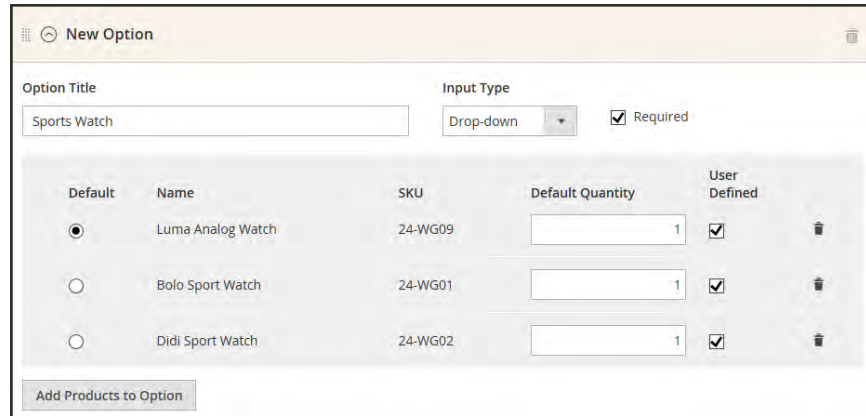
- d. Tap **Add Products to Option**. Then, mark the checkbox of each product that you want to include in this option. If there are many products, use the **list filters** and **pagination controls** to find the products you need.
- e. Tap **Add Selected Products**.



Add Selected Products

- f. Choose one item to be the **Default** selection.
- g. In the **Default Quantity** column, enter the quantity of each item that is to be added to the bundle when a customer chooses the item.
- h. To prevent customers from changing the quantity of any item, clear the **User Defined** checkbox of any item that you do not want changed. By default, the quantity of all items can be changed.
3. Repeat these steps for each item you want to add to the bundle.
 4. To remove any item from the bundle, tap the **Delete** icon.
 5. Repeat these steps to add as many options as needed in the bundle.

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



Option Items

Step 6: Publish the Product

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



Save & Close

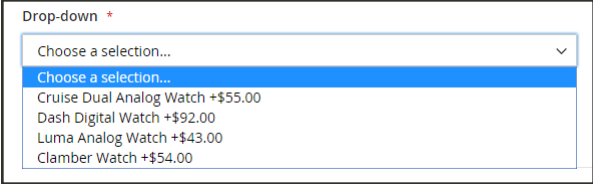


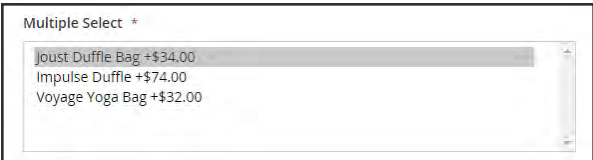
Step 7: View the Product in Your Store

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



Customer View







Input Controls

CONTROL	DESCRIPTION
<p>Drop-down</p>	<p>Displays a drop-down list of options with the product name and price. Only one item can be selected.</p> 
<p>Radio Buttons</p>	<p>Displays a radio button for each option, followed by the product name and price. Only one item can be selected.</p> 
<p>Checkbox</p>	<p>Displays a checkbox for each option, followed by the product name and price. Multiple items can be selected.</p> 
<p>Multiple Select</p>	<p>Displays a list of options with the product name and price. To select multiple items, hold down the Ctrl (or Option) key, and click each item.</p> 

Field Descriptions

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

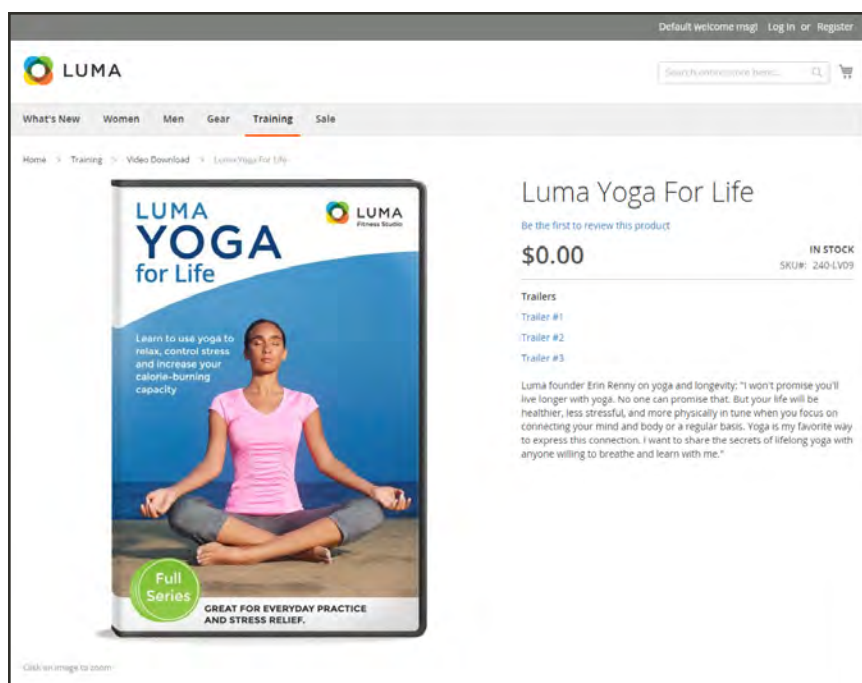
THINGS TO REMEMBER

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

Downloadable Product

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

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



Downloadable Product


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

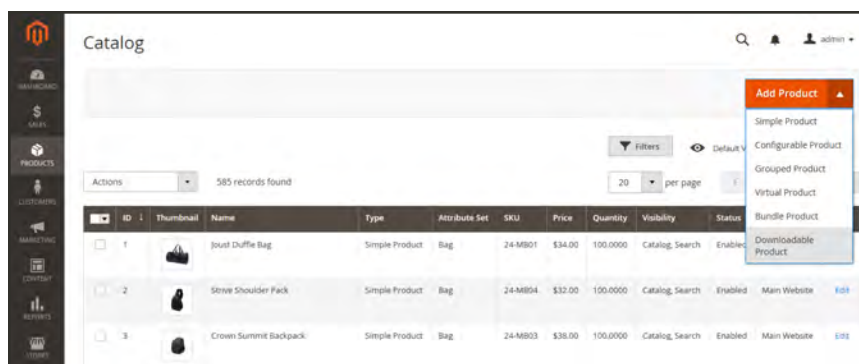
The following instructions take you through the process of creating a downloadable product with the basic fields. After you complete the required settings and save the product, you can add images and complete the remaining product information as needed.

Process Overview:

- Step 1: **Choose the Product Type**
- Step 2: **Choose the Product Template**
- Step 3: **Complete the Required Fields**
- Step 4: **Complete the Remaining Product Details**
- Step 5: **Complete the Downloadable Information**
- Step 6: **Publish the Product**
- Step 7: **View the Product in Your Store**

Step 1: Choose the Product Type

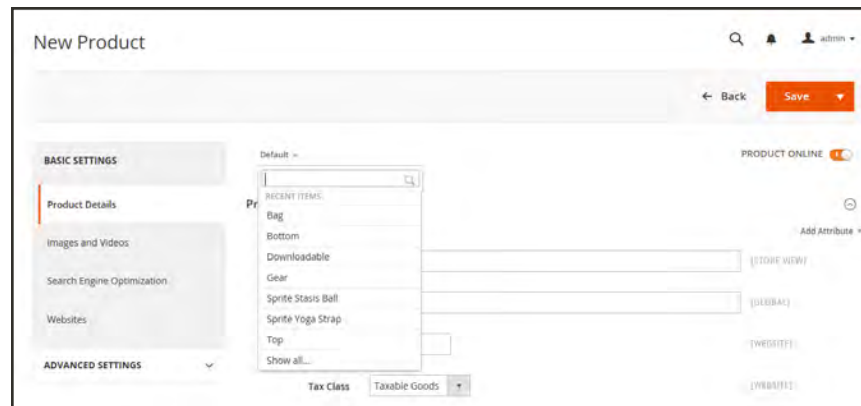
1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. In the upper-right corner on the **Add Product**  menu, choose **Downloadable Product**.

*Add Downloadable Product***Step 2: Choose the Product Template** (Optional)

The sample data includes a product template called “Downloadable” that has special fields for downloadable products. You can use an existing template, or create another before the product is saved. To use an existing template, do one of the following:

- In the **Search** box, enter the name of the template.
- In the list, choose the Downloadable template.

The form is updated to reflect the template.



Choose Template

Step 3: Complete the Required Fields

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

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



Step 4: Complete the Remaining Product Details

1. Set **Tax Class** to one of the following:


- None
- Taxable Goods

To learn about requirements for the taxation of digital goods and services, see the white paper, [Identification & Taxability of Digital Products](#) on the Avalara site.

2. If you're ready to add a product image, do one of the following:

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

A **placeholder** appears until a product image is uploaded.

3. If applicable, enter the **Quantity** of the product that is currently available for download.
4. Skip the **Weight** field, and mark the **Virtual / Downloadable** checkbox, if necessary.
5. To assign the product to a **Category**, do one of the following:
 - Start typing to find a match. Then, choose the **Category**.
 - Tap the Show List  icon to view the Category tree. Then, drill down through the available categories, and tap each category that you want to assign to the product.
 - Tap **New Category**. Enter the **Category Name** and choose the **Parent Category** to determine its position in the menu structure. Then, tap **Create Category**.



Choose Category

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

The screenshot shows the 'Product Details' form with the following fields and sections:

- Name ***: Text input field with a '[STORE VIEW]' label.
- SKU ***: Text input field with a '[GLOBAL]' label.
- Price ***: Text input field with a '\$' symbol and a '[WEBSITE]' label.
- Tax Class**: Dropdown menu set to 'Taxable Goods' with a '[WEBSITE]' label.
- Images and Videos**: A large dashed box for media with an 'Add video' button and a '[STORE VIEW]' label. Below it is a camera icon and the text 'Click here or drag and drop to add images.' and a '[GLOBAL]' label.
- Quantity**: Text input field and a dropdown menu set to 'In Stock' with a '[GLOBAL]' label.
- Weight**: Radio buttons for 'Does this have a weight?' with 'Yes' and 'No' options, and a text input field below. The 'No' option is selected. A '[GLOBAL]' label is present.
- Categories**: Text input field with a search prompt 'start typing to search category', a dropdown arrow, and a 'New Category' button. A '[GLOBAL]' label is present.
- Description**: A rich text editor with a toolbar (bold, italic, underline, font family, font size, text color, background color, link, unlink, list, link, html) and a 'WYSIWYG Editor' button. A '[STORE VIEW]' label is present.
- Downloadable Information**: A section header at the bottom of the form with a '[GLOBAL]' label.

Product Details

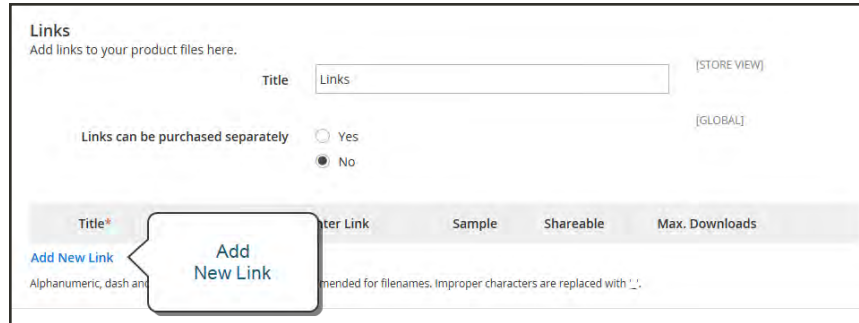
Step 5: Complete the Downloadable Information

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

Links

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

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



Links Title

3. Click **Add New Link**. Then, do the following:

- Enter the **Title** and **Price** of the download.
- Choose one of the following distribution methods:

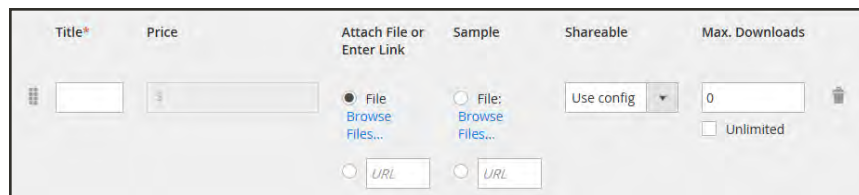
- | | |
|-------------|---|
| Attach File | Choose the File option. Then, browse to the file, and select it to upload. |
| Enter Link | Choose the URL option, Then, enter the full URL to the download file. |

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

- | | |
|-----|---|
| No | Requires customers to log in to their accounts to access the download link. |
| Yes | Sends the link by email, which customers can share with others. |

d. Do one of the following:

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



Link Detail

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

Samples

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


Samples

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

Attach File Choose the **File** option. Then, browse to the file, and select it to upload.



Enter Link Choose the **URL** option. Then, enter the full URL to the sample file.

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

- c. To add another sample, tap **Add New Row**, and repeat these steps.
- d. To change the order of the samples, tap the sort  icon, and drag the sample to a new position.

Sample Detail


Step 6: Publish the Product

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



Save & Close





Step 7: View the Product in Your Store

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



Customer View

THINGS TO REMEMBER

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

Download Options

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

To configure download options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Downloadable Product Options** section, and do the following:
 - a. To determine the stage in the order workflow when the download becomes available, set **Order Item Status to Enable Downloads** to one of the following:
 - Pending
 - Invoiced
 - b. To set a default limit on the number of downloads that a single customer can make, enter the number in the **Default Maximum Number of Downloads** field.
 - c. Set **Shareable** to one of the following:

Yes	Allows customers to email the download link to others.
No	Prevents customers from sharing the download link with others by requiring customers to log in to their accounts to access download links.
 - d. In the **Default Sample Title** field, enter the heading that you want to appear above the selection of samples.



Sample Title

- e. In the **Default Link Title** field, enter the default text that you want to use for download links.
 - f. If you want the download link to open in a new browser window, set **Opens Links in New Window** to “Yes.” This setting is used to keep the browser window to your store open.
 - g. To determine how downloadable content is delivered, set **Use Content Disposition** to one of the following:
 - Attachment Delivers the download link by email as an attachment.
 - Inline Delivers the download link as a link on a web page.
 - h. If you want to require that purchasers register for a customer account and log in before purchasing a download, set **Disable Guest Checkout if Cart Contains Downloadable Items** to “Yes.”
4. When complete, tap **Save Config.**

▼ Downloadable Product Options

Order Item Status to Enable Downloads	<input type="text" value="Invoiced"/>	[WEBSITE]
Default Maximum Number of Downloads	<input type="text" value="0"/>	[WEBSITE]
Shareable	<input type="text" value="No"/>	[WEBSITE]
Default Sample Title	<input type="text" value="Samples"/>	[STORE VIEW]
Default Link Title	<input type="text" value="Links"/>	[STORE VIEW]
Open Links in New Window	<input type="text" value="Yes"/>	[WEBSITE]
Use Content-Disposition	<input type="text" value="inline"/>	[STORE VIEW]
Disable Guest Checkout if Cart Contains Downloadable Items	<input type="text" value="Yes"/>	[WEBSITE]

▲ Guest checkout will only work with shareable.

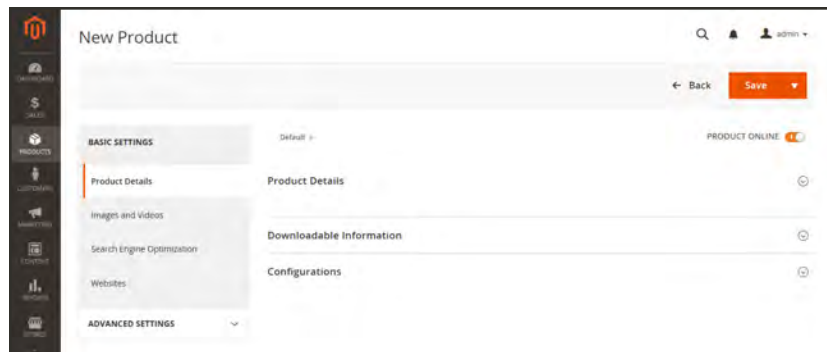
Downloadable Product Options



CHAPTER 12:

Basic Settings

The Basic Settings section is designed to help you create products quickly, and includes Product Details, Images and Videos, Search Engine Optimization, and Websites.



Basic Settings

Product Details

The Product Details section provides basic information about the product, and gives you the ability to add attributes and categories as you define the product. To learn more, see the instructions for each product type.

The screenshot shows the 'Product Details' configuration page. At the top right, there is a refresh icon and an 'Add Attribute' dropdown menu. The form contains several sections:

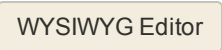
- Name:** A text input field with a red asterisk and a '[STORE VIEW]' label.
- SKU:** A text input field with a red asterisk and a '[GLOBAL]' label.
- Price:** A text input field with a '\$' symbol and a '[WEBSITE]' label.
- Tax Class:** A dropdown menu currently set to 'Taxable Goods' with a '[WEBSITE]' label.
- Images and Videos:** A section with an 'Add video' button and a '[STORE VIEW]' label. Below it is a large dashed box containing a camera icon and the text 'Click here or drag and drop to add images.' Below this box is a link labeled 'Images and Videos'.
- Quantity:** A text input field, an 'In Stock' dropdown menu, and a '[GLOBAL]' label.
- Weight:** A section with the question 'Does this have a weight?' and two radio buttons for 'Yes' (selected) and 'No'. Below is a text input field and a '[GLOBAL]' label.
- Categories:** A search input field with the placeholder 'start typing to search category', a 'New Category' button, and a '[GLOBAL]' label.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, link, unlink, font family, font size, background color, text color, bulleted list, numbered list, and source code. Below the editor is a 'WYSIWYG Editor' button and a '[STORE VIEW]' label.

Product Details

Field Descriptions (Default Template)

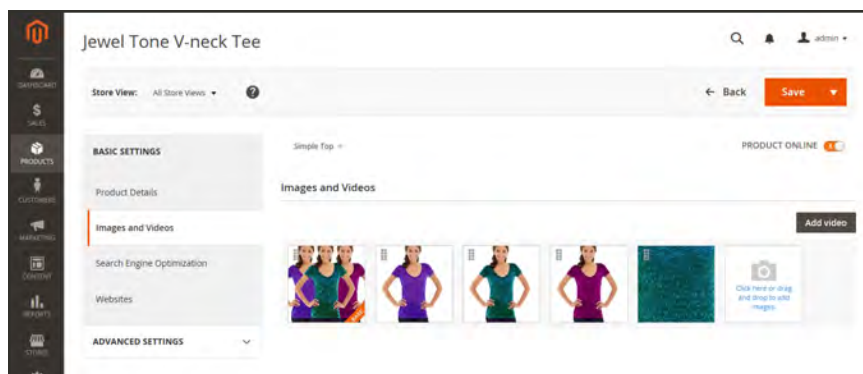
FIELD	SCOPE	DESCRIPTION
Name	Store View	(Required) The name of the product, as you want it to appear in the catalog.
SKU	Global	(Required) The Stock Keeping Unit is a unique identifier for each individual product or service provided. A default SKU is auto-generated, based on the product name.
Price	Website	(Required) The retail price of the product.
Tax Class	Website	The tax class that is associated with the product.
Images and Videos	Store View	<p>Displays the images and videos that are currently available for the product.</p> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px;">Add Video</div> <p>Associates a new video with the product.</p> </div>
Quantity	Global	The number of items currently in stock.
Weight	Global	Determines if the product has weight, and specifies the value for shipping calculations. In the United States, weight is measured in pounds and ounces, whereas countries on the metric system use grams and kilograms. The unit of measurement defined for your locale in the configuration.
Categories	Global	<p>Indicates the categories that are assigned to the product.</p> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-right: 10px;">New Category</div> <p>Assigns an additional category to the product.</p> </div>
Description	Store View	The main product description that appears on the product page. The product description is initially entered as plain text. The WYSIWYG Editor can be used to format the text with HTML tags, if permitted by the <code>description</code> attribute properties .

Field Descriptions (Default Template) (cont.)

FIELD	SCOPE	DESCRIPTION
		<p>Do not paste text directly from a word processor, because it might include print control codes that do not render correctly online. If using a word processor to compose the text, first save the description as a .txt file to strip out any control codes before copying and pasting it into the product description field.</p>
		<p> Launches the Editor in a pop-up window.</p>

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 size of the image container on the page is defined in the style sheet, but how the image is used is determined by the role that is assigned to the image. The main product image, or “base” image, must be large enough to produce the magnification that is needed for zoom. In addition to the main image, a smaller version of the same image might appear in product listings, or as a thumbnail in the shopping cart. You can upload an image in the largest size that is needed, and let Magento render the sizes needed for each use. The same image can be used for all roles, or a different image can be assigned to each role. By default, the first image that is uploaded is assigned to all three roles.

From the Product Detail section, you can perform basic image management tasks such as upload multiple images, link to video, rearrange their order, and determine how each is used. For additional control, open the image in “detail view.” If you have a large quantity of images to manage, it can be more efficient to import them as a batch, rather than upload individual images. To learn more, see: [Importing Product Images](#).

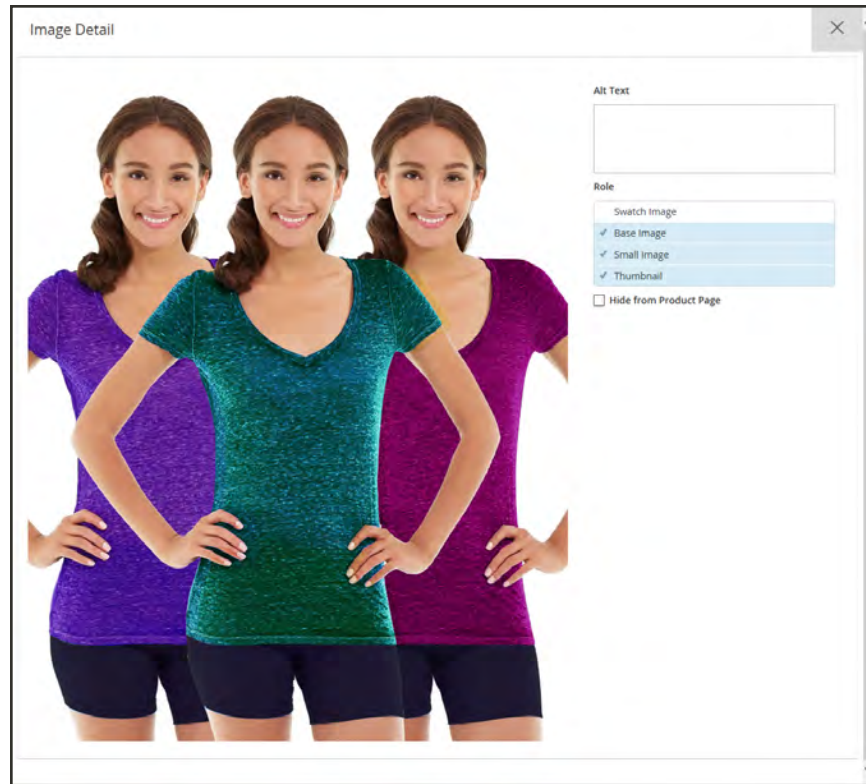




Image Detail

To manage images:

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


Upload an Image

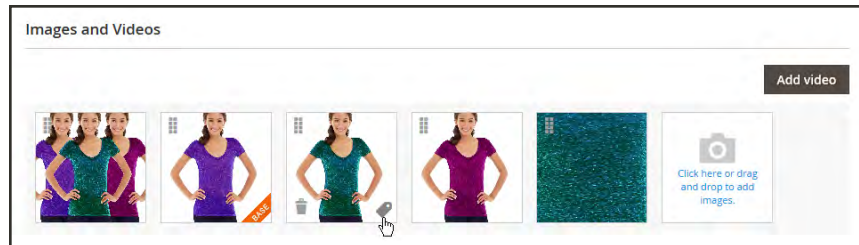
- Drag an image from your desktop, and drop it on the **camera**  tile in the Images and Videos box.
- In the Images and Video box, tap the **camera**  tile, and browse to the image file on your computer. Then, select the image, and tap **Open**.



Drag and Drop Image


Assign the Base Image

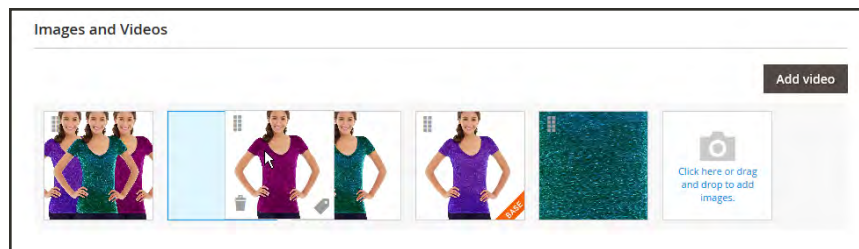
An orange banner appears in the lower-right corner of the current base image. To assign a different image as the base, move the mouse over the image that you want to use, and tap the tag icon  in the lower-right corner.



Make Base

Rearrange Images

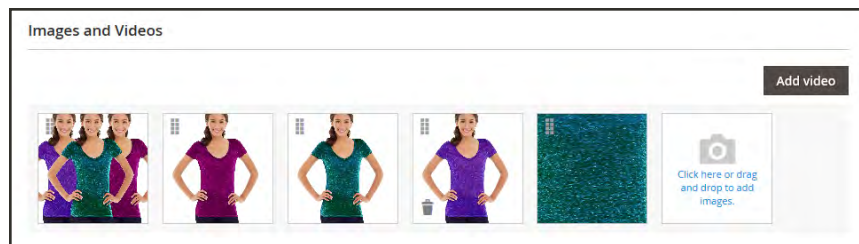
To change the order of images in the gallery, tap the **Sort**  icon at the bottom of the image. Then, drag the image to a different position in the Images box.



Change Order

Delete an Image

To remove an image, tap the **Delete**  icon in the lower-left corner of the image.



Remove Image

2. Tap **Save**

To view image detail:

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

Then, do any of the following:

Enter Alt Text

Image Alt text is referenced by screen readers to improve web accessibility, and by search engines when indexing the site. Some browsers display the Alt text on mouseover. Alt text can be several words long, and include carefully selected key words.

In the **Alt Text** box, enter a brief description of the image.

Assign Roles

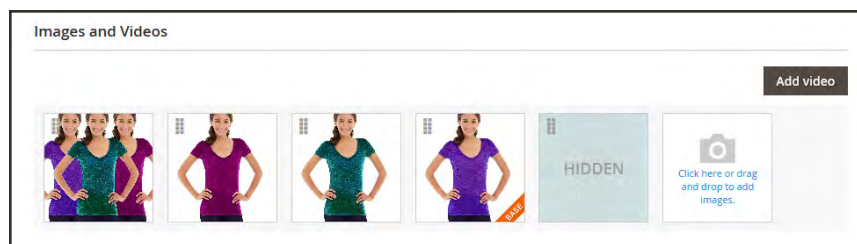
By default, all three roles are assigned to the first image that is uploaded to the product. To reassign a role to another image, do the following:

1. Tap an image tile to open the image in detail view.
2. In the **Role** box, choose the role that you want to assign to the image.

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

Hide Images

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



Hidden Image

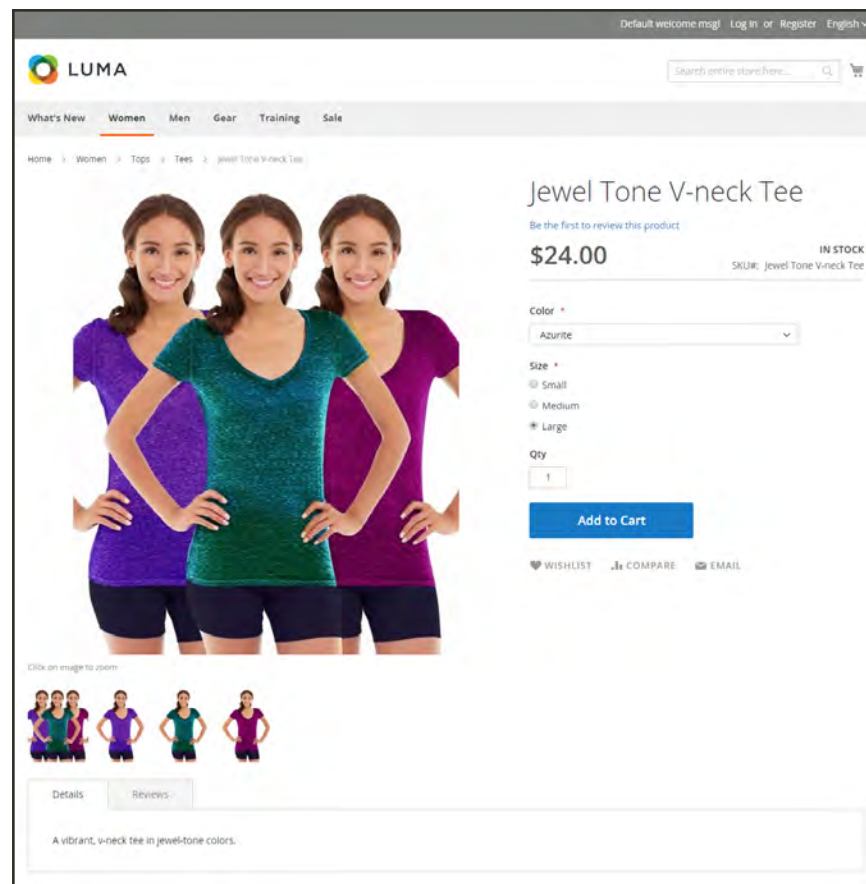
2. To exit Detail View, click the **Close** ✕ box in the upper-right corner.
3. When complete, tap **Save**.

Image Roles

IMAGE ROLE	DESCRIPTION
Swatch Images	A swatch image can be illustrate a color, texture, finish, or pattern. Swatch images that are specific to the product can be uploaded to the image gallery.
Base Image	The base image is the main image on the product detail page. Image zoom is activated if you upload an image that is larger image than the image container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)
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
Thumbnail	Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels

Media Gallery

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



Media Gallery

Image Zoom

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

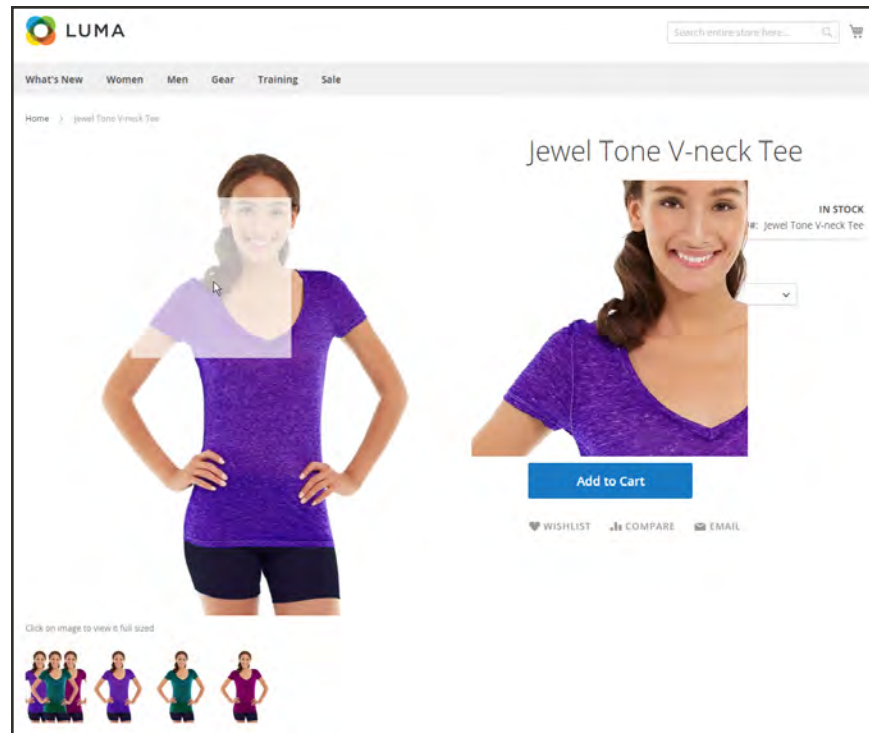


Image Zoom

Light Boxes and Sliders

There are many third-party light boxes and sliders that you can use to enhance the presentation of your product images. Look for extensions in [Magento Marketplace](#).


Adding Product Video

To add product video, you must first obtain an API Key from your Google account, and enter it in the configuration of your store. Then, you can link to the video from the product.

Step 1: Get Your YouTube API Key

1. Log in to your Google account, and visit the [Google Developers Console](#). Then, do the following:
 - a. Under Use Google APIs, click **Enable and manage APIs**.
 - b. In the panel on the left choose **Credentials**. Expand the Add Credentials menu, and choose **API key**.
 - c. When prompted to create a new key, choose **Server key**. Enter a name for the key, and tap **Create**.
2. Wait a few moments while the key is generated. Then, copy the key to the clipboard.
In the next step, you will paste the key into your store's configuration.

Step 2: Configure Magento

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Product Video** section. Then, paste your **YouTube API key**.



The screenshot shows a configuration panel titled "Product Video". Inside the panel, there is a text input field labeled "YouTube API key" and a button labeled "[STORE VIEW]".

Product Video

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

Step 3: Link to the Video

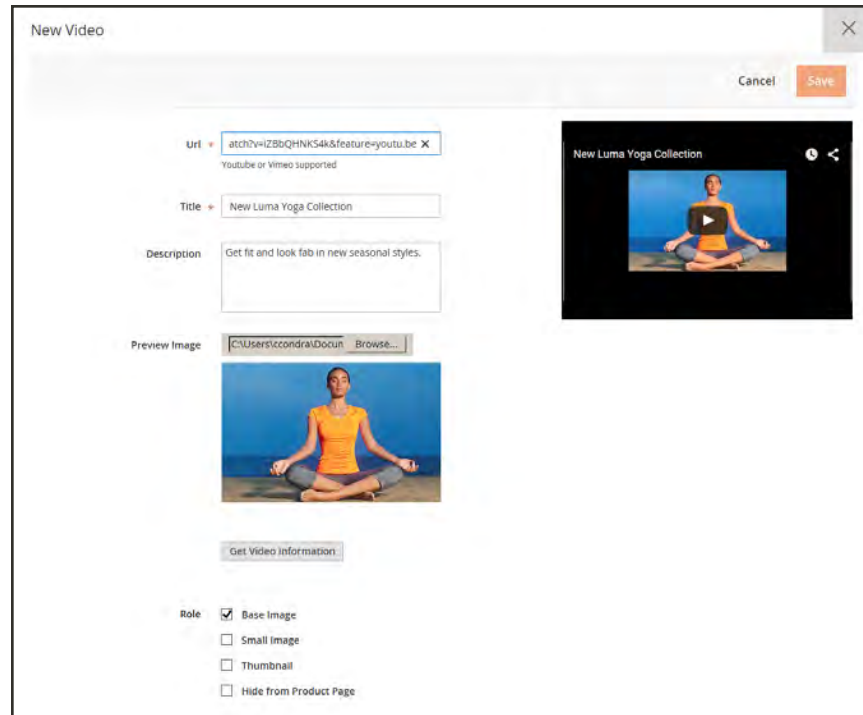
1. Open a product in edit mode. Then in the Images and Video section, tap **Add Video**.

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



Add Video

2. Enter the **URL** of the YouTube or Vimeo video.
3. Enter the **Title** and **Description** of the video.
4. To upload a **Preview Image**, browse to the image and select the file.
5. If you prefer to use the video meta data, tap **Get Video Information**.
6. To determine how the video is used in the store, mark the checkbox of each **Role** that applies:
 - Base Image
 - Small Image
 - Swatch Image
 - Thumbnail
 - Hide from Product Page
7. When complete, tap **Save**.



New Video

Field Descriptions

FIELD	DESCRIPTION
URL	The URL of the associated video.
Title	The video title.
Description	The video description.
Preview Image	An uploaded image that is used as a preview of the video in your store.
Get Video Information	Retrieves the video meta data that is stored on the host server. You can use the original data, or update it as needed.
Role	Determines how the preview image is used in your store. Options: Base Image Small Image Thumbnail Swatch Image Hide from Product Page

Placeholders

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

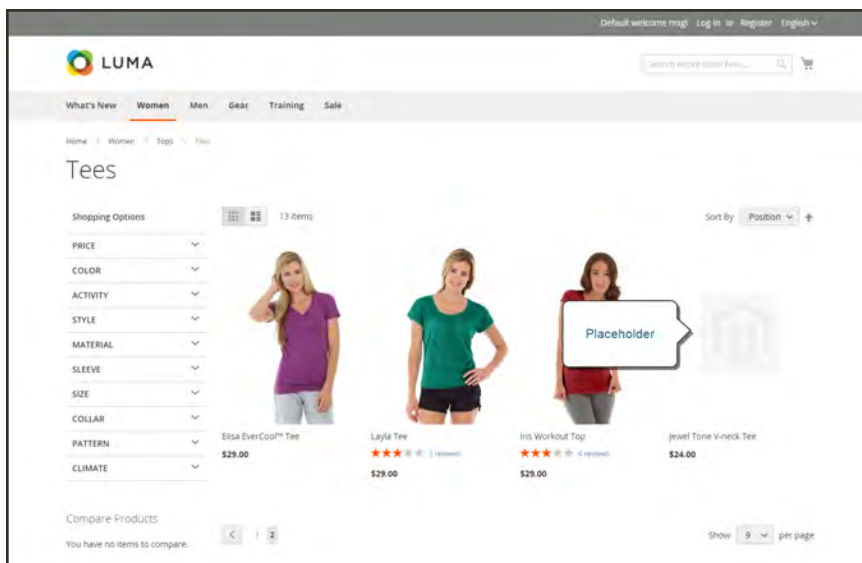

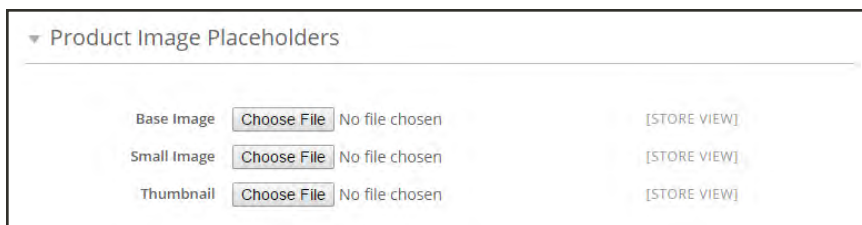


Image Placeholder

To upload placeholder images:

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



Product Image Placeholders

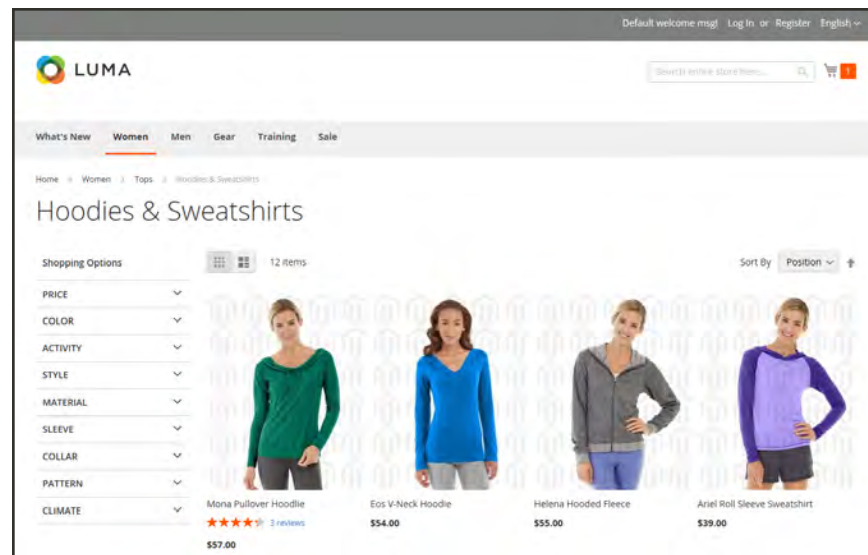
5. When complete, tap **Save**.

Watermarks

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

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

Product Image Watermarks ☺

Base Image Watermark Default Size	<input type="text"/>	[STORE VIEW]
	Example format: 200x300.	
Base Image Watermark Opacity, Percent	<input type="text"/>	[STORE VIEW]
Base Image Watermark	<input type="button" value="Choose File"/> No file chosen <small>Allowed file types: jpeg, gif, png.</small>	[STORE VIEW]
Base Image Watermark Position	Stretch <input type="button" value="v"/>	[STORE VIEW]
Small Image Watermark Default Size	<input type="text"/>	[STORE VIEW]
	Example format: 200x300.	
Small Image Watermark Opacity, Percent	<input type="text"/>	[STORE VIEW]
Small Image Watermark	<input type="button" value="Choose File"/> No file chosen <small>Allowed file types: jpeg, gif, png.</small>	[STORE VIEW]
Small Image Watermark Position	Stretch <input type="button" value="v"/>	[STORE VIEW]
Swatch Image Watermark Default Size	<input type="text"/>	[STORE VIEW]
	Example format: 200x300.	
Swatch Image Watermark Opacity, Percent	<input type="text"/>	[STORE VIEW]
Swatch Image Watermark	<input type="button" value="Choose File"/> No file chosen <small>Allowed file types: jpeg, gif, png.</small>	[STORE VIEW]
Swatch Image Watermark Position	Stretch <input type="button" value="v"/>	[STORE VIEW]
Thumbnail Watermark Default Size	<input type="text"/>	[STORE VIEW]
	Example format: 200x300.	
Thumbnail Watermark Opacity, Percent	<input type="text"/>	[STORE VIEW]
Thumbnail Watermark	<input type="button" value="Choose File"/> No file chosen <small>Allowed file types: jpeg, gif, png.</small>	[STORE VIEW]
Thumbnail Watermark Position	Stretch <input type="button" value="v"/>	[STORE VIEW]

Product Image Watermarks

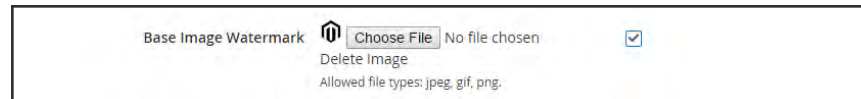
4. When complete, tap **Save Config**.
5. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.



Refresh Cache

To delete a watermark:

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



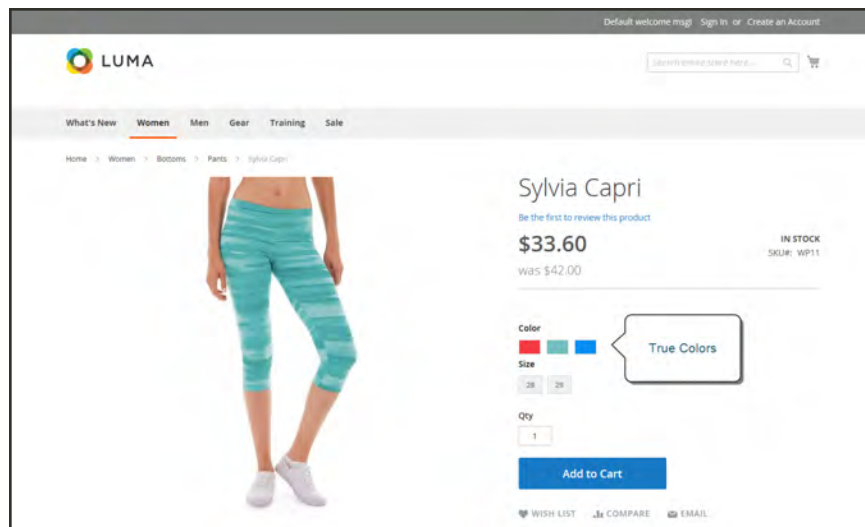
Delete Watermark

2. Tap **Save Config**. Then, do the following:
 - a. When prompted to refresh the cache, tap the **Cache Management** link in the system message. Then, refresh the invalid cache.
 - b. If the watermark image persists in the storefront, return to Cache Management and tap **Flush Magento Cache**.

Swatches

Customers have high expectations when it comes to color, and it is crucial that product descriptions accurately represent each available color, pattern, or texture. For example, the capris in the illustration below are not simply available in red, green, and blue. Rather, they are available only in very specific shades of red, green, and blue, which are probably unique to this product.

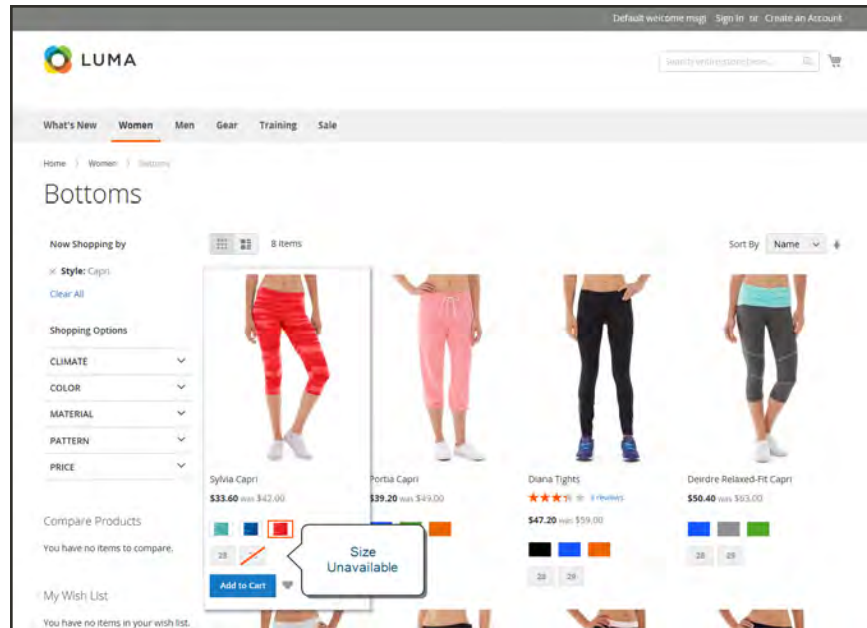
For **configurable products**, color can be indicated by a visual swatch, text swatch, or a drop-down input control. Swatches can be used on the product page, in product listings, and in **layered navigation**. On the product page, swatches are synchronized to display the corresponding product image when the swatch is chosen. When chosen, the corresponding value appears in the input field, and the swatch is outlined as the current selection.



Swatches on Product Page

Text-Based Swatches

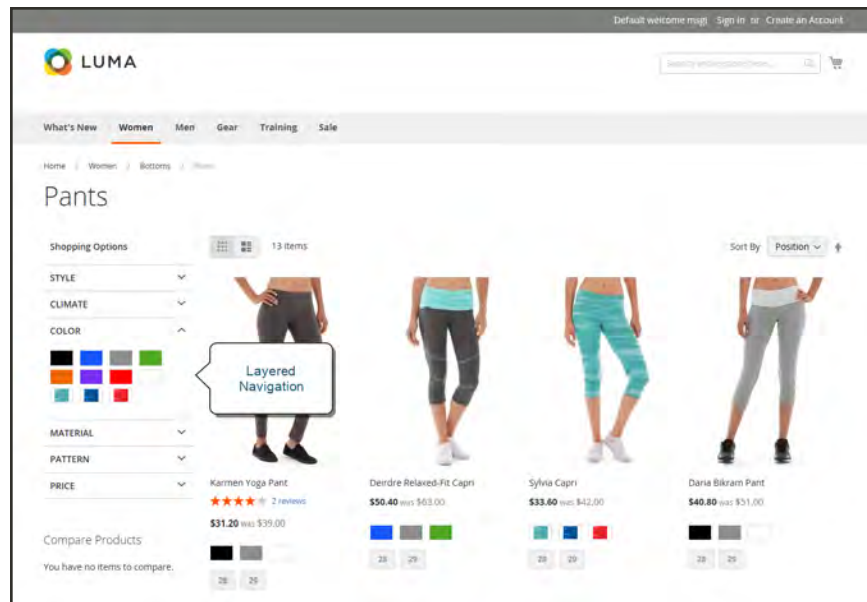
If an image isn't available for a swatch, the attribute value appears as text. A text-based swatch is like a button with a text label, and behaves in the same way as a swatch with an image. When text-based swatches are used to show the available sizes, any size that is not available is crossed out.



Text-Based Swatches for Size

Swatches in Layered Navigation

Swatches can also be used in layered navigation, provided that the Use in Layered Navigation property of the color attribute is set to “Yes.” The following example shows both text-based and color image swatches in layered navigation.



Swatches in Layered Navigation

Creating Swatches

Swatches can be defined as a component of the `color` attribute, or set up locally for a specific product as uploaded [product images](#).

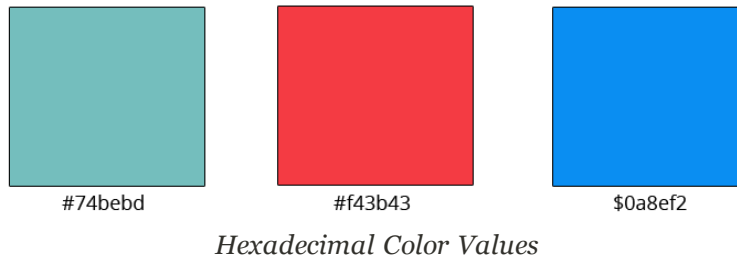
In the following examples, the Sylvia Capris are available in specific values of red, green, and blue. Because the swatches were taken from the product image, each is a true representation of the color. The `color` attribute is used to manage the information for all product colors and swatches.

Step 1: Create the Swatches

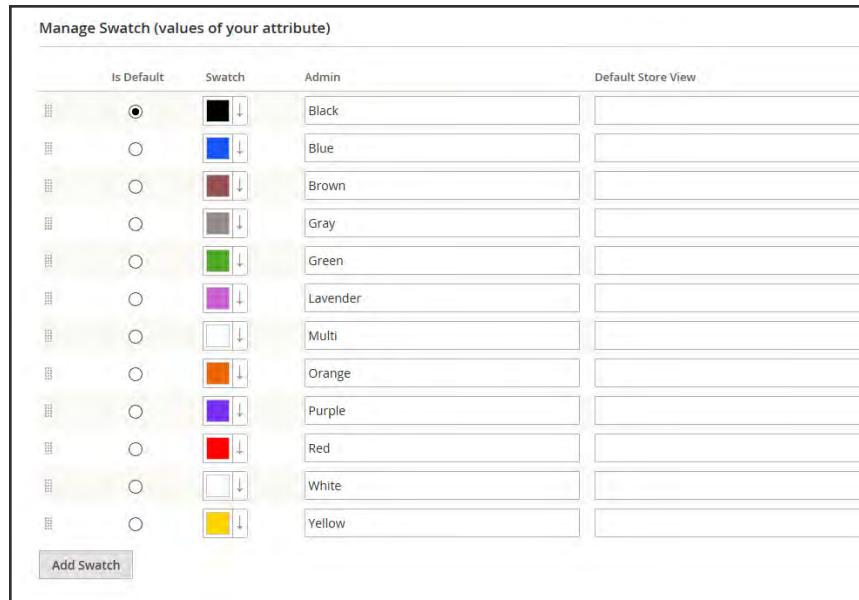
Use either of the following methods to create swatches for your products:

Method 1: Add a Color Swatch

1. To capture the true color of a product, open the image in a photo editor and use the eye dropper tool to identify the exact color. Then, take note of the equivalent hexadecimal value.



2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
3. In the grid, open the **color** attribute in edit mode.
4. Verify that **Catalog Input Type for Store Owner** is set to "Visual Swatch."
5. Under **Manage Swatch** (values of your attribute.) tap **Add Swatch** to add a new definition to the bottom of the list. Then, do the following:



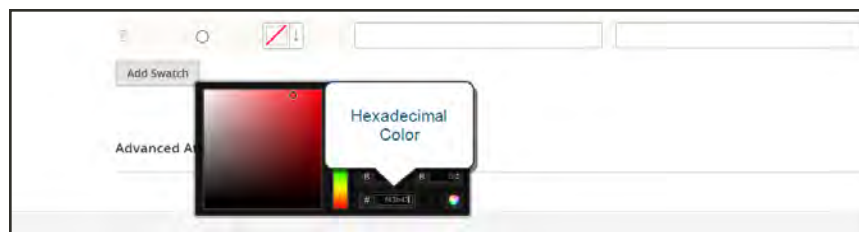
Manage Swatch Values

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



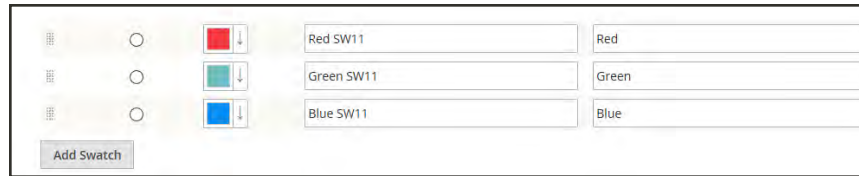
Choose a Color

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



- c. To save the swatch, tap the Color Wheel button in the lower-right corner of the color picker.
- d. Enter the labels for the Admin and Storefront. In this example, we include the SKU in the admin label for reference because these colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.
- e. Under **Is Default**, select the swatch that you want to use as the default option.

- f. To change the order, simply drag the 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

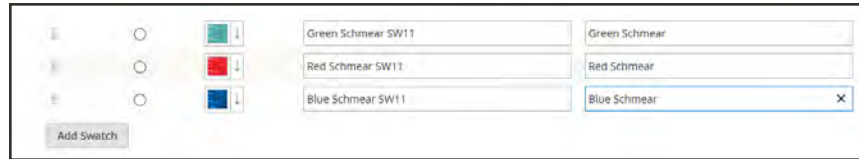
- 2. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Product**.
- 3. In the grid, open the **color** attribute in edit mode.
- 4. Verify that **Catalog Input Type for Store Owner** is set to “Visual Swatch.”
- 5. Under **Manage Swatch** (values of your attribute.) tap **Add Swatch** to add a new definition to the bottom of the list. Then, do the following:
 - a. On the swatch menu, choose **Upload a file**.



Upload a File

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

- c. Repeat these steps for each swatch image.
- d. Enter the labels for the Admin and Storefront. In this example, we include the SKU in the admin label for reference because these colors are used only for a specific product. You can include a space or underscore in the label, but not a hyphen.

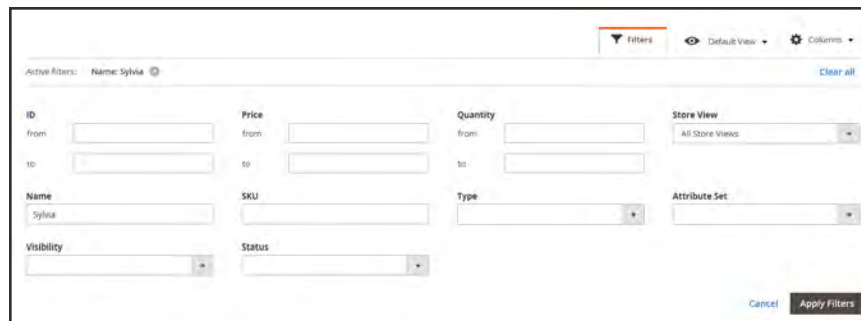


Enter Labels

- 6. When complete, tap **Save Attribute**. Then when prompted, refresh the cache.
- 7. The last step is to open each product in Edit mode, and update the Color attribute with the correct swatch. To update multiple products at the same time, follow the steps below.

Step 2: Update Your Products

- 1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
- 2. **Filter** the list by Name or SKU to include only the applicable products. The following example filters the list on a partial product name.



Filters

- 3. In the grid, mark the checkbox of each product to which the swatch applies. In this example, all blue capris are selected. Then, set the **Actions** control to “Update Attributes.”

Actions		7 records found (2 selected)										20 per page		1 of 1	
		Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action				
<input type="checkbox"/>	1891		Sylvia Capri-29-Green	Simple Product	Bottom	WP11-29-Green	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit			
<input checked="" type="checkbox"/>	1890		Sylvia Capri-29-Blue	Simple Product	Bottom	WP11-29-Blue	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit			
<input type="checkbox"/>	1889		Sylvia Capri-28-Red	Simple Product	Bottom	WP11-28-Red	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit			
<input type="checkbox"/>	1888		Sylvia Capri-28-Green	Simple Product	Bottom	WP11-28-Green	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit			
<input checked="" type="checkbox"/>	1887		Sylvia Capri-28-Blue	Simple Product	Bottom	WP11-28-Blue	\$42.00	100.0000	Not Visible Individually	Enabled	Main Website	Edit			
<input type="checkbox"/>	1893		Sylvia Capri	Configurable Product	Bottom	WP11	\$42.00	0.0000	Catalog Search	Enabled	Main Website	Edit			

Update Attributes

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

Color Blue SW11 [GLOBAL]
 Change

Change

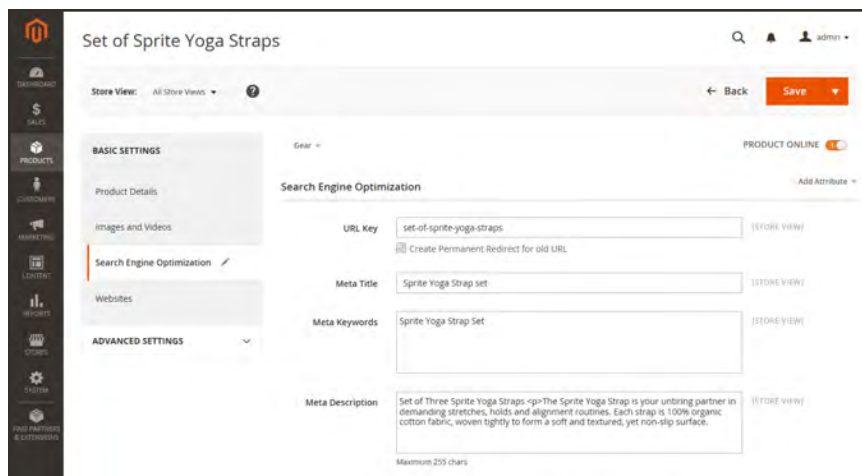
- 5. Choose the swatch that applies to the selected products, and tap **Save**. Then when prompted, refresh the cache.



Swatch in Storefront

Search Engine Optimization

The Search Engine Optimization page of basic product settings includes the primary fields used by search engines to index the product. Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in both the meta title and meta description. The default value for each meta data field is auto-generated based on the configuration setting. Each field contains a placeholder that is replaced by an actual value. To learn more, see: [Default Field Values](#) .



The screenshot displays the Magento 2 admin interface for the 'Set of Sprite Yoga Straps' product. The left sidebar contains navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Analytics, Websites, Orders, System, and Reports & Extensions. The main content area is titled 'Set of Sprite Yoga Straps' and includes a 'Store View' dropdown set to 'All Store Views'. Below this, there are 'Back' and 'Save' buttons. The 'BASIC SETTINGS' section is active, with 'Search Engine Optimization' selected. The 'Search Engine Optimization' section contains the following fields:

- URL Key:** set-of-sprite-yoga-straps (STORE VIEW)
- Create Permanent Redirect for old URL
- Meta Title:** Sprite Yoga Strap set (STORE VIEW)
- Meta Keywords:** Sprite Yoga Strap Set (STORE VIEW)
- Meta Description:** Set of Three Sprite Yoga Straps ->The Sprite Yoga Strap is your unbring partner in demanding stretches, holds and alignment routines. Each strap is 100% organic cotton fabric, woven tightly to form a soft and textured, yet non-slip surface. (STORE VIEW)

Maximum 255 chars

Search Engine Optimization

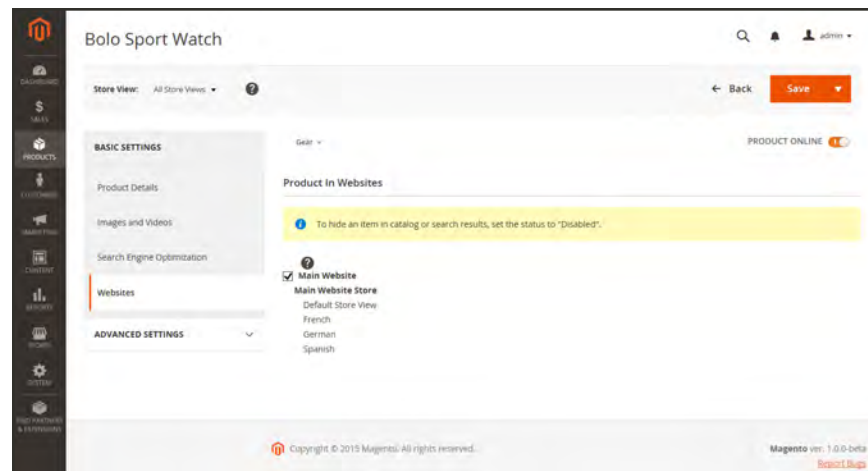
Field Descriptions

FIELD	SCOPE	DESCRIPTION
URL Key	Store View	<p>Determines the online address of the product. The URL key is added to the base URL of the store, and appears in the address bar of a browser. Magento initially creates a default, “search engine friendly” URL, that is based on the product name.</p> <p>The URL Key should be all lowercase characters, with hyphens instead of spaces. Do not include a suffix such as .html in the URL Key, because it is managed in the configuration.</p>
Meta Title	Store View	<p>The title appears in the title bar and tab of your browser, and is also used as the title on a search engine results page (SERP¹). The meta title should be unique to the page, and less than 70 characters in length.</p> <p>Auto-generated value: <code>{{name}}</code></p>
Meta Keywords	Store View	<p>Relevant keywords for the product. Consider using keywords that customers might use to find the product.</p> <p>Auto-generated value: <code>{{name}}</code></p>
Meta Description	Store View	<p>The meta description provides a brief overview of the page for search results listings. An ideal length is between 150-160 characters in length, with a maximum of 255 characters. Although not visible to the customer, some search engines include the meta description on the search results page.</p> <p>Auto-generated value: <code>{{name}}</code> <code>{{description}}</code></p>

¹Search Engine Results Page

Websites

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



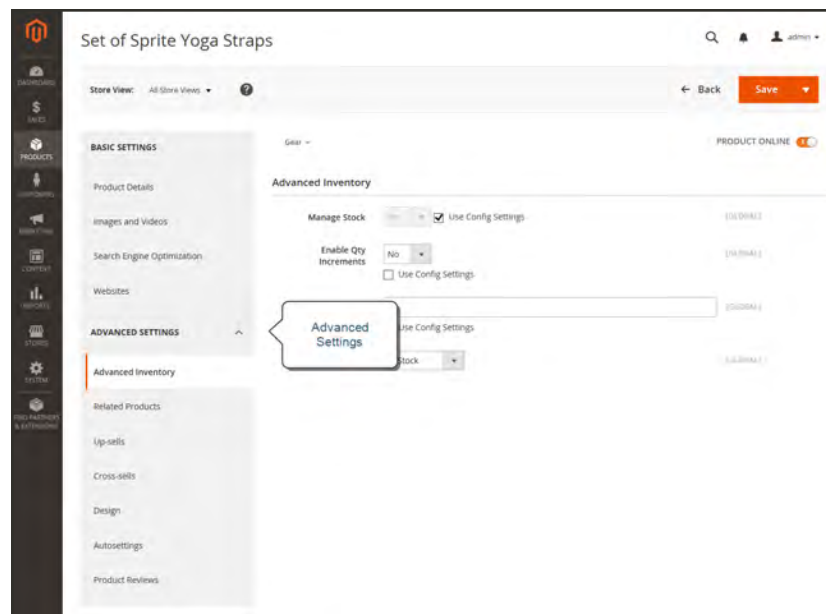
Websites

CHAPTER 13:

Advanced Settings

The Advanced Settings section includes tools that are used less frequently.

- [Advanced Pricing](#)
- [Advanced Inventory](#)
- [Custom Options](#)
- [Product Relationships](#)
- [Design](#)
- [Autosettings](#)
- [Product Reviews](#)



Advanced Settings

Advanced Pricing

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

Advanced Pricing

Group Price	Customer Group	Price	Action
			<input type="button" value="Add Group Price"/>

Special Price

Special Price From Date

Special Price To Date

Cost

Tier Price	Customer Group	Quantity	Item Price	Action
				<input type="button" value="Add Tier"/>

Advanced Pricing

Field Descriptions

FIELD	DESCRIPTION
Group Price	<p>Sets up promotional prices for specific customer groups within the selected website. Options include:</p> <p>Web Site Identifies the website where the group price rule applies. This option appears only if the installation has multiple websites.</p> <p>Customer Group (Required) Identifies the customer group that qualifies to receive the group price.</p> <p>Price (Required) Specifies the product price for members of the customer group, within the specific website.</p> <p>Actions Deletes the current Group Price rule.</p>
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Add Group Price</div>	Inserts an additional row for a new Group Price rule
Special Price	<p>Offers a discounted price during the time period defined by the From/To dates.</p> <p>In the storefront when a special price is available, the retail price is crossed out and the special price appears below in large, bold text.</p>
Special Price From Date	Sets the first date the Special Price is available. You can either enter the date or select it from the calendar.
Special Price To Date	Sets the last date the Special Price is available. You can either enter the date or select it from the calendar.
Cost	The actual cost of the item.
Tier Price	<p>Offers a quantity discount to members of a specific customer group and website. Options include:</p> <p>Web Site Identifies a specific website where the tier price rule applies.</p> <p>Customer Group Identifies a specific customer group that qualifies to receive the tier price discount.</p>

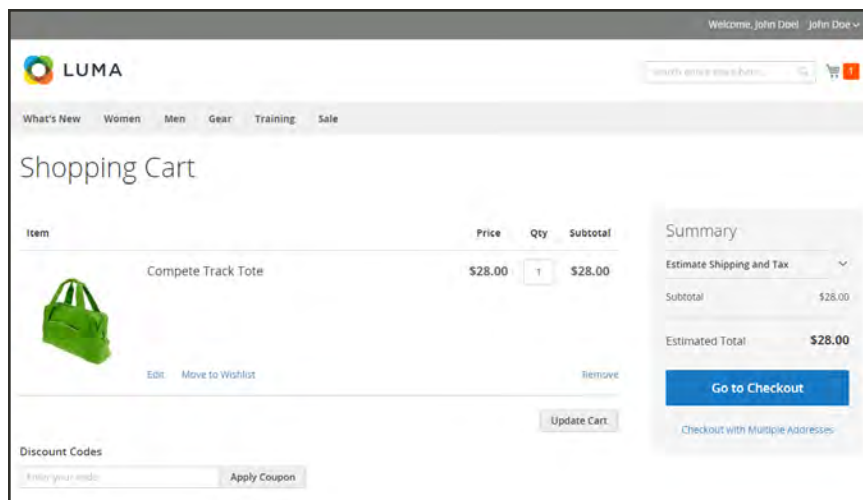
Field Descriptions (cont.)

FIELD	DESCRIPTION
Quantity	(Required) The quantity that must be purchased to receive the tier price.
Item Price	(Required) The discounted product price for the quantity purchased.
Actions	Deletes the current tier price rule.

Add Tier	Inserts an additional row for a new tier price rule definition.
----------	---

Group Price

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



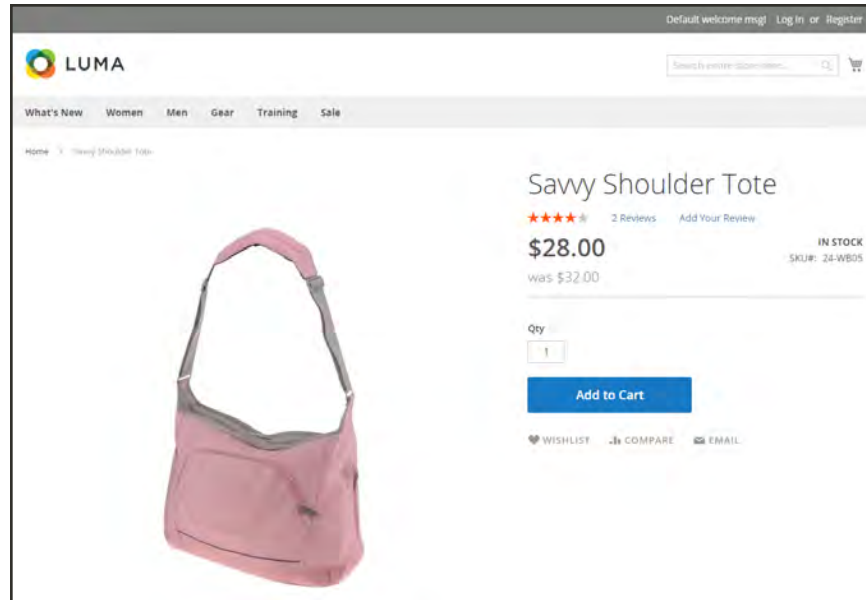
Group Price Applied in Shopping Cart

To set up a group price:

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


Special Price

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



Special Price

To apply a special price:

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

Special Price	<input type="text" value="\$ 28.00"/>
Special Price From Date	<input type="text" value="6/7/2015"/> 
Special Price To Date	<input type="text" value="6/13/2015"/> 

Special Pricing Settings

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

Tier Price

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

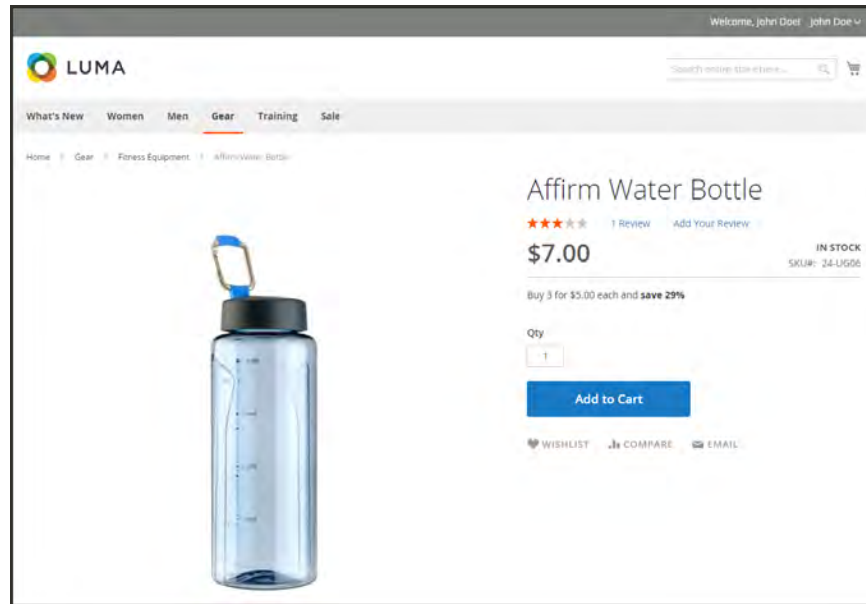


Tier Price “As Low as”

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

Buy 3 for \$5.00 each and save 29%

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.



Tier Price on Product Page

To set up a tier price:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**.
3. In the Tier Price section, tap **Add Tier**. Then, do the following:

Tier Price	Customer Group	Quantity	Item Price	Action
	Members	3 and above	\$5	Delete

Add Tier

Tier Pricing

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

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

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

Minimum Advertised Price

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

MAP Logic

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

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

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

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

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

Using MAP with Product Types

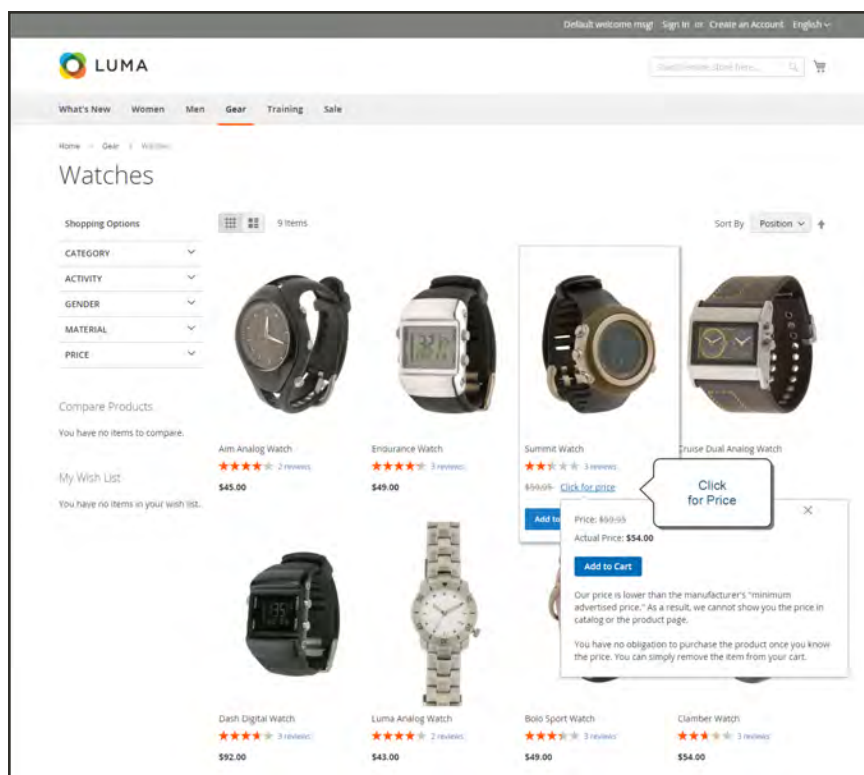
PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Custom option prices appear normally.
Grouped	The prices of associated simple products do not automatically appear on catalog list and product pages, but are included only according to the Display Actual Price setting.
Configurable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Option prices appear normally.
Bundle (with fixed price)	The actual price does not automatically appear on catalog pages, but is included only according to the Display Actual Price setting. The prices of bundle items appear normally. <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;">MAP is not available for bundle products with dynamic pricing.</div>
Downloadable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. The price associated with each download link appears normally.

Using MAP with Price Settings

PRICE SETTING	DESCRIPTION
Tier Price	If tier pricing is set, the tier pricing message is not displayed in the catalog. On the product page a notification is displayed that indicates that the price can be lower when ordering more than a certain quantity, but the discount is displayed in percentages only. For associated products of a grouped product, the discounts are not displayed on the product page. The tier price is shown according to the Display Actual Price setting.
Special Price	If the Special price is specified, the special price is displayed according to the Display Actual Price setting.

Configuring MAP

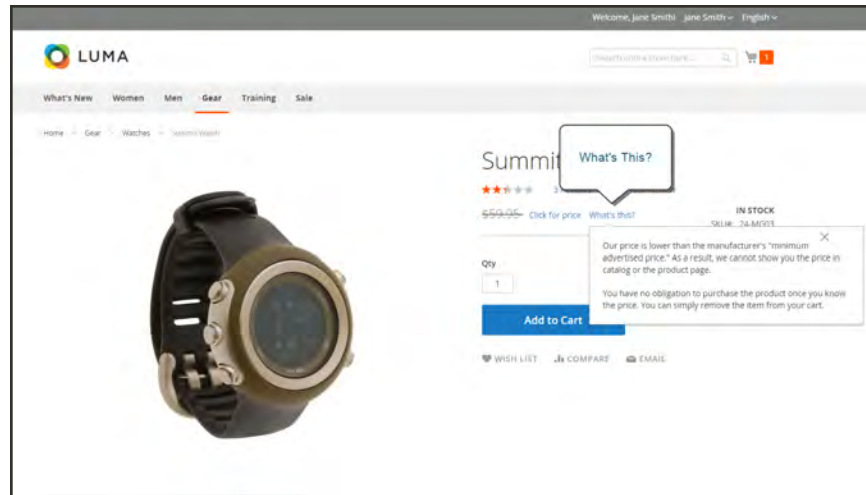
Your store’s MAP settings can be applied to all products in your catalog, or configured for only specific products. When Minimum Advertised Price is enabled globally, all product prices in the storefront are hidden from view. There are a variety of configuration options that you can use to remain in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



Actual Price Appears “On Gesture”

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

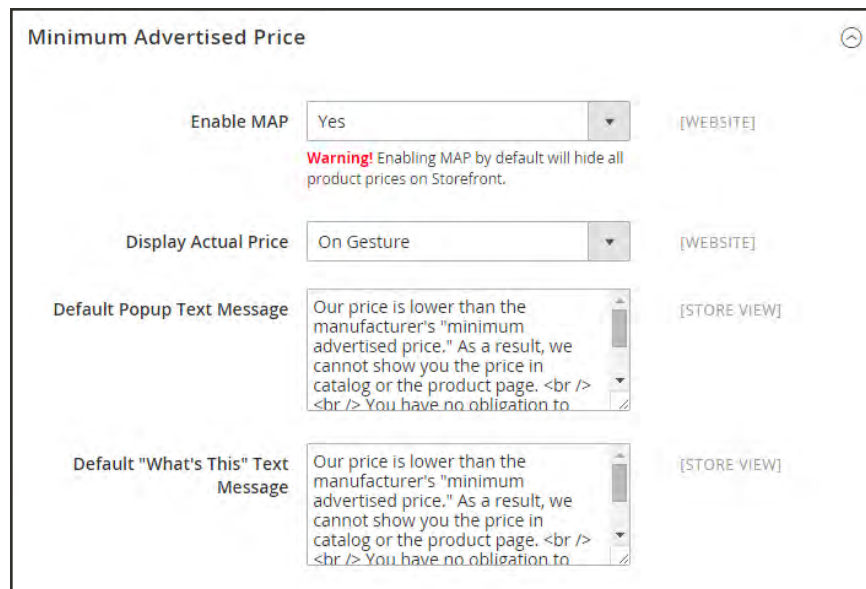
When MAP is enabled, the product-level MAP settings become available. You can apply MAP to an individual product by entering the MSRP, and choosing how you want the actual price to appear in the store. Product-level MAP settings override the global MAP settings.



What's This?

To configure MAP:

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



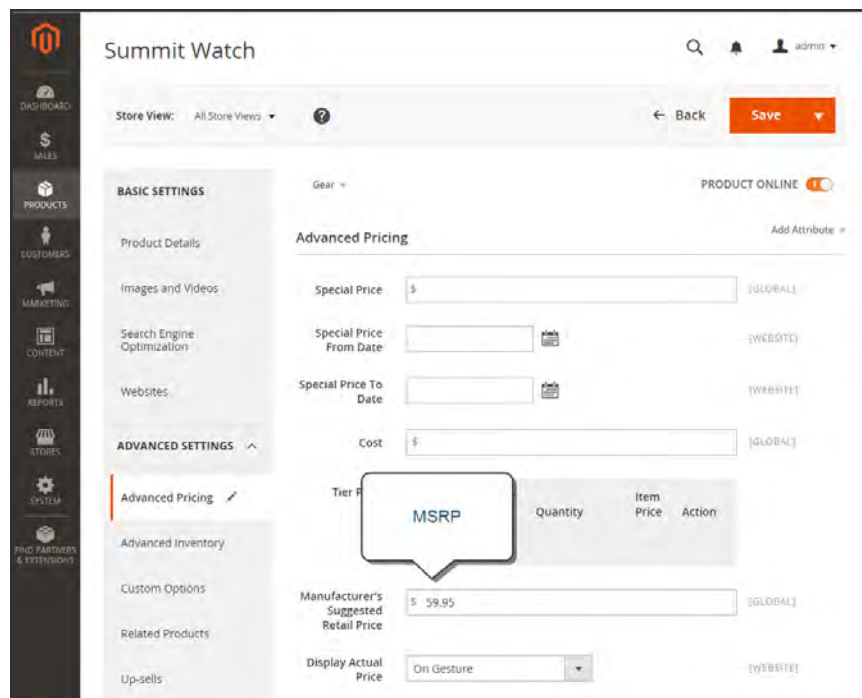
Minimum Advertised Price

Method 1: Configure MAP for All Products:

1. To determine when and where you want the actual price to be visible to customers, set **Display Actual Price** to one of the following:
 - In Cart
 - Before Order Confirmation
 - On Gesture (on click)
2. Enter the text that you want to appear for the **Default Popup Text Message**.
3. Enter any additional explanation in the **Default “What’s This” Text Message** field.
4. When complete, tap **Save Config**.

Method 2: Configure MAP for a Single Product

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Open the product in **Edit** mode.
3. In the panel on the left under **Advanced Settings**, choose **Advanced Pricing**. Then, do the following:



Manufacturer’s Suggested Retail Price

- a. Enter the **Manufacturer's Suggested Retail Price**.

In this example, the product price is \$54.00, and the MSRP is 59.95.

- b. Set **Display Actual Price** to one of the following:

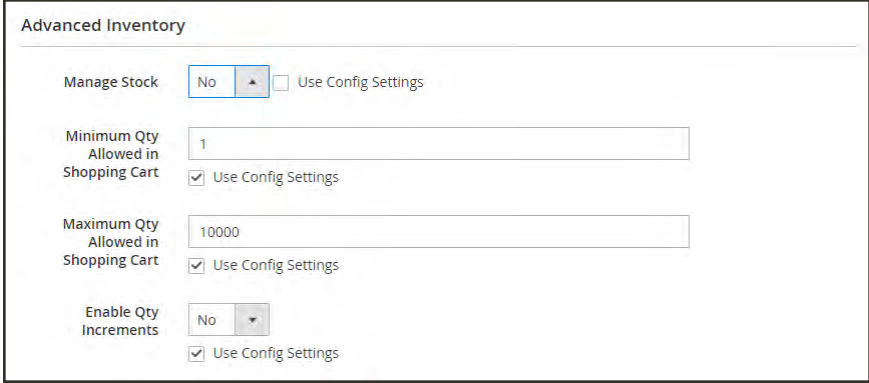
Use config	(Default) Applies the MAP configuration setting.
On Gesture	Displays the actual product price in a popup when the customer clicks the "Click for price" or "What's this?" link.
In Cart	Displays the actual product price in the shopping cart.
Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.

The Manufacturer's Suggested Retail Price and Display Actual Price fields appear only when Minimum Advertised Price is enabled in the configuration.

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

Advanced Inventory

Each product in your catalog has both a short and long version of the Advanced Inventory options, depending on whether you want to manage stock for the product. The long form appears when Manage Stock is set to “Yes.” The initial values reflect the default **Product Stock Options** set in the configuration.



The screenshot shows the 'Advanced Inventory' configuration panel. It contains the following fields and options:

- Manage Stock:** A dropdown menu set to 'No' and a checkbox for 'Use Config Settings' which is unchecked.
- Minimum Qty Allowed in Shopping Cart:** A text input field containing the value '1' and a checked checkbox for 'Use Config Settings'.
- Maximum Qty Allowed in Shopping Cart:** A text input field containing the value '10000' and a checked checkbox for 'Use Config Settings'.
- Enable Qty Increments:** A dropdown menu set to 'No' and a checked checkbox for 'Use Config Settings'.

Advanced Inventory (Short Form)

Method 1: Without Stock Management

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

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Manage Stock	Global	Determines if inventory control is used to manage this product in your catalog. Options: Yes / No
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Enable Qty Increments	Global	Determines if the product can be sold in quantity increments. Options: Yes / No
Qty Increments	Global	<p>Enter the number of products that must be purchased at the same time. For example, if set to 6, the customer must purchase a quantity of 6, 12, 18, and so on.</p> <p>When a product is sold in quantity increments, the number appears in the upper-right corner, next to the shopping cart link. If the customer tries to purchase the product in any other quantity, a message appears in the shopping cart,</p>

Method 2: With Stock Management

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

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

Advanced Inventory

Manage Stock Yes Use Config Settings

Qty

Qty for Item's Status to Become Out of Stock Use Config Settings

Minimum Qty Allowed in Shopping Cart Use Config Settings

Maximum Qty Allowed in Shopping Cart Use Config Settings

Qty Uses Decimals No

Can be Divided into Multiple Boxes for Shipping No

Backorders No Backorders Use Config Settings

Notify for Quantity Below Use Config Settings

Enable Qty Increments No Use Config Settings

Stock Availability In Stock

Advanced Inventory (Long Form)

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Manage Stock	Global	Determines if inventory control is used to manage this product in your catalog. Options:
		Yes Displays the long form with all stock management options.
		No Display the short form without stock management options.
Qty	Global	The quantity of the item that is currently in stock.
Qty for Item's Status to Become Out of Stock	Global	Determines the stock level at which a product is considered to be out of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum number of the product that can be purchased in a single order.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of the product that can be purchased in a single order.
Qty Uses Decimals	Global	Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options:
		Yes Permits values to be entered as decimals, rather than whole numbers, which is suitable for products sold by weight, volume or length.
		No Requires quantity values to be entered as whole numbers.
Can be Divided into Multiple Boxes for Shipping	Global	Determines if parts of the product can be shipped separately. Options: Yes / No

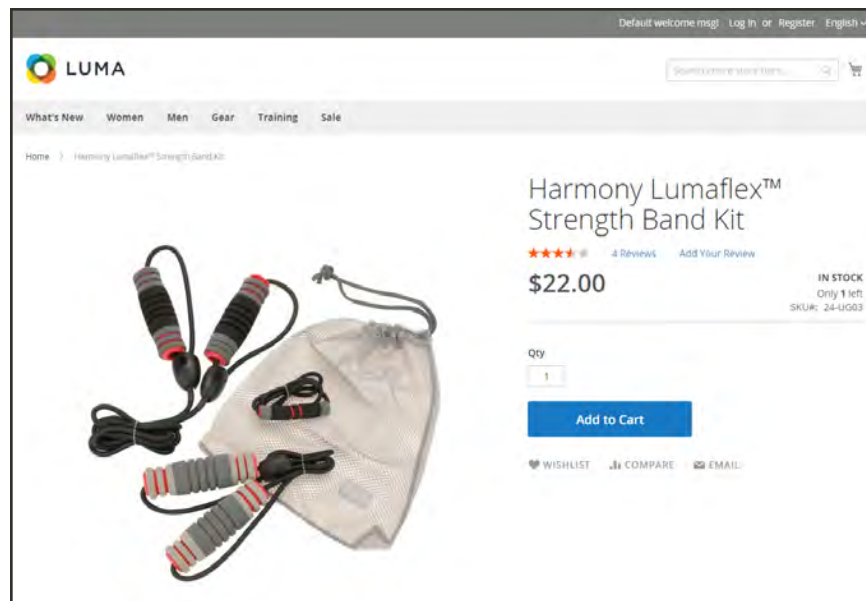
Field Descriptions (cont.)

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

Stock Options

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

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



In Stock, Only 1 Left

To configure stock options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Inventory**.
3. Expand ☯ the **Stock Options** section, and do the following:
 - a. To return items to stock if an order is canceled, **Set Items' Status to be in Stock When Order in Canceled** to “Yes.”
 - b. To adjust the quantity on hand when an order is placed, set **Decrease Stock When Order is Placed** to “Yes.”
 - c. Set **Display Out of Stock Products** to “Yes” to continue to display products in the catalog that are no longer in stock.

If **price alerts** are enabled, customers can sign up to be notified when the product is back in stock.

- d. To display the message, “Only x left,” enter the number in the **Display X left Threshold** field.

The message begins to appear when the quantity in stock reaches the threshold. For example, if set to 3, the message “Only 3 left” appears when the quantity in stock reaches 3. The message adjusts to reflect the quantity in stock, until the quantity reaches zero.

- e. To display an “In Stock” or “Out of Stock” message on the product page, set **Display Products Availability In Stock on Storefront** to “Yes.”

Stock Options		☯
Set Items' Status to be In Stock When Order is Cancelled	Yes	[GLOBAL]
Decrease Stock When Order is Placed	Yes	[GLOBAL]
Display Out of Stock Products	No	[GLOBAL]
Products will still be shown by direct product URLs.		
Only X left Threshold	0	[WEBSITE]
Display products availability in stock on Storefront.	Yes	[STORE VIEW]


Stock Options

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

Product Stock Options




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

To configure the default inventory settings:

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

Product Stock Options ⊖

Please note that these settings apply to individual items in the cart, not to the entire cart.

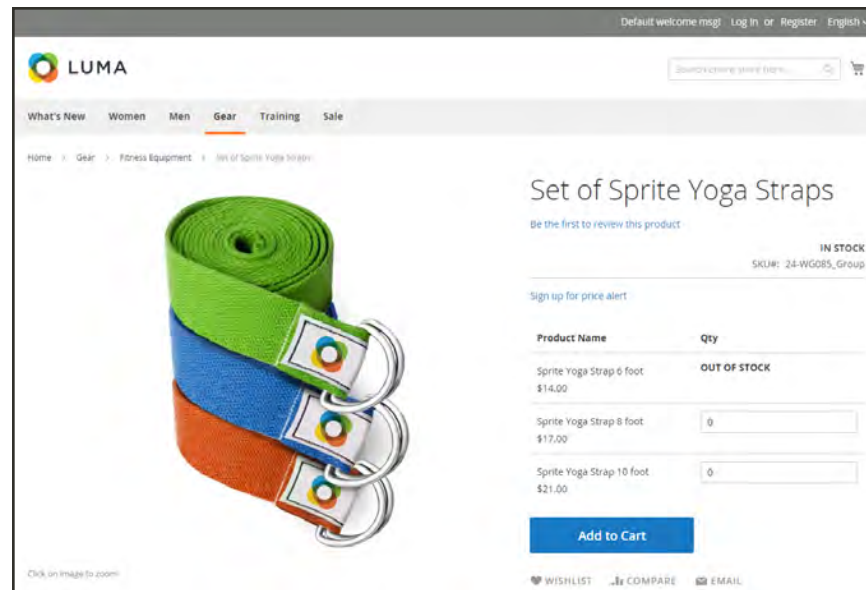
Manage Stock	Yes <input type="text"/>	[GLOBAL]									
	<small>Changing can take some time due to processing whole catalog.</small>										
Backorders	No Backorders <input type="text"/>	[GLOBAL]									
	<small>Changing can take some time due to processing whole catalog.</small>										
Maximum Qty Allowed in Shopping Cart	10000 <input type="text"/>	[GLOBAL]									
Out-of-Stock Threshold	0 <input type="text"/>	[GLOBAL]									
Minimum Qty Allowed in Shopping Cart	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Customer Group</th> <th style="width: 30%;">Minimum Qty</th> <th style="width: 40%;">Action</th> </tr> </thead> <tbody> <tr> <td>ALL GR <input type="text"/></td> <td>1 <input type="text"/></td> <td style="text-align: center;"></td> </tr> <tr> <td colspan="3" style="text-align: center;"><input type="button" value="Add"/></td> </tr> </tbody> </table>	Customer Group	Minimum Qty	Action	ALL GR <input type="text"/>	1 <input type="text"/>		<input type="button" value="Add"/>			[GLOBAL]
Customer Group	Minimum Qty	Action									
ALL GR <input type="text"/>	1 <input type="text"/>										
<input type="button" value="Add"/>											
Notify for Quantity Below	1 <input type="text"/>	[GLOBAL]									
Enable Qty Increments	No <input type="text"/>	[GLOBAL]									
Automatically Return Credit Memo Item to Stock	No <input type="text"/>	[GLOBAL]									

Product Stock Options

- b. Set **Backorders** to one of the following:
 - No Backorders To not accept backorders when product is out of stock.
 - Allow Qty Below 0 To accept backorders when the quantity falls below zero.
 - Allow Qty Below 0 and Notify Customer To accept backorders when the quantity falls below zero, and notify the customer that the order can still be placed.
 - c. Enter the **Maximum Qty Allowed in Shopping Cart**.
 - d. Enter the **Qty for Item's Status to Become Out of Stock**.
 - e. Enter the **Minimum Qty Allowed in Shopping Cart**.
 - f. In the **Notify for Quantity Below** field, enter the stock level that triggers notification that the item is out of stock.
 - g. To activate quantity increments for the product, set **Enable Qty Increments** to “Yes.” Then in the **Qty Increments** field, enter the number of the items that must be purchased to meet the requirement. For example, an item that is sold in increments of 6 can be purchased in quantities of 6, 12, 18, and so on.
 - h. When a credit memo is issued for the item, set **Automatically Return Credit Memo Item to Stock** to “Yes” if you want to return the item to inventory by default.
4. When complete, tap **Save Config**.

Stock Message Scenarios

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



Grouped Product with “Out of Stock” Message

Product Page Stock Messages

There are several variations of messaging available for the product page, depending on the combination of Manage Stock and Stock Availability settings.

Example 1: Show Availability Message

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

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

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

STOCK OPTIONS		MESSAGE	
Display product availability in stock in the frontend:	Yes		
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.

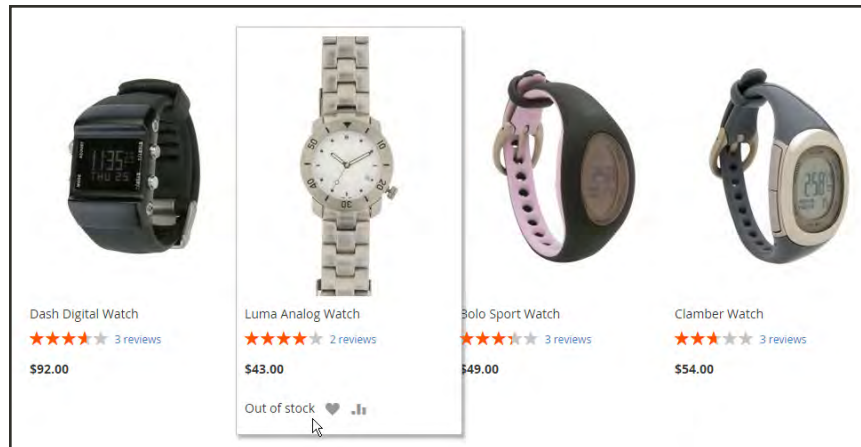
STOCK OPTIONS		MESSAGE	
Display product availability in stock in the frontend:	No		
Product Inventory			
Manage Stock	Yes		
Stock Availability	In Stock		None
	Out of Stock		None

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	

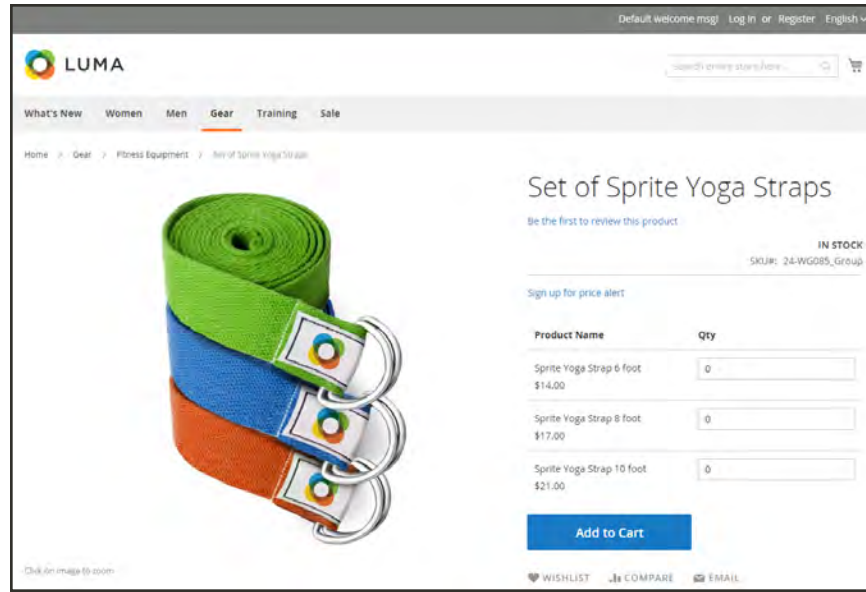
Example 3: Hide Product Until Back in Stock

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		
Allow Alert When Product Price Changes	No	[STORE VIEW]
Price Alert Email Template	Price Alert (Default)	[STORE VIEW]
Allow Alert When Product Comes Back in Stock	No	[WEBSITE]
Stock Alert Email Template	Stock Alert (Default)	[STORE VIEW]
Alert Email Sender	General Contact	[STORE VIEW]

Product Alerts

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

Product Alert Run Settings

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

▼ Product Alerts Run Settings

Frequency: Daily [GLOBAL]

Start Time: 00 : 00 : 00 [GLOBAL]

Error Email Recipient: [GLOBAL]

Error Email Sender: General Contact [GLOBAL]

Error Email Template: Cron Error Warning (Default) [GLOBAL]

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**.

Custom Options

Adding custom options to a product is an easy way to offer customers a selection of options with a variety of text, selection, and date input types. Custom options are a good solution if your inventory needs are simple. However, because custom options are variations of a single SKU, they cannot be used to manage stock. If you have multiple products with the same options, you can set the custom options in one product, and then import the options to other products.


The screenshot shows the 'Custom Options' configuration panel in a product edit mode. At the top right, there is a 'PRODUCT ONLINE' toggle switch. Below it, the 'Custom Options' section is visible. A 'New Option' form is displayed, featuring an 'Option Title' text input field, an 'Input Type' dropdown menu (currently showing '-- Please select -'), and a 'Required' checkbox. At the bottom of the form, there are two buttons: 'Import Options' and 'Add New Option'.

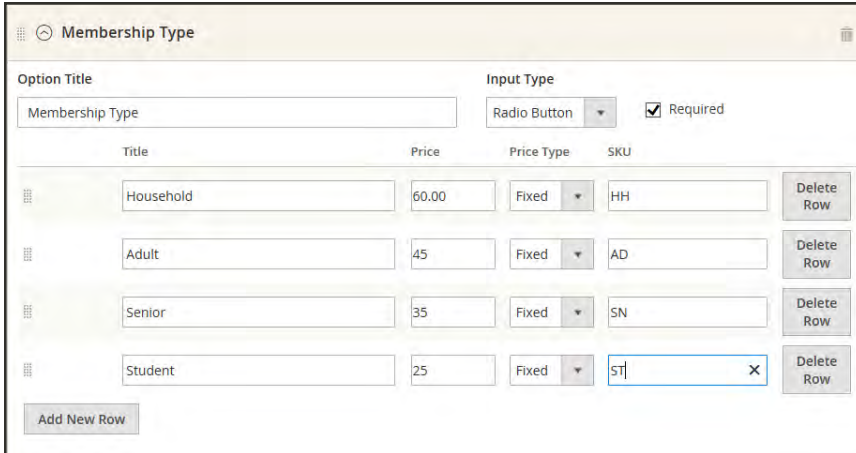
Custom Options

To create custom options:

1. Open the product in edit mode.
2. In the panel on the left under **Advanced Settings**, choose **Custom Options**.
3. Tap **Add New Options**. Then, do the following:
 - a. In the **Option Title** field, enter a name for the option.
 - b. Set the **Input Type** for data entry.
 - c. If the option is not required to purchase the product, clear the **Required** checkbox.
4. Tap **Add New Row**. Then, complete the following:
 - a. In the **Title** field, enter a name for this option.
 - b. In the **Price** field, enter any markup or markdown from the base product price that applies to this option.
 - c. Set **Price Type** to one of the following:

Fixed	The price of the variation differs from the price of the base product by a fixed monetary amount, such as \$1.
Percentage	The price of the variation differs from the price of the base product by a percentage, such as 10%.

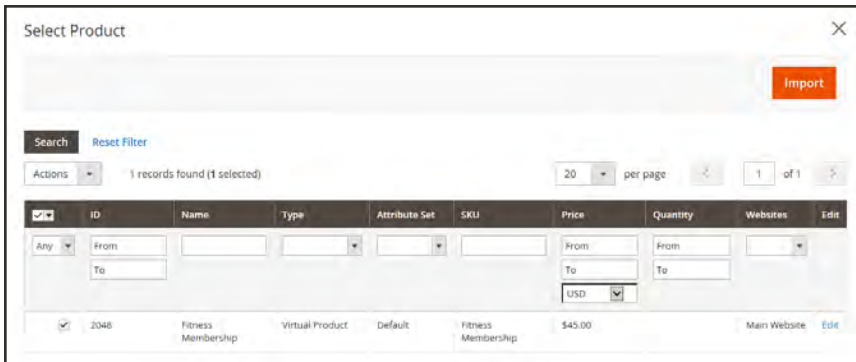
- d. Enter a **SKU** for the option. The option SKU is a suffix that is added to the product SKU.
 - e. To change the order of the options, tap the **Sort Order** icon , and drag the option to a new position in the list.
 - f. Repeat this step for each option to be added.
5. When complete, tap **Save**.



Change Order of Options

To import custom options:

- 1. In the **Custom Options** section, tap **Import Options**.
- 2. In the list, mark the checkbox of the product with the options that you want to import.
- 3. Tap **Import**.
- 4. When complete, you can add more custom options, or tap **Save and Close**.



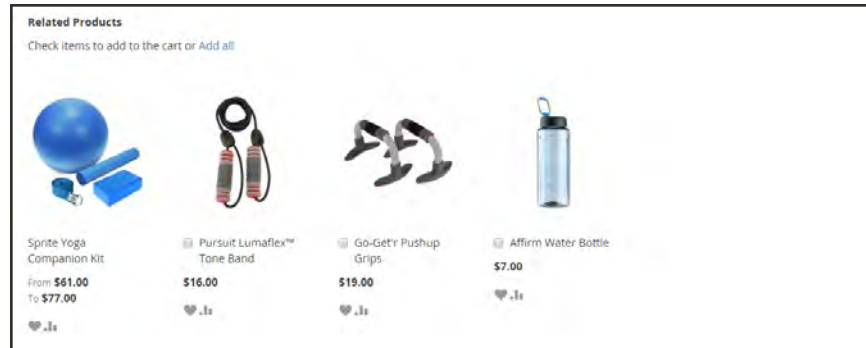
Importing Custom Options

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

Related Products

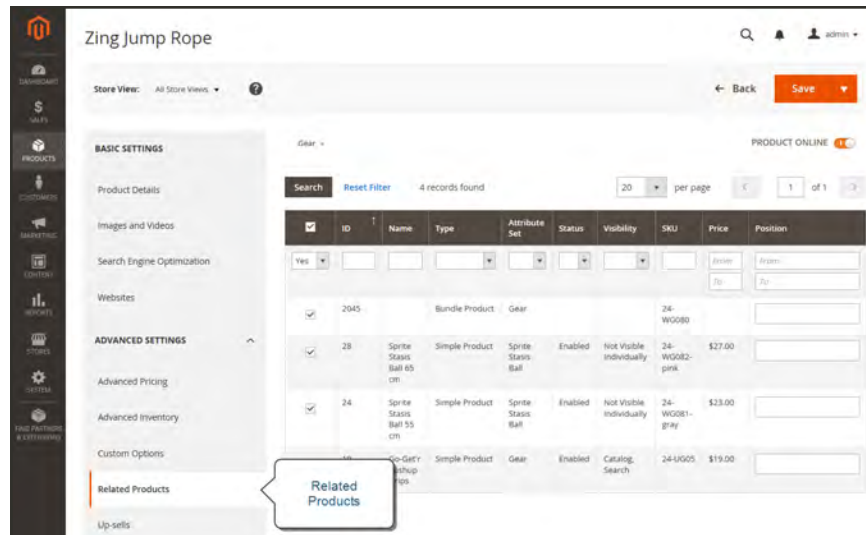
Related products are meant to be purchased in addition to the item the customer is viewing. The customer can place the item in the shopping cart by simply clicking the checkbox. The placement of the Related Products block varies according to theme and page layout. In the example below, it appears at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



Related Products

To set up related products:

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

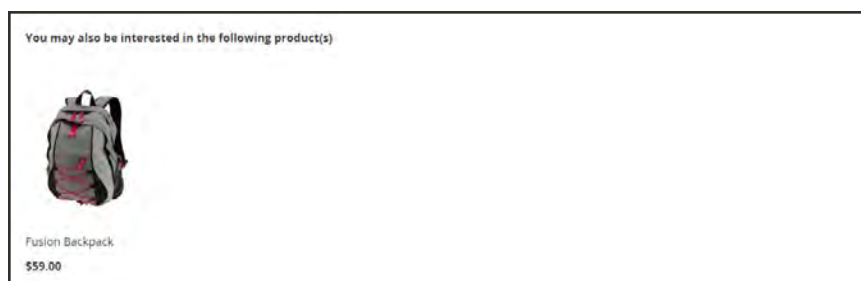


Related Products

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

Up-sells

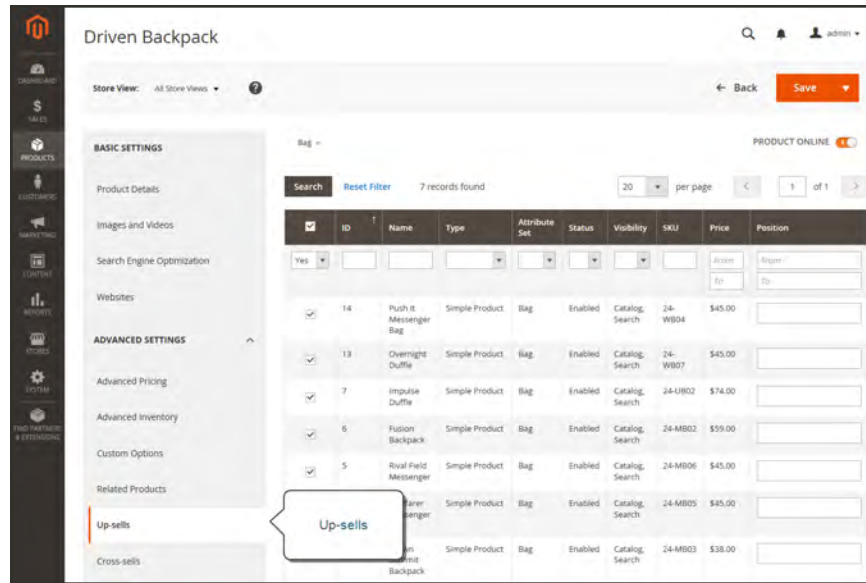
Up-sell products are items that your customer might prefer instead of the product currently considered. An item offered as an up-sell might be of a higher quality, more popular, or have better profit margin. Up-sell products appear on the product page under a heading such as, “You may also be interested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



Upsell

To select up-sell products:

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



Upsell Product

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

Cross-sells

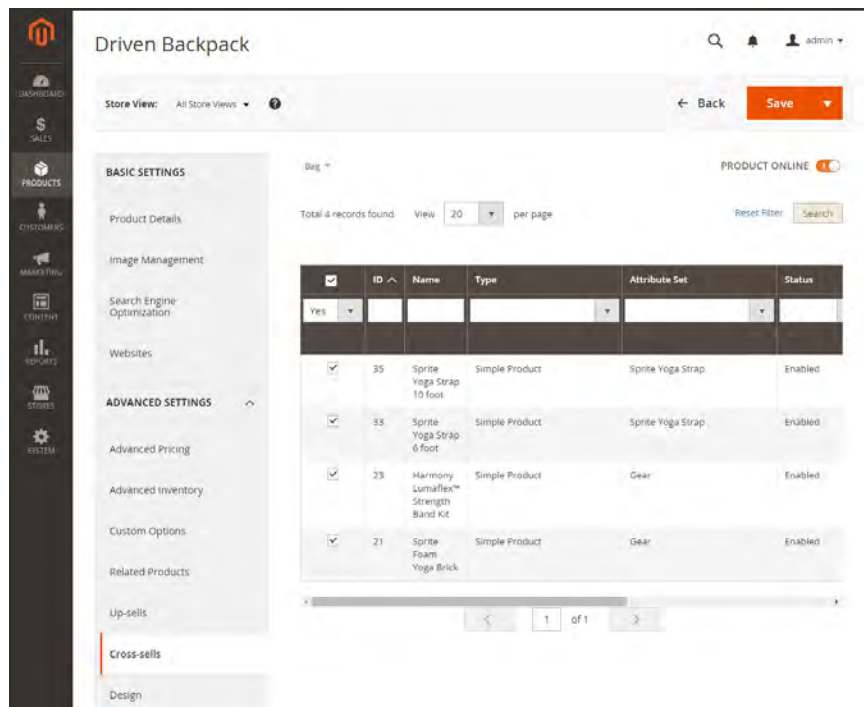
Cross-sell items are similar to impulse purchases positioned next to the cash register in the checkout line. Products offered as a cross-sell appear on the shopping cart page, just before the customer begins the checkout process.



Cross-sells in Shopping Cart

To set up cross-sell products:

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



Cross-sell Products

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

Design

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

Design

Field Descriptions

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

Field Descriptions (cont.)

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

Autosettings

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

Autosettings

Field Descriptions

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

Field Descriptions (cont.)

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

Product Reviews

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

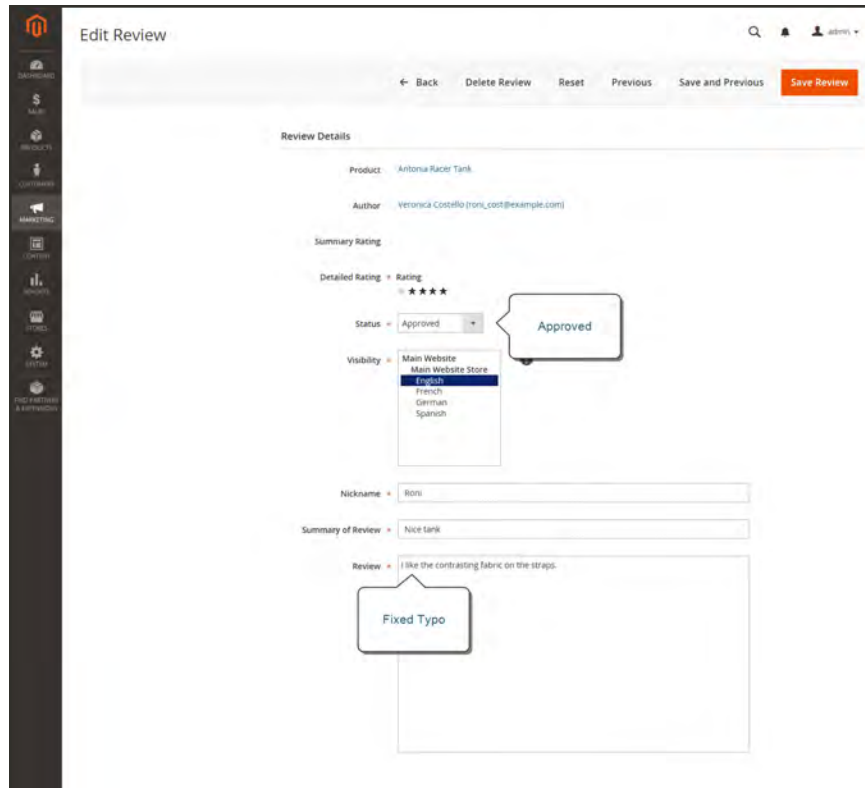
The screenshot shows the 'Product Reviews' page for the product 'Antonia Racer Tank'. The interface includes a sidebar with navigation options like 'Product Details', 'Images and Videos', and 'Advanced Settings'. The main content area shows a table of reviews with the following data:

ID	Created	Status	Title	Nickname	Review	Visibility	Type	Product	SKU	Action
347	Dec 7, 2015, 2:11:28 PM	Pending	Ice tank	Roni	I love the contrasting fabric on the straps.	Main Website Store English	Customer	Antonia Racer Tank	WT08	edit
337	Dec 4, 2015, 11:48:01 AM	Approved	Zero support/modesty	Shaunter	I would never wear this tank to anything but a l...	Main Website Store English	Guest	Antonia Racer Tank	WT08	edit
338	Dec 4, 2015, 11:48:01 AM	Approved	Not for high impact	Merrie	Definitely not good for anything high impact, b...	Main Website Store English	Guest	Antonia Racer Tank	WT08	edit
339	Dec 4, 2015, 11:48:01 AM	Approved	A regular or me	Pearl	This is in regular rotation at the gym. Its col...	Main Website Store English	Guest	Antonia Racer Tank	WT08	edit

Product Reviews

To moderate a review:

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



Approving a Review

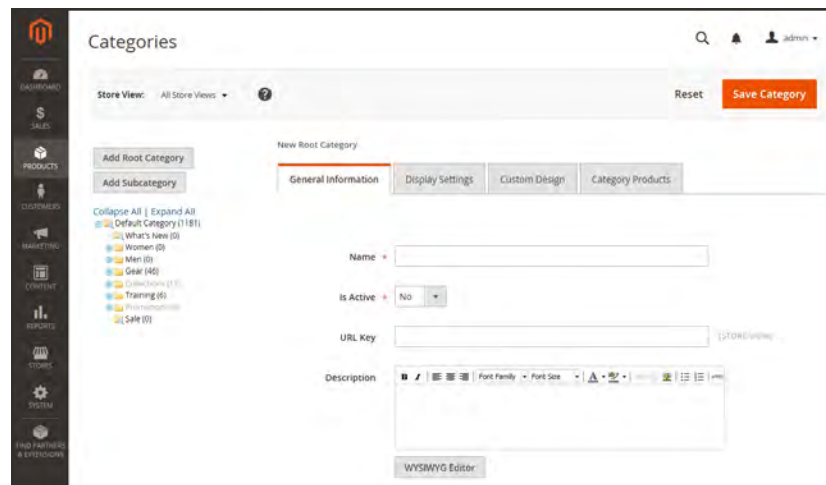
6. When complete, tap **Save Review**.

CHAPTER 14:

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 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. Below that, you can have as many additional subcategories as you need.



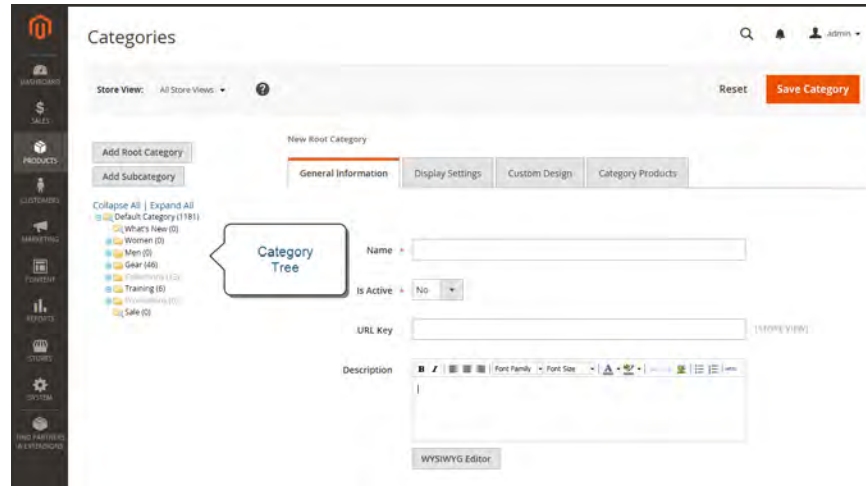
Category Tree

Controls

FIELD	DESCRIPTION
<input type="button" value="Add Root Category"/>	Creates a new root category.
<input type="button" value="Add Subcategory"/>	Adds a subcategory below the current category or subcategory.
<input type="button" value="Collapse All / Expand All"/>	Either collapses or expands the category tree.
<input type="button" value="Delete Category"/>	Removes the current category or subcategory from the tree.
<input type="button" value="Reset"/>	Removes unsaved changes, and restores the previous settings.
<input type="button" value="Save Category"/>	Saves any changes made to the category.

Creating Categories

The category structure of your catalog is represented as an upside-down tree, with the root at the top. Each section of the tree can be expanded and collapsed. Any disabled or hidden categories are grayed out. Categories can be dragged and dropped to other locations in the tree, and each category has an ID number in parentheses after the category name at the top of the page.



Category Tree

Process Overview:

- Step 1: **Create a Category**
- Step 2: **Complete the General Information**
- Step 3: **Complete the Display Settings**

Step 1: Create a Category

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree, tap the parent category of the new category. The parent is one level above the new category.

If you're starting from the beginning without any data, there might be only two categories in the list: "Default Category," which is the root, and an "Example Category."

3. Tap **Add Subcategory**.

Step 2: Complete the General Information

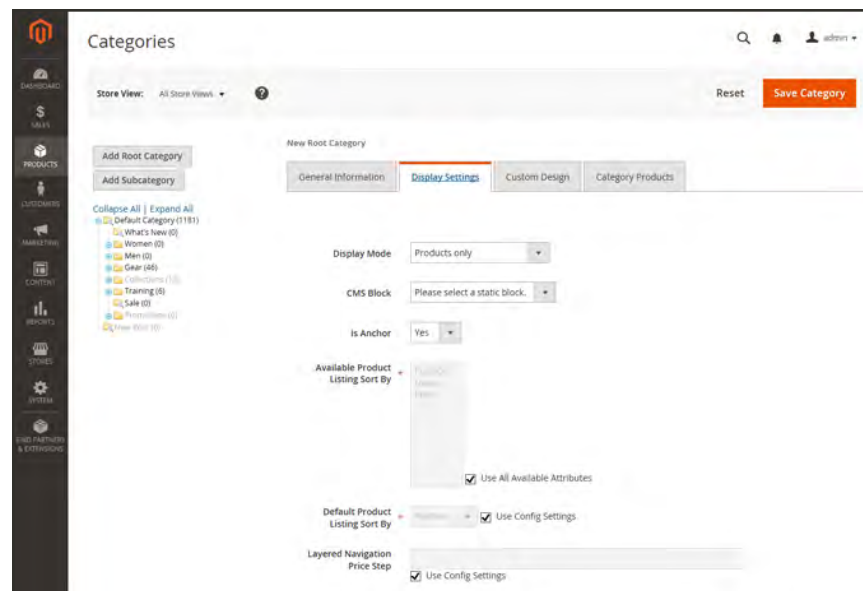
1. On the **General Information** tab, do the following:
 - a. (Required) Enter the **Name** of the category.
 - b. (Required) To enable the category, set **Is Active** to “Yes.”
 - c. You can enter a **URL Key** for the category, or let the system automatically create one that is based on the category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

Step 3: Complete the Display Settings

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

1. On the **Display Settings** tab, set **Display Mode** to one of the following:
 - Products Only
 - Static Block Only
 - Static Block and Products
2. If applicable, set **CMS Block** to the static block that you want to appear on the category page.
3. If you want this category page to display the “Filter by Attribute” section of layered navigation, set **Is Anchor** to “Yes.”

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



Display Settings

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

Modifying Categories

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

To move a category:

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

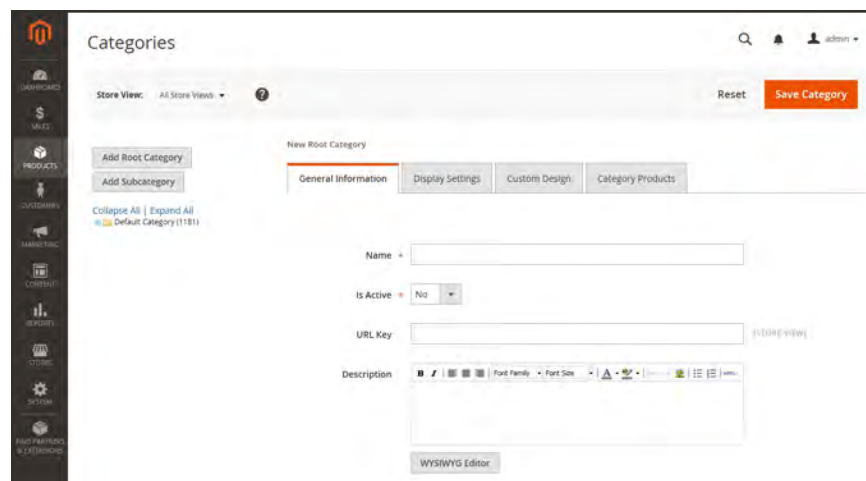
3. In the category tree, select the category that you want to delete.

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**.

Root Categories

The category structure is like an upside-down tree, with the root on top. All categories in your catalog are nested below the root. Because the root category is the highest level of the catalog, your store can have only one root category active at a time. You can, however, create additional root categories for alternate catalog structures, different stores, and views. Cart **price rule conditions** can be based on any category that is a child of the store's root. The root category is not visible to customers in the store, and does not have a URL key.



New Root Category

Process Overview:

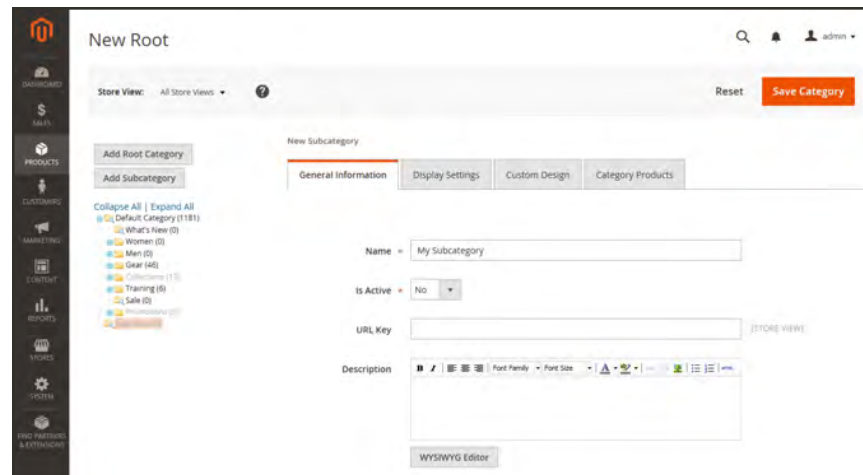
- Step 1: **Create a New Root Category**
- Step 2: **Add Subcategories to the New Root**
- Step 3: **Apply the New Root Category to Your Store**

Step 1: Create a New Root Category

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

Step 2: Add Subcategories to the New Root

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



New Root with Subcategory

Step 3: Apply the New Root Category to Your Store

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

Hidden Categories

There are many ways to use hidden categories. You might want to create additional category levels for your own internal purposes, but show only the higher-level categories to your customers. Or, you might want to link to a category that is not included in the navigation menu.

To create hidden categories:

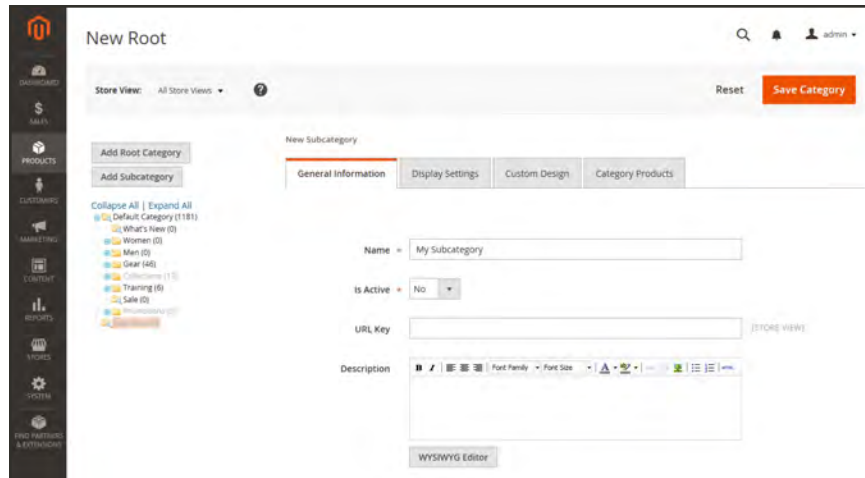
1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Categories**.
2. In the category tree, select the category you want to hide.
3. On the **General Information** tab, do the following:
 - a. Set **Is Active** to “No.”
 - b. Set **Include in Navigation Menu** to “No.”
4. On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

As active categories, you can now link to them from other places in your store, but they will not appear in the navigation menu.

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

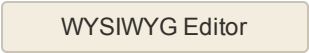
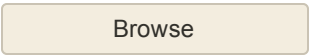
General Information

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



General Information

Field Descriptions

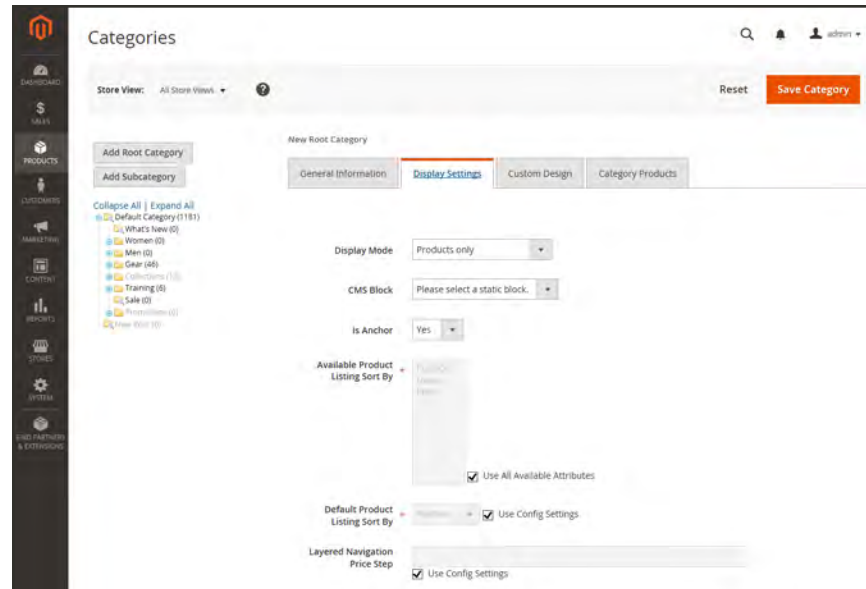
FIELD	DESCRIPTION
Name	(Required) The category name appears in the navigation, and also in the URL key of the category page and associated product pages.
Is Active	(Required) To make this category available, select “Yes.” Options: Yes / No
URL Key	The URL Key is a relative path to the category, and is automatically generated when the category is saved. The URL Key must be all lower-case characters, with no spaces. As a best practice, each word is separated by a hyphen. If you edit the default URL key, a custom redirect is created automatically. A root category does not have a URL key.
Description	The category description, if used, appears below the category image and before the product list.
Image	If supported by your theme, a thumbnail image can be associated with each category and appear as part of the option in the main menu of the store.
	Opens the editor.
Image	The category image, if used, appears at the top of the category page, before the description and product list. As an alternative, you can display a CMS static block in place of the description and image. (See Category Display Settings.)
	Locates the image file to be uploaded from the directory of your system.
Page Title	The category page title appears in the browser tab and title bar. As a best practice, the title should be not more than twelve words in length, and should include a combination of primary and secondary keywords.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Meta Keywords	Keywords are used by some search engines, and not by others. You can use a keyword search tool to identify high value keywords that relate to your category. A general rule is to use no more than thirty keywords, or 180 characters. Avoid repeats, and empty words such as “a,” “an,” “or” and “that.”
Meta Description	Enter a description of the category, using approximately twenty-five words or 150 characters.
Include in Navigation Menu	(Required) Determines if the category is included in the main menu. Options: Yes Include this category in the top navigation, select “Yes.” No Hides the category, although it is active. Hidden categories do not appear in the top navigation, but are included in layered navigation.

Display Settings

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



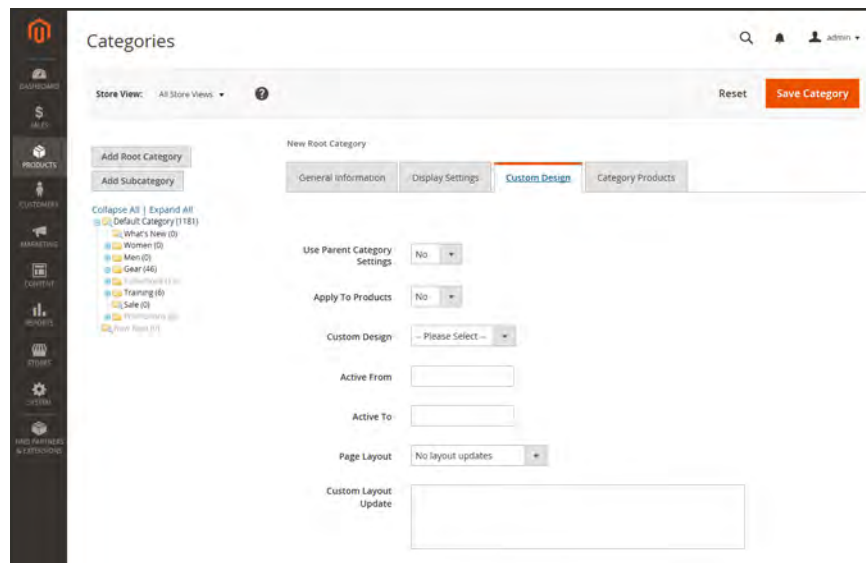
Display Settings

Field Descriptions

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

Custom Design

The Custom Design tab gives you control over the look and feel of a category and all assigned product pages, and page layout. You can customize a category page its assigned products for a promotion or to differentiate the category. For example, you might develop distinctive design for a brand or special line of products.



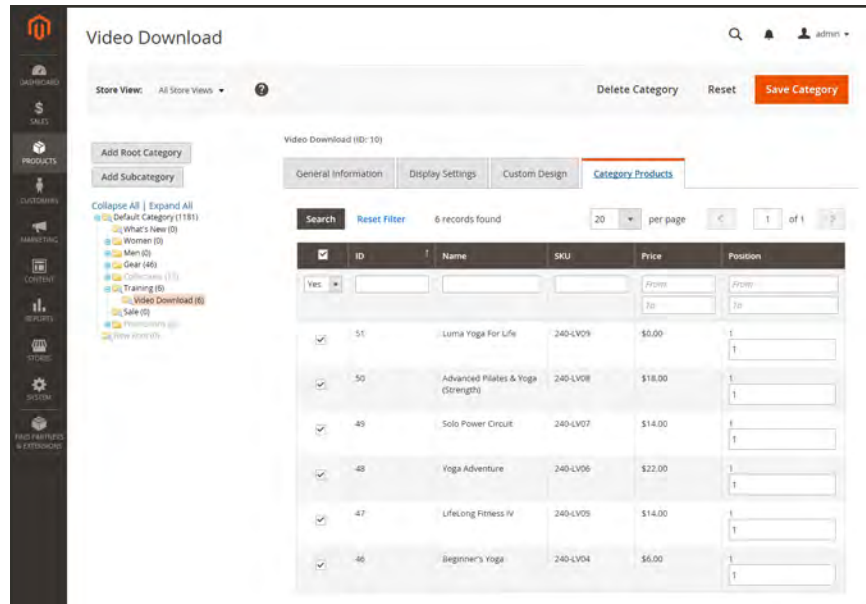
Custom Design

Field Descriptions

FIELD	DESCRIPTION
Use Parent Category Settings	Allows the current category to inherit the design settings from the parent category. Options: Yes / No
Apply to Products	Applies the custom settings to all products in the category. Options: Yes / No
Custom Theme	Applies a custom theme to the category.
Active From	The beginning of a date range that specifies the first day the theme is to be used in the store. The date can be entered or selected from the calendar.
Active To	The end of a date range that specifies the last day the theme is to be used in the store. The date can be entered or selected from the calendar
Page Layout	Applies a different layout to the category page. Options: <ul style="list-style-type: none"> No layout updates Pre-selected by default, and does not apply layout changes to the category page. Empty Use to define your own page layout. (Requires an understanding of XML.) 1 column Applies a one-column layout to the category page. 2 columns with left bar Applies a two-column layout with a left sidebar to the category page. 2 columns with right bar Applies a two-column layout with a right sidebar to the category page. 3 columns Applies a three-column layout to the category page.
Custom Layout Update	Updates the theme layout with custom XML code.

Category Products

The Category Products tab lists the products that are currently assigned to the category. The search filters at the top of each column are used to add and remove products from the category.



Category Products

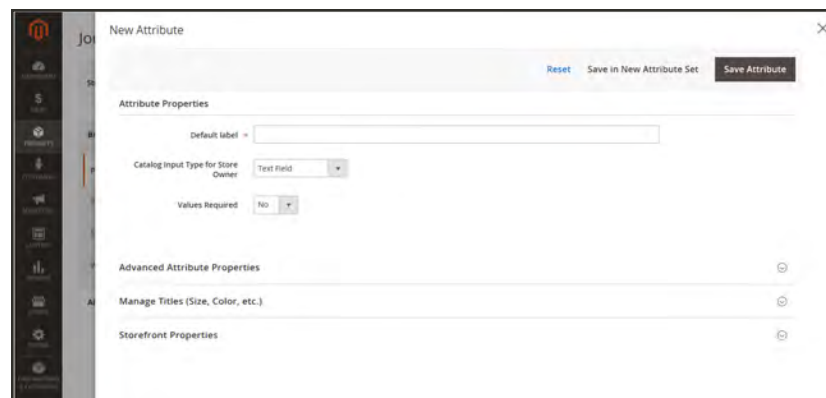
Controls

FIELD	DESCRIPTION
Selection	<p>The checkbox in the header of the first column can be used to select or deselect all products.</p> <p>The control in the first row determines the type of search, and can be set to include any record, or only those that are either assigned or not assigned to the category. The checkbox in the first column of each row identifies products to be added to the category. Options: Yes / No / Any</p>
Search Filters	<p>The filter controls at the top of each column can be used to enter specific values you want to either include or omit from the list, depending on the Select All setting.</p>
Reset Filter	<p>Clears all search filters.</p>
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block; background-color: #f9f9f9;">Search</div>	<p>Searches the catalog based on the filter criteria, and displays the result.</p>

CHAPTER 15:

Using Product Attributes

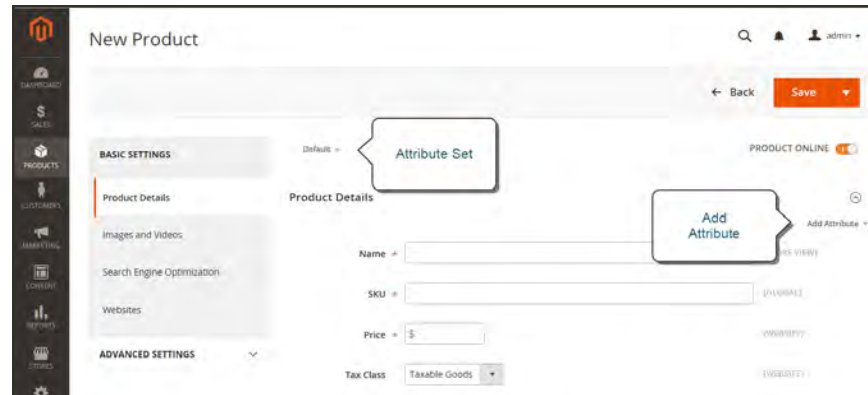
Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Attributes determine the type of input control that is used for product options, provide additional information for product pages, and are used as search parameters and criteria for layered navigation, product comparison reports, and promotions. You can create as many attributes as you need to describe the products in your catalog. Other attributes such as price, are built into the core Magento platform and are referred to as “system attributes.”



Creating a New Attribute from an Open Product

Adding an Attribute

Although attributes are managed from the Stores menu, you can add new attributes “on the fly” while working on a product. You can choose from the list of existing attributes, or create a new attribute. The new attribute is added to the attribute set used by the product.



Process Overview:

- Step 1: [Add a New Attribute](#)
- Step 2: [Describe the Basic Properties](#)
- Step 3: [Describe the Advanced Properties](#)
- Step 4: [Enter the Field Label](#)
- Step 5: [Describe the Frontend Properties](#)

Step 1: Add a New Attribute

1. Open the product in edit mode. Under **Product Details** , tap **Add Attribute**.



New Attribute

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

Step 2: Describe the Basic Properties

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

Attribute Properties

3. Under **Attribute Properties**, enter a **Default Label** to identify the attribute.
4. Set **Catalog Input Type for Store Owner** to the type in input control to be used for data entry.
5. For Dropdown and Multiple Select input types, do the following:
 - a. Under **Manage Options**, tap **Add Option**.
 - b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
 - c. Tap **Add Option** and repeat the previous step for each option that you want to include in the list.
 - d. Select **Is Default** to use the option as the default value.
6. If you want to require the customer to choose an option before the product can be purchased, set **Values Required** to “Yes.”

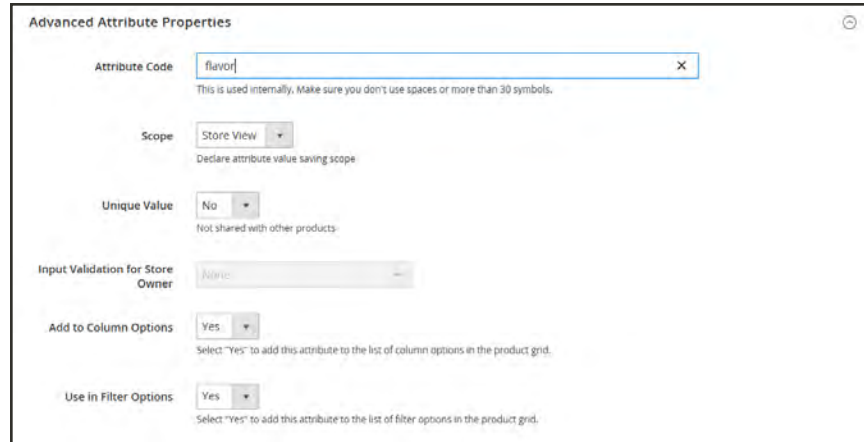
Is Default	Default Store View	Admin	
<input checked="" type="radio"/>	Vanilla	Vanilla	Delete
<input type="radio"/>	Chocolate	Chocolate	Delete
<input type="radio"/>	Strawberry	Strawberry	Delete

Add Option

Manage Options

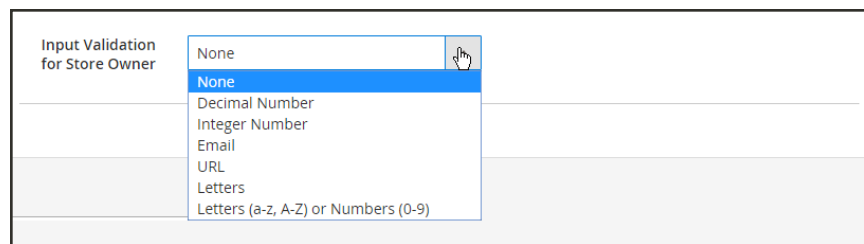
Step 3: Describe the Advanced Properties (if needed)

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




Advanced Attribute Properties

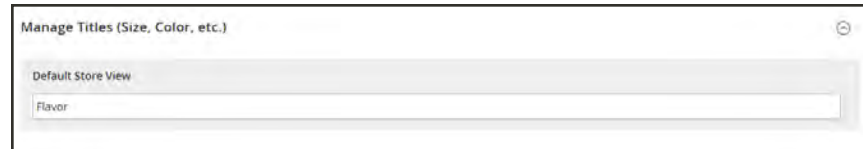
2. Set **Scope** to indicate where in your store hierarchy the attribute can be used.
3. If you want to prevent duplicate values from being entered, set **Unique Value** to “Yes.”
4. To run a validity test of any data entered into a text field, set **Input Validation for Store Owner** to the type of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



Input Validation

Step 4: Enter the Field Label

1. Expand  the **Manage titles** section.
2. Enter a **Title** to be used as a label for the field. If your store is available in different languages, you can enter a translated title for each view.



Manage Titles

Step 5: Describe the Storefront Properties

1. In the panel on the left, choose **Storefront Properties**.
2. If the attribute is to be available for search, set **Use in Search** to “Yes.”
3. To include the attribute in Product Compare, set **Comparable on Storefront** to “Yes.”
4. For dropdown, multiple select and price fields, do the following:
 - a. To use the attribute as a filter in layered navigation, set **Use in Layered Navigation** to “Yes.”
 - b. to use the attribute in layered navigation on search results pages, set **Use in Search Results Layered Navigation** to “Yes,”
 - c. In the **Position** field, enter a number to indicate the relative position of the attribute in the layered navigation block.
5. To use the attribute in price rules, set **Use for Promo Rule Conditions** to “Yes,”
6. To allow the text to be formatted with HTML, set **Allow HTML Tags on Frontend** to “Yes.” This setting makes the WYSIWYG editor available for the field.


To include the attribute in catalog page listings, set **Visible on Catalog Pages on Storefront** to “Yes.”

7. Complete the following settings if supported by your theme:
 - a. To include the attribute on the product detail page, set **Visible on Catalog Pages on Storefront** to “Yes.”
 - b. To include the attribute in product listings, set **Used in Product Listing** to “Yes.”
 - c. To use attribute as a sort parameter for product listings, set **Used for Sorting in Product Listing** to “Yes.”
8. When complete, tap **Save Attribute**.

Storefront Properties

Attribute Input Types

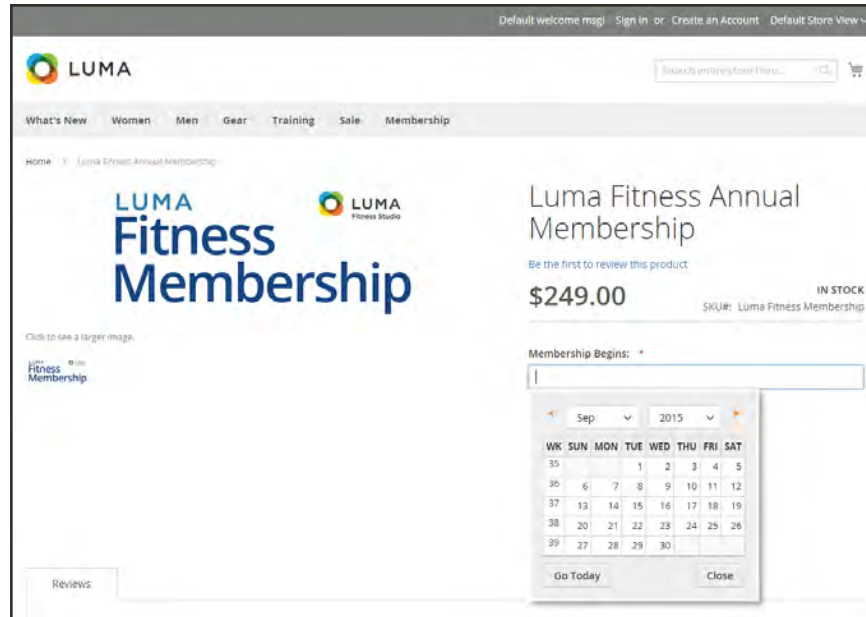
When viewed from the Admin, attributes are the fields that you complete when you create a product. The input type that is assigned to an attribute determines the type of data that can be entered and the format of the field or input control. From the standpoint of the customer, attributes provide information about the product, and are the options and data entry fields that must be completed to purchase a product.

PROPERTY	DESCRIPTION
Text Field	A single line input field for text.
Text Area	A multiple-line input field for entering paragraphs of text such as a product description. 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 thumbnail gallery, but can still be used.

PROPERTY	DESCRIPTION
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 the product. A visual swatch can be filled with a hexadecimal color value, or display an image.
Text Swatch	Displays a text value such as size. A text swatch looks like a button, and can be used to represent an attribute value such as size.

Date & Time Options

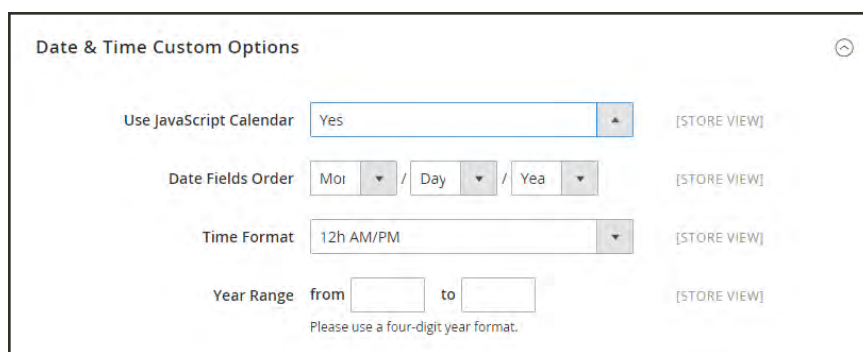
You can customize the format of date and time fields, and select the input control that is used for data entry. Dates values can be selected from a drop-down list, or pop-up calendar.



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



Date & Time Custom Options

Use JavaScript Calendar	Yes	[STORE VIEW]
Date Fields Order	Mo / Day / Yea	[STORE VIEW]
Time Format	12h AM/PM	[STORE VIEW]
Year Range	from <input type="text"/> to <input type="text"/>	[STORE VIEW]

Please use a four-digit year format.

Date & Time Custom Options

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

MARKETING

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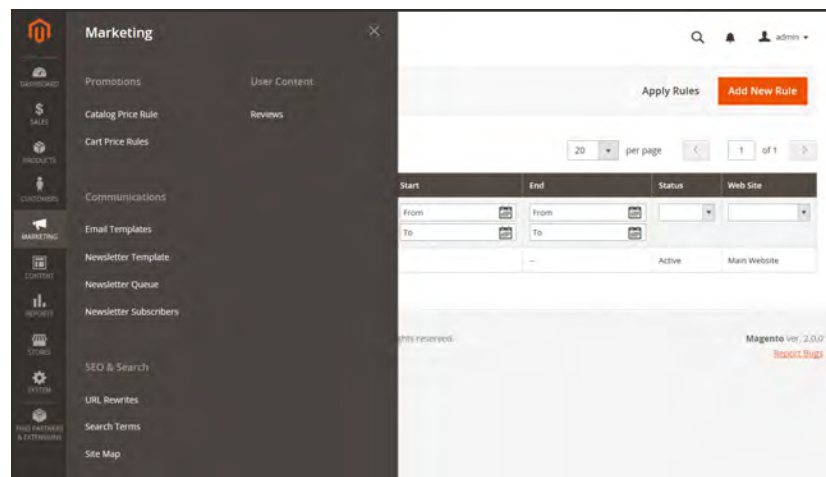
Ratings



CHAPTER 16:

Marketing Menu

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



Marketing Menu



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.



Communications

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



SEO & Search

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

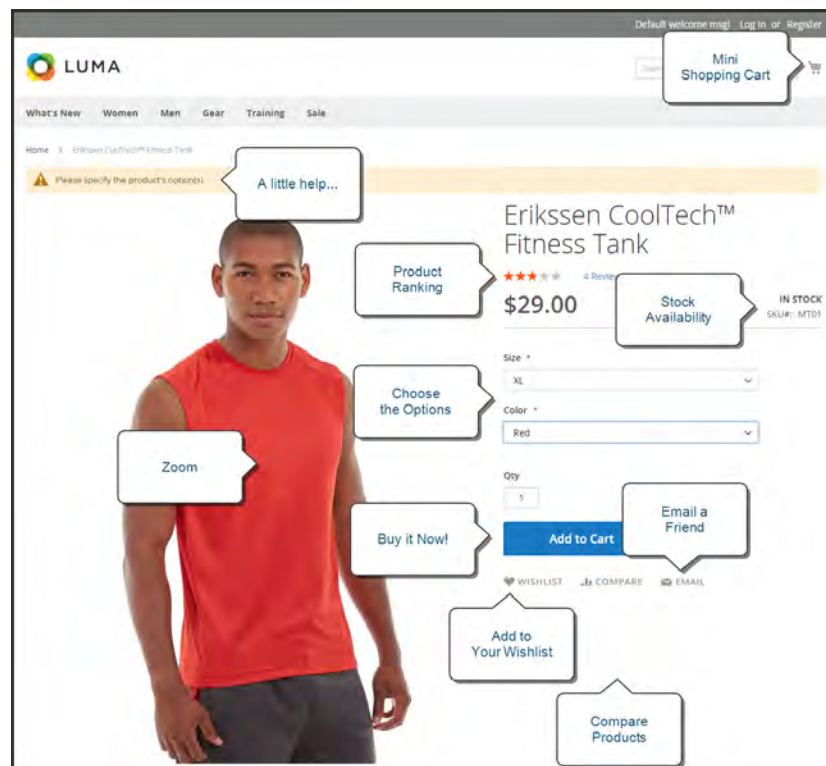


User Content

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

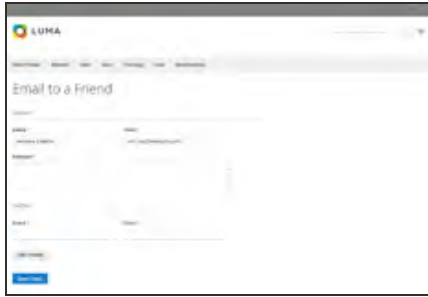
CHAPTER 17:**Shopping Tools**

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



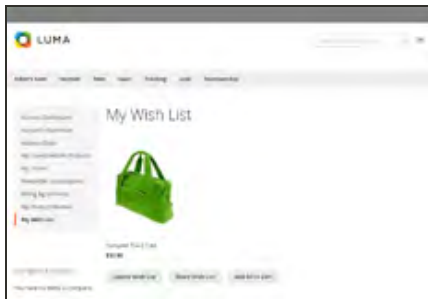
Product Page

Opportunities to Engage



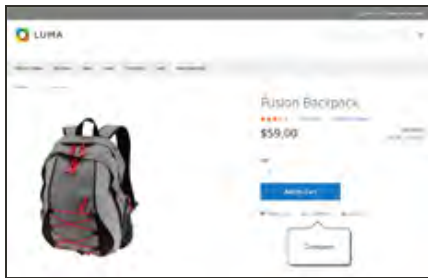
Email a Friend

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.

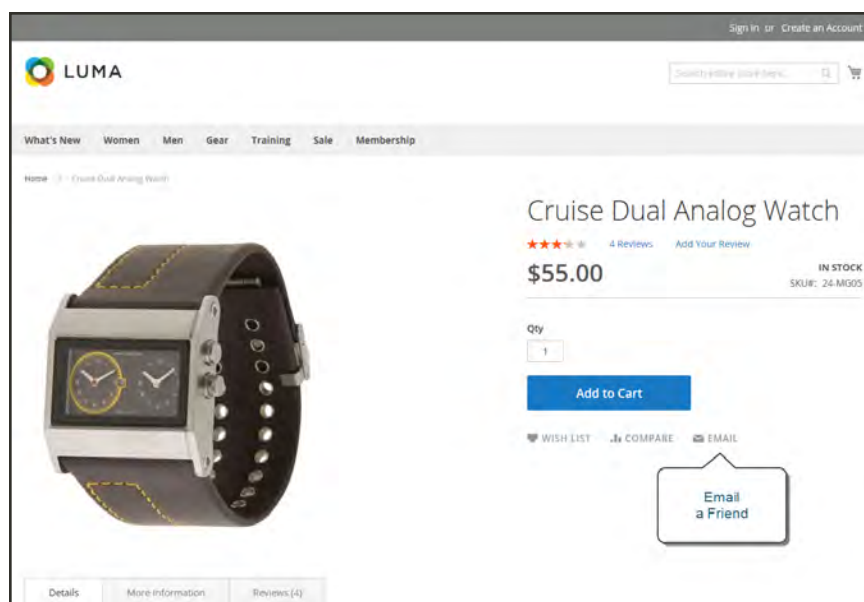


Product Reviews

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

Enabled	Yes	[STORE VIEW]
Select Email Template	Send Product Link to Friend (Default)	[STORE VIEW]
Allow for Guests	No	[STORE VIEW]
Max Recipients	5	[STORE VIEW]
Max Products Sent in 1 Hour	5	[STORE VIEW]
Limit Sending By	Cookie (unsafe)	[STORE VIEW]

Email Templates

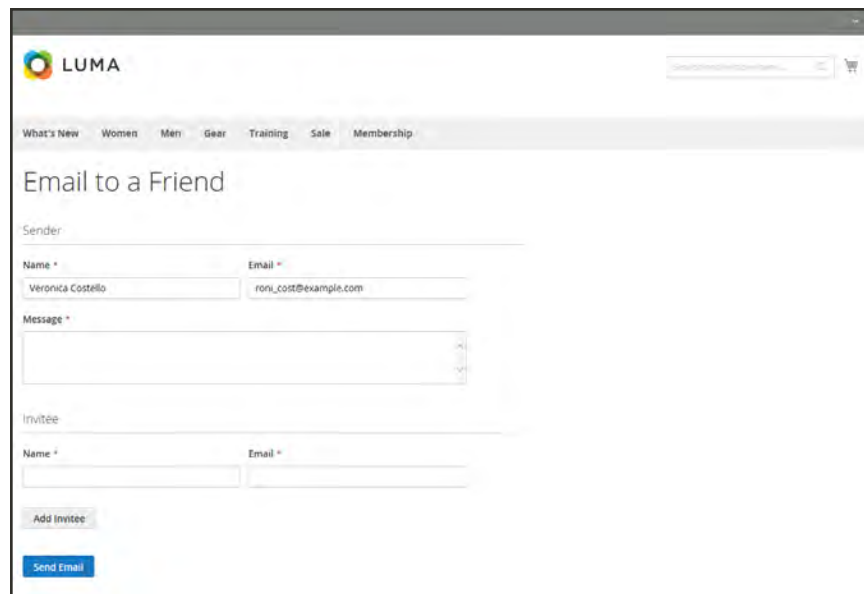
- a. Set **Enabled** to “Yes.”
 - b. Set **Select Email Template** to the template you want to use as the basis of the messages.
 - c. If you want to require that only registered customers can send email to friends, set **Allow for Guests** to “No.”
 - d. In the **Max Recipients** field, enter the maximum number of friends who can be on the distribution list for a single message.
 - e. In the **Max Products Sent in 1 Hour** field, enter the maximum number of products that can be shared by a single user with friends over a one-hour time period.
 - f. Set **Limit Sending By** to one of the following methods to identify the sender of emails:

IP Address	(Recommended) Identifies the sender by the IP address of the computer that is used to send the emails.
Cookie (unsafe)	Identifies the sender by browser cookie. This method is less effective because the sender can delete the cookie to bypass the limit.
4. When complete, tap **Save Config.**

To send email to a friend:

1. On a catalog page, click the **Email a Friend** link. Then, do one of the following:
 - Log in to your customer account.
 - Sign up for a new account.
2. Complete the **Message** and enter the recipient **Name** and **Email Address**. To add more recipients, do the following:
 - a. Tap **Add Invitee**.
 - b. Enter the **Name** and **Email Address** of the additional person.

You can send the message to as many additional people as the configuration allows.
3. When ready to send the message, tap **Send Email**.

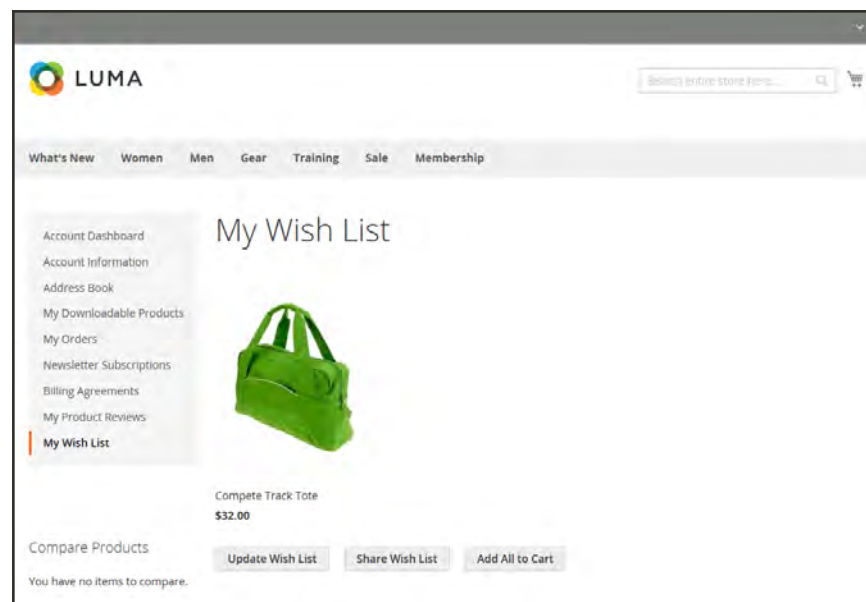
The screenshot shows the 'Email to a Friend' form on the LUMA website. At the top, the LUMA logo is on the left and a search bar with a shopping cart icon is on the right. Below the logo is a navigation menu with links for 'What's New', 'Women', 'Men', 'Gear', 'Training', 'Sale', and 'Membership'. The main heading is 'Email to a Friend'. The form is divided into three sections: 'Sender', 'Message', and 'Invitee'. The 'Sender' section has two input fields: 'Name *' with the value 'Veronica Costello' and 'Email *' with the value 'roni_cost@example.com'. The 'Message *' section is a large text area. The 'Invitee' section has two input fields: 'Name *' and 'Email *', both currently empty. Below these fields are two buttons: 'Add Invitee' and 'Send Email'.*Email a Friend Form*

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. When wish lists are enabled, the Add to Wishlist link appears on the category and product pages of each product in the store. Depending on the theme, it might be a text link or a graphic image.

Shared wish lists are sent from a store email address, but the body of the message contains a personalized note from the customer. You can customize the email template that is used when wish lists are shared, and choose the store contact that appears as the sender.

Wish lists can be updated from the dashboard of the **customer account**. Items can be added or transferred between the wish list and cart by the customer or by the store administrator.



Wishlist in Customer Account

When a product with multiple options is added to a wish list, any options that have been selected by the customer are included in the wish list item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wish list item. On the other hand, if the customer adds the same product to the wish list multiple times, the product appears only once, but with an updated quantity that reflects the number of times the product was added.

Configuring the Wish List

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

Enabled Yes [STORE VIEW]

General Options

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

Share Options

Email Sender General Contact [STORE VIEW]

Email Template Wish List Sharing (Default) [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.

Max Emails Allowed to be Sent 10 [STORE VIEW]
10 by default. Max - 10000

Email Text Length Limit 255 [STORE VIEW]
255 by default

Share Options

- a. Set **Email Sender** to the store contact that appears as the sender of the message.
- b. Set **Email Template** to the template to be used when a customer shares a wish list.
- c. To limit the number of emails a customer can send in a batch, enter the **Max Emails Allowed to be Sent**. The default value is 10, and the maximum allowed is 10,000.
- d. To limit the size of the message, enter the **Email Text Length Limit**. The default value is 255.
5. Expand ☺ the **My Wish List Link** section. Then, set **Display Wish List Summary** to one of the following:

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

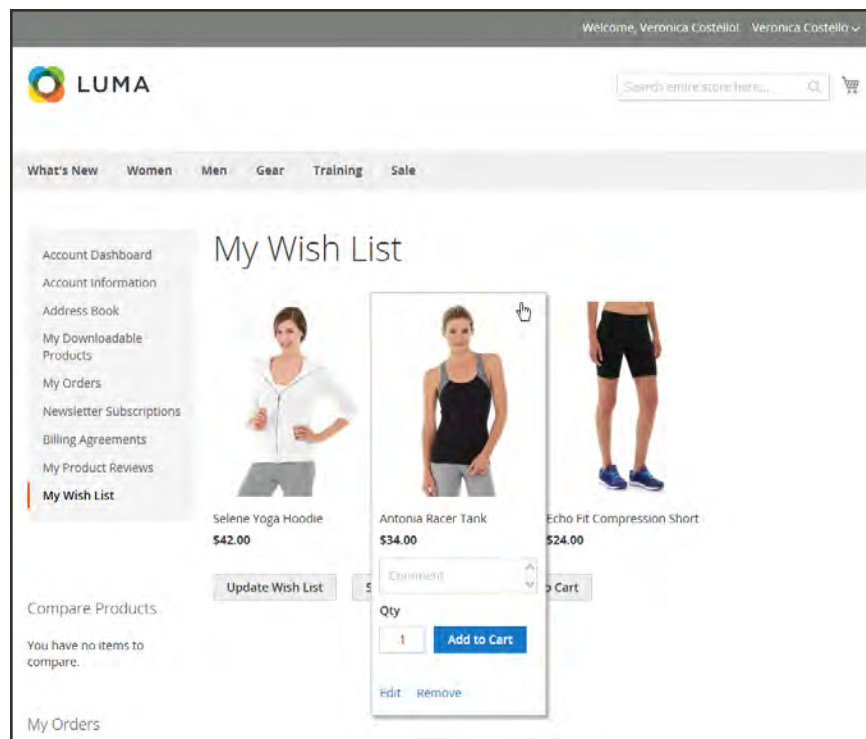


My Wish List Link

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

Sharing a Wish List

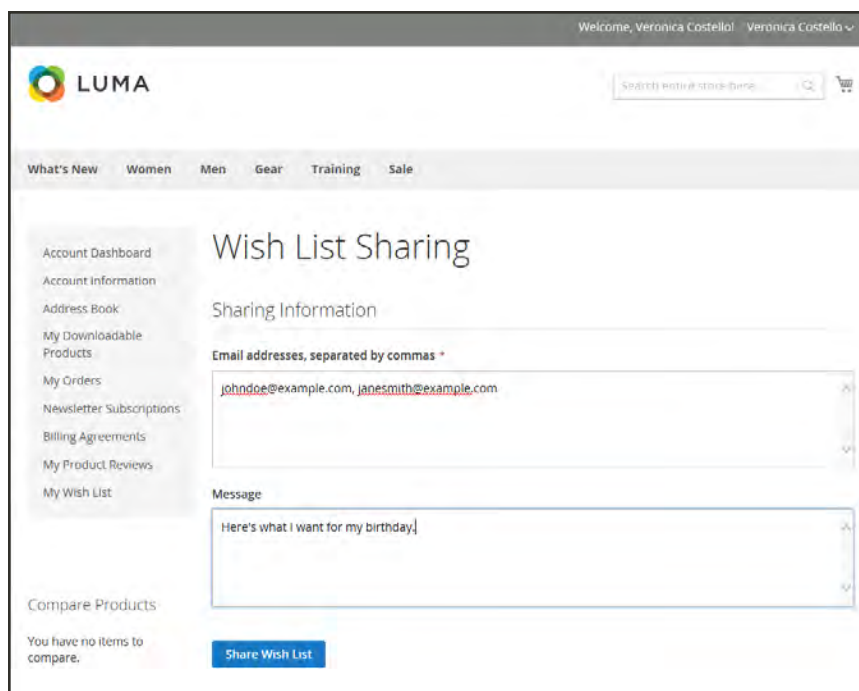
Customers can manage their wish lists from the dashboard of their accounts. Store administrators can also help customers manage their wish lists from the Admin.



Customer Dashboard with Wish List

To share your wish list:

1. In the panel on the left of your customer account dashboard, choose **My Wish List**.
2. To add a comment to a specific item, hover over the image. Then type your **Comment** in the box.
3. To share your wish list, do the following:
 - a. Tap **Share My Wish List**.
 - b. Enter the email address of each recipient, separated by a comma.
 - c. Enter a **Message** for the body of the email.
4. When you're ready to send the message, tap **Share Wish List**.



Customer Dashboard with Wish List

To transfer an item to your cart:

1. To add a single item, do the following:
 - a. Hover over the item.
 - b. Enter the **Qty** that you want to add to the cart.
 - c. Tap **Add to Cart**.
2. To transfer all wish list items to the cart, tap **Add All to Cart**.

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.



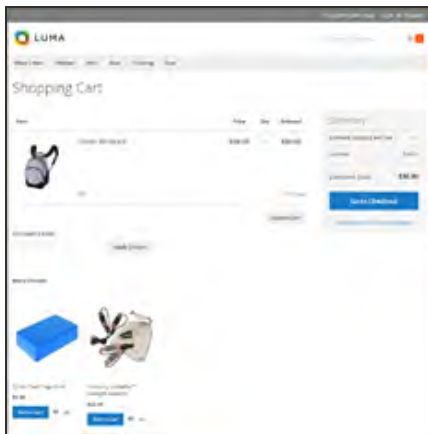
Related Products

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.

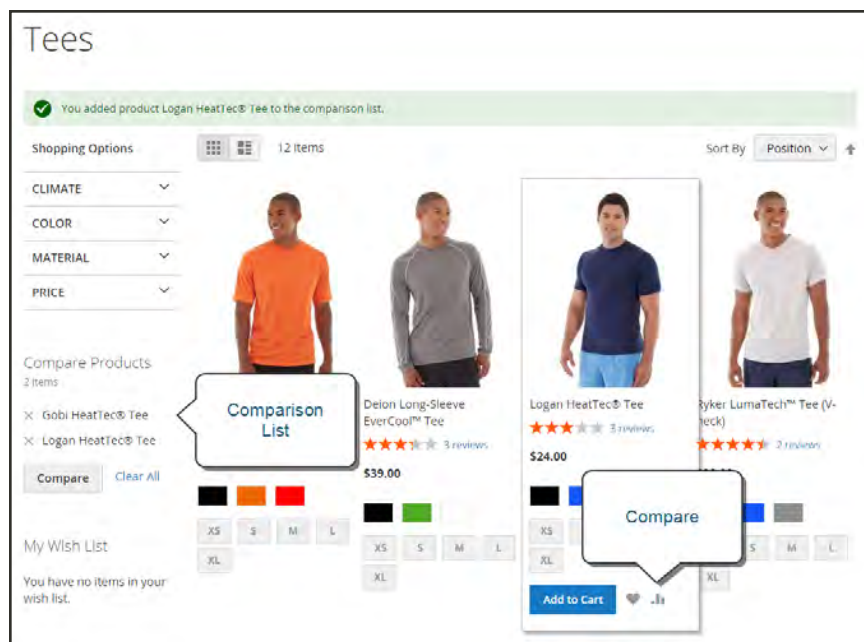


Cross-sells

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

Compare Products


Compare Products generates a detailed, side-by-side comparison of two or more products. You can customize the report to include additional attributes or remove ones that you don't want to include. Depending on the theme, the Add to Compare link might be represented by an icon or text.



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

[Print This Page](#)


		
	<p>Gobi HeatTec® Tee</p> <p>★★★★★ 3 Reviews</p> <p>\$29.00</p> <p>Add to Cart</p> <p>♥</p>	<p>Logan HeatTec® Tee</p> <p>★★★★★ 3 Reviews</p> <p>\$24.00</p> <p>Add to Cart</p> <p>♥</p>
SKU	MS04	MS10
Description	<p>When the training gets intense, the Gobi HeatTec® Tee works as hard as you do to maintain your cool. The moisture-wicking material promises drier comfort, while breathable side panels deliver extra stretch that's sure to keep you moving.</p> <ul style="list-style-type: none"> • Orange micropolyester shirt. • HeatTec® wicking fabric. • Crew neckline. • Machine wash/dry. 	<p>Soft and lightweight, the Logan HeatTec® Tee gets you through the long haul in total comfort. It boasts superior sweat-wicking performance to keep skin dry and cool, and strategic flat-lock seams to resist chafing.</p> <ul style="list-style-type: none"> • Semi-fitted. • Crew neckline. • Machine wash/tumble dry.

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:



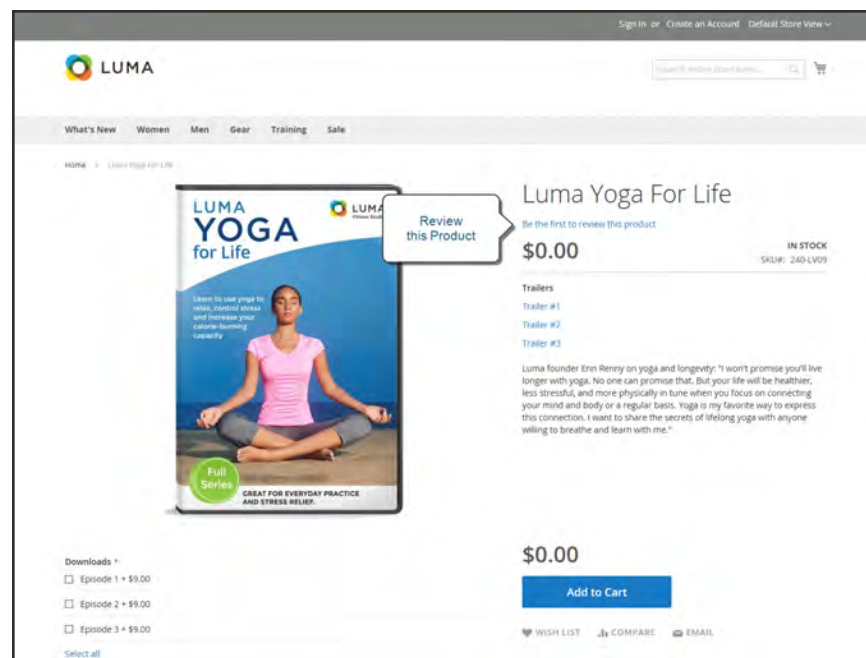
Recently Viewed/Compared Products

- 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.

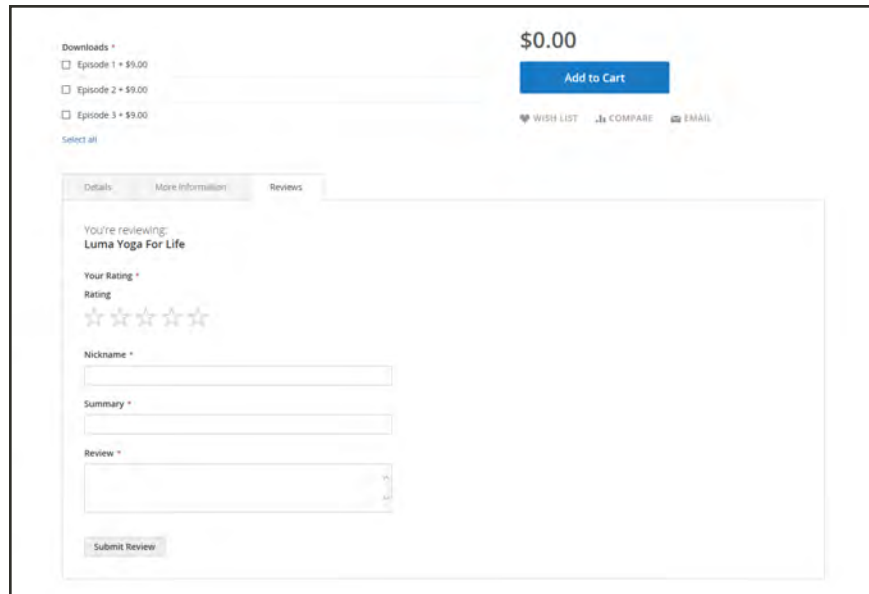
The configuration determines whether customers must open an account with your store before writing product reviews, or if they can submit reviews as guests. Requiring reviewers to open an account prevents anonymous submissions, and improves the quality of reviews.



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:

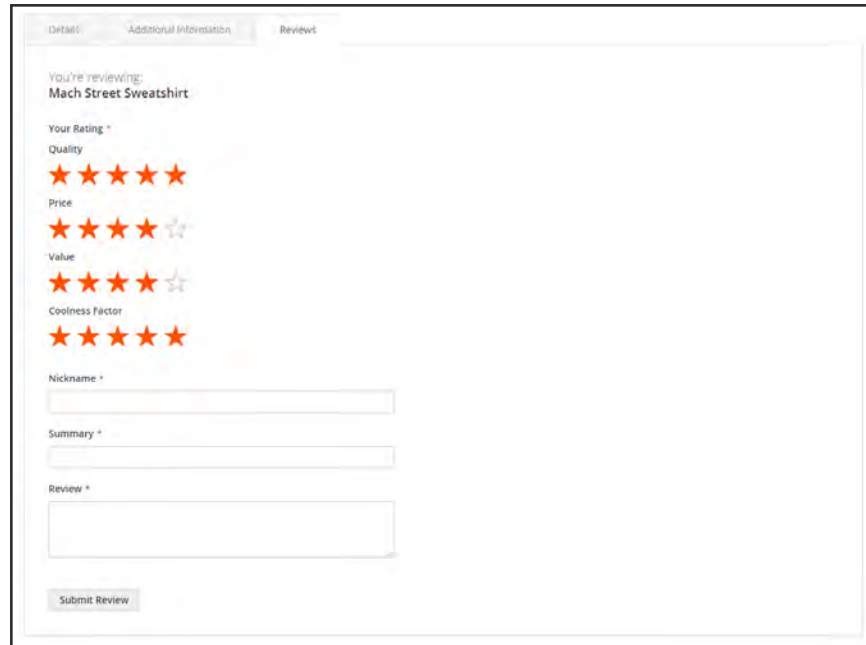
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Catalog**, select **Catalog**.
3. Expand ☺ the **Product Reviews** section.
4. Set **Allow Guests to Write Reviews** according to your preference.
5. When complete, tap **Save 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**.

Product Ratings

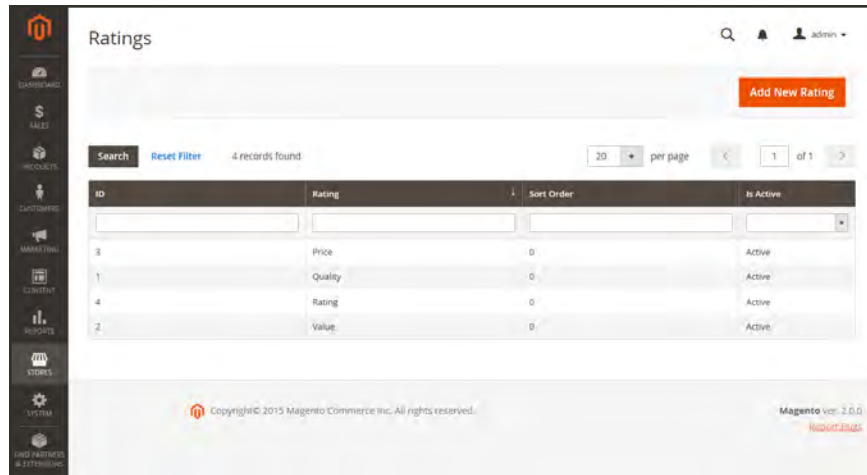
When customers review a product, the default ratings are quality, price, and value. In addition to these, you can add your own custom ratings. The five-star ratings that appear on catalog pages are averaged for each product.

A screenshot of a product review form for 'Mach Street Sweatshirt'. The form is titled 'YOU'RE REVIEWING: Mach Street Sweatshirt'. It features a 'Your Rating' section with five categories: 'Quality' (5 stars), 'Price' (4 stars), 'Value' (4 stars), and 'Coolness Factor' (5 stars). Below the ratings are input fields for 'Nickname', 'Summary', and 'Review', and a 'Submit Review' button.

Ratings

To create your own ratings:

1. On the Admin sidebar, tap **Stores**. Then under **Attributes**, choose **Ratings**.
2. In the upper-right corner, tap **Add New Rating**.



Ratings

3. In the Rating Title section, enter the **Default Value** for the new rating. If applicable, enter the translation for each store view.

Rating Title

Default Value *

Default Store View

French

German

Spanish

Rating Title

4. In the Rating Visibility section, set **Visibility In** to the store view where the rating is to be used. (Hold down the Ctrl key to select multiple options.)
Ratings are not visible unless assigned to a store view.
5. In the **Sort Order** field, enter a number to determine the order of this rating when listed with others.

The screenshot shows a configuration form titled "Rating Visibility". It contains three main sections: "Visibility", "Is Active", and "Sort Order". The "Visibility" section has a dropdown menu with the following options: "Main Website", "Main Website Store", "Default Store View", "French", "German", and "Spanish". A question mark icon is located to the right of the dropdown. The "Is Active" section has a checkbox that is currently unchecked. The "Sort Order" section has a text input field.

Rating Visibility

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

Promotions

In this section of the guide, you will learn how to set up product relationships, and use price rules to trigger discounts based on a variety of conditions.

You can use price rules to offer customer incentives, such as to:

- Send your best customers a coupon for a discount on a specific product
- Offer free shipping for purchases over a certain amount
- Schedule a promotion for a period of time

Price rules are set up in advance, and spring into action whenever the required conditions are met.

Contents

Catalog Price Rules

Multiple SKUs

Cart Price Rules

Coupon Codes

Coupon Report

Free Shipping Promotion

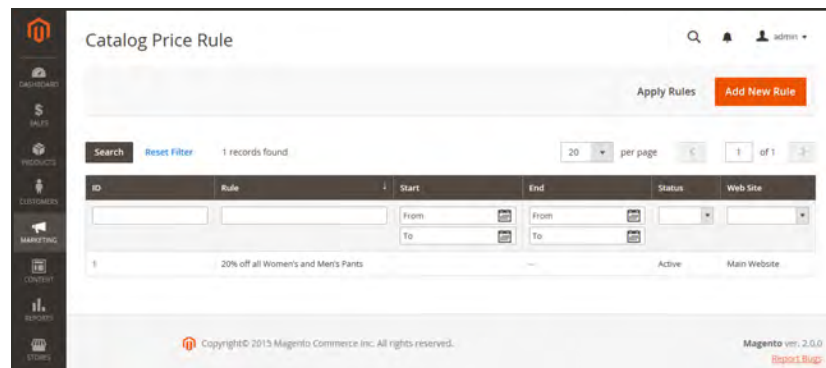
Buy X Get Y Free

Discount with Minimum Purchase

CHAPTER 18:

Catalog Price Rules

Catalog price rules can be used to selectively offer products at a discounted price, based on a set of conditions. Catalog price rules do not use coupon codes, because they are triggered before a product is placed into the shopping cart.



Catalog Rules

Creating a Catalog Price Rule

Process Overview:

Step 1: [Add a New Rule](#)

Step 2: [Define the Conditions](#)

Step 3: [Define the Actions](#)

Step 4: [Apply the Rule](#)

Step 1: Add a New Rule

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


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

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

The screenshot shows the 'New Catalog Price Rule' form. The 'Rule Information' section is active, showing the following fields:

- Rule Name:** A text input field.
- Description:** A larger text area.
- Status:** A dropdown menu currently set to 'Inactive'.
- Websites:** A dropdown menu currently set to 'Main Website'.
- Customer Groups:** A dropdown menu with options: 'NOT LOGGED IN', 'General', 'Wholesale', and 'Retailer'.
- From:** A date input field with a calendar icon.
- To:** A date input field with a calendar icon.
- Priority:** A text input field.

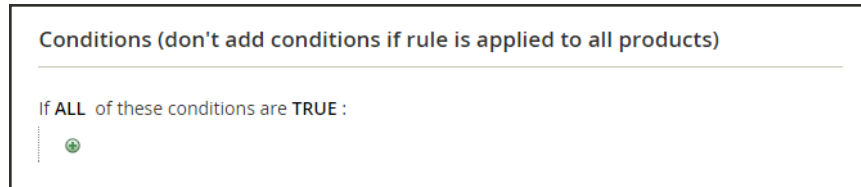
Rule Information

5. Set **From** and **To** dates to define the range of dates when the rule will be in effect. You can either enter the dates, or select the dates from the Calendar .
 - If you leave the dates blank, the rule is enabled as soon as the price rule is saved.
6. Enter a number to establish the **Priority** of this rule in relation to other rules.

Step 2: Define the Conditions

Most of the available conditions are based upon existing attribute values. To apply the rule to all products, leave the conditions blank.

1. In the panel on the left, choose **Conditions**. The first rule begins:




Condition - Line 1

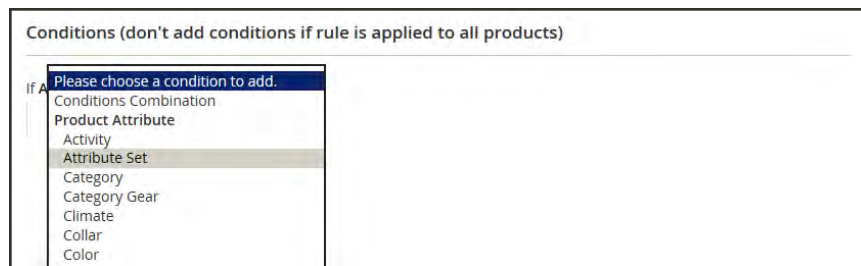
The statement has two bold links, which when clicked, display the options for that part of the statement. If you save the condition without making additional selections, the rule applies to all products.

- 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.

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



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.”



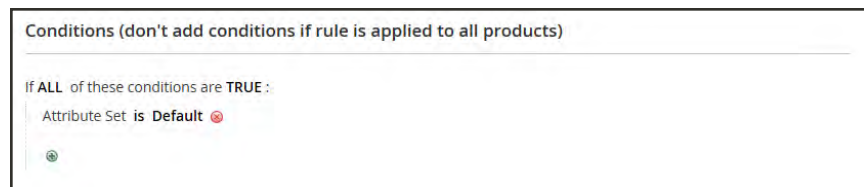
Condition Line 2, Part 1

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

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

```
If ALL of these conditions are TRUE:
Attribut Set is ...
```


- b. Click the **is** link, and choose the comparison operator that describes the condition to be met. In this example, the options are “IS” or “IS NOT.”
- c. Then, click 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
```

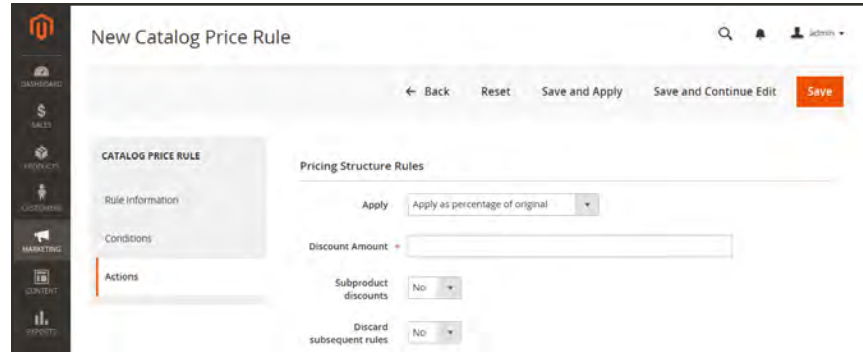
3. To add another line to the statement, tap the **Add**  button, and choose one of the following:
 - Conditions Combination
 - Product Attribute

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



Actions

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

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

3. Do one of the following:
 - Enter the **Discount Amount**.
 - To apply the discount amount to associated products, set **Subproduct Discounts** to “Yes.” Select the pricing structure, and enter the **Discount Amount**.
4. To stop processing other rules after this rule is applied, set **Discard Subsequent Rules** to “Yes.” This safeguard prevents customers from receiving multiple discounts for the same product.
5. Tap **Save and Continue Edit**.

Pricing Structure Rules

Apply

Discount Amount *

Subproduct discounts

Apply

Discount Amount *

Discard subsequent rules

*Pricing Structure Rules***Step 4: Apply the Rule**

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

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

The screenshot shows the 'Catalog Price Rule' management interface. At the top, there are buttons for 'Apply Rules' and 'Add New Rule'. A yellow notification banner indicates 'You saved the rule.' Below this, a search bar and filter options are present. The main area contains a table with the following data:

ID	Rule	Start	End	Status	Web Site
2	10% Discount	Dec 7, 2015	Dec 31, 2015	Active	Main Website
1	20% off all Women's and Men's Plants	-	-	Active	Main Website

At the bottom of the page, there is a copyright notice: 'Copyright © 2019 Magento Commerce Inc. All rights reserved.' and the version 'Magento ver. 2.0.0'.

Apply Rules

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


Price Rule with Multiple SKUs

A single price rule can be applied to multiple SKUs, which makes it possible to create a variety of promotions based on a product, brand, or category. In the following illustration, multiple products are selected for a catalog price rule.

To apply a price rule to multiple SKUs:

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

If ANY of these conditions are TRUE

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

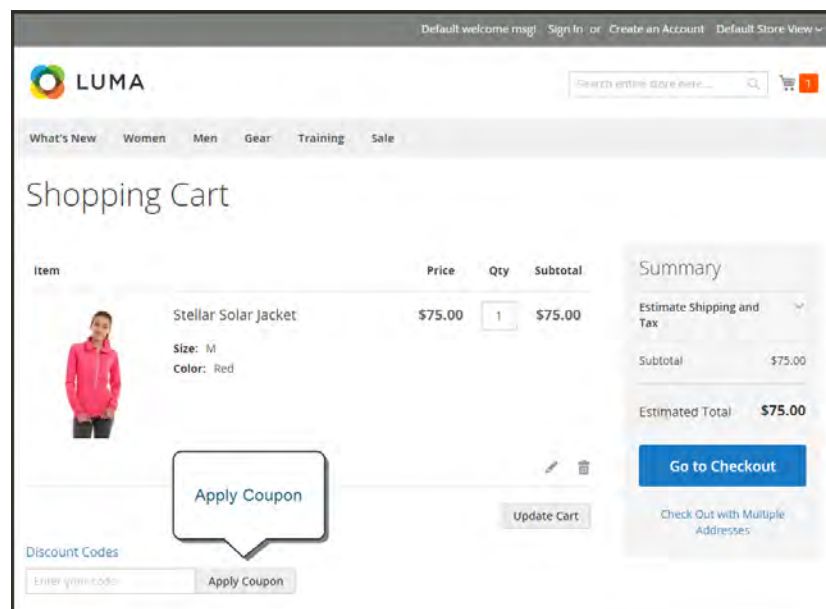
When you create a new price rule, it might take an hour or so to become available. Make sure to allow enough time for it to get into the system. Then, test the rule to make sure that it works correctly. Unless otherwise specified, price rules are automatically processed with other system rules each night.

CHAPTER 19:

Cart Price Rules

Cart price rules apply discounts to items in the shopping cart, based on a set of conditions. The discount can be applied automatically as soon as the conditions are met, or when the customer enters a valid coupon code. When applied, the discount appears in the cart under the subtotal. A cart price rule can be used as needed for a season or promotion by changing its status and date range.

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



Apply Coupon in Cart

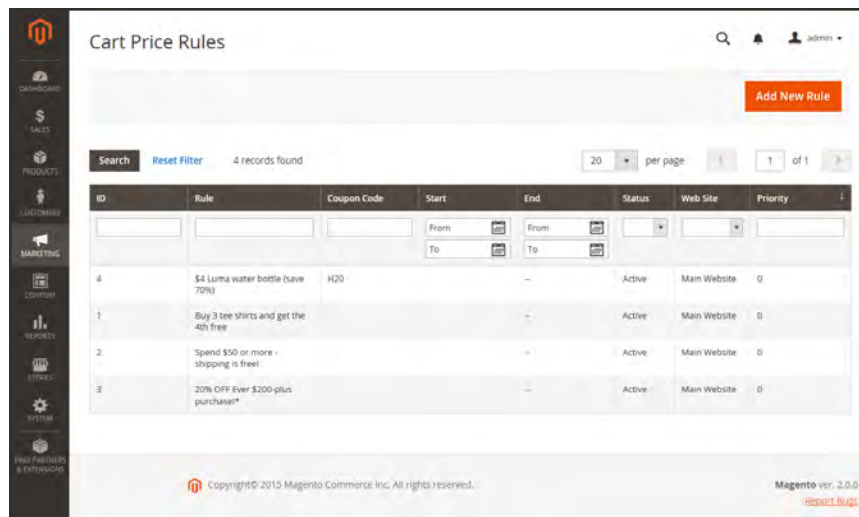
Creating a Cart Price Rule

Process Overview:

- Step 1: [Add a New Rule](#)
- Step 2: [Define the Conditions](#)
- Step 3: [Define the Actions](#)
- Step 4: [Complete the Labels](#)
- Step 6: [Apply the Rule](#)

Step 1: Add a New Rule

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



Cart Price Rules

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

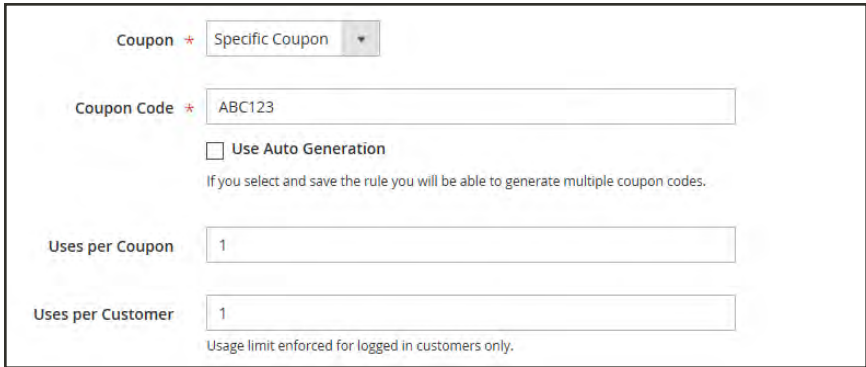
The screenshot shows the 'New Cart Price Rule' configuration page. The 'General Information' section is active, displaying the following fields and options:

- Rule Name:** Text input field.
- Description:** Text area.
- Status:** Dropdown menu set to 'Active'.
- Websites:** Dropdown menu set to 'Main Website'.
- Customer Groups:** Dropdown menu with options: 'NOT LOGGED IN', 'General', 'Wholesale', and 'Retailer'.
- Coupon:** Dropdown menu set to 'No Coupon'.
- Uses per Customer:** Text input field with a note: 'Usage limit enforced for logged in customers only.'
- From:** Date picker.
- To:** Date picker.
- Priority:** Text input field.
- Public in RSS Feed:** Dropdown menu set to 'Yes'.

General Information

2. Under General Information, complete the **Rule Name** and **Description**.
3. For the rule to go into effect immediately, set **Status** to “Active.”
4. To establish the **scope** of the rule, do the following:
 - a. Select the **Websites** where the promotion is to be available.
 - b. Select the **Customer Groups** to which the promotion applies.
 - For the promotion to be available only to registered customers, do not select the “NOT LOGGED IN” option.
5. To associate a **coupon** with the price rule, set **Coupon** to “Specific Coupon.” Then, do the following:
 - a. Enter a numeric **Coupon Code** that the customer must enter to receive the discount.
 - b. To set a limit on the number of times the coupon can be used, complete the following:

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



Coupon * Specific Coupon ▼


Coupon Code * ABC123

Use Auto Generation
If you select and save the rule you will be able to generate multiple coupon codes.

Uses per Coupon 1

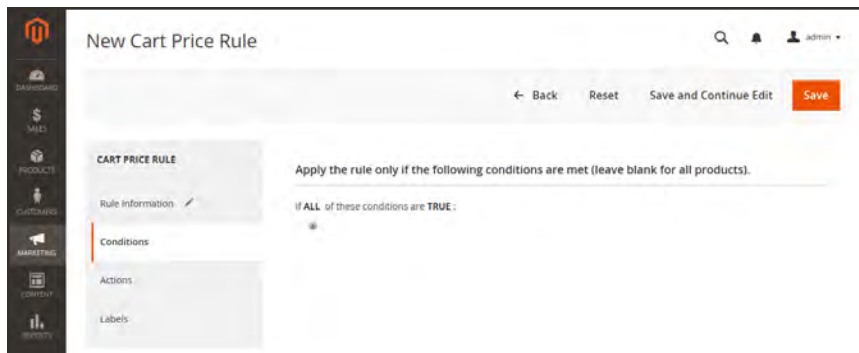
Uses per Customer 1
Usage limit enforced for logged in customers only.

Coupon Settings

6. Use the **Calendar**  to set the **From** and **To** date range for the promotion.
7. Enter a number to determine the **Priority** of this price rule in relation to the Action settings of other price rules that might be active at the same time. (Number 1 has the highest priority.)
8. To apply the rule to published listings in **RSS feeds**, set **Public In RSS Feed** to “Yes.”

Step 2: Define the Conditions

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



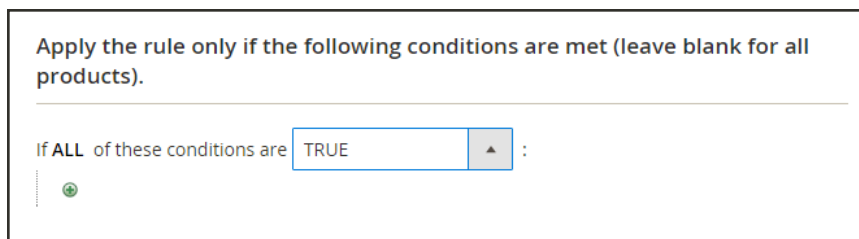
Conditions

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


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

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

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

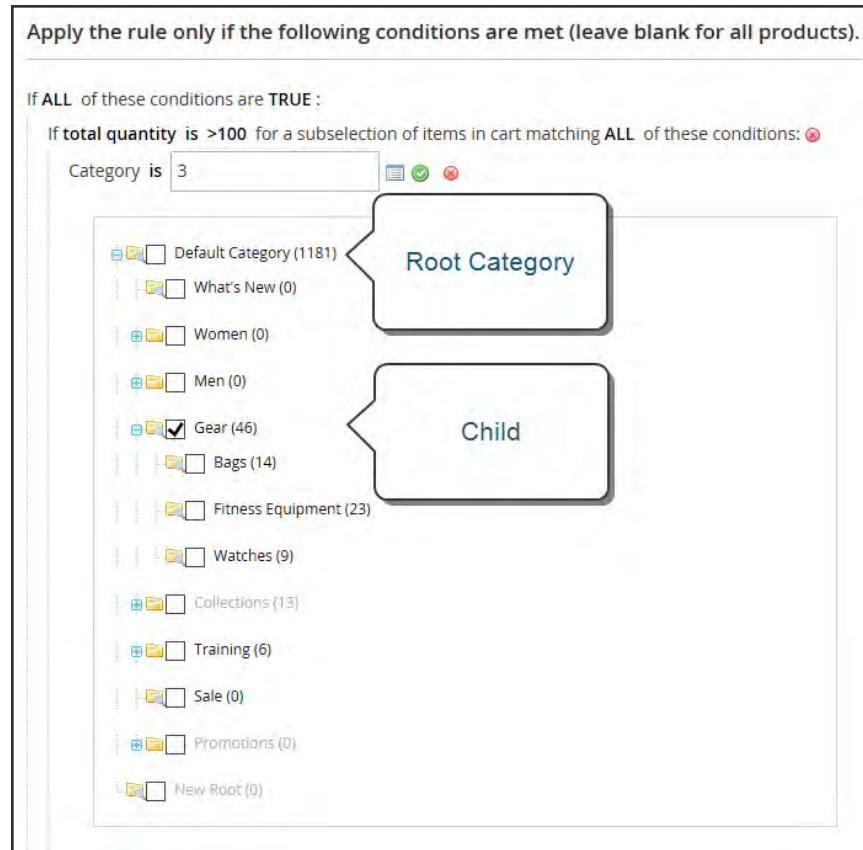


Condition - Line 1

2. Tap **Add**  at the beginning of the next line. Then, choose one of the following options from the list to describe the condition that you want to set for the rule.
 - Product attribute combination
 - Products subselection
 - Conditions combination

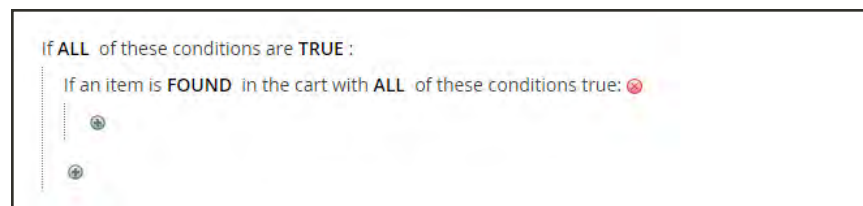
- Cart Attribute

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



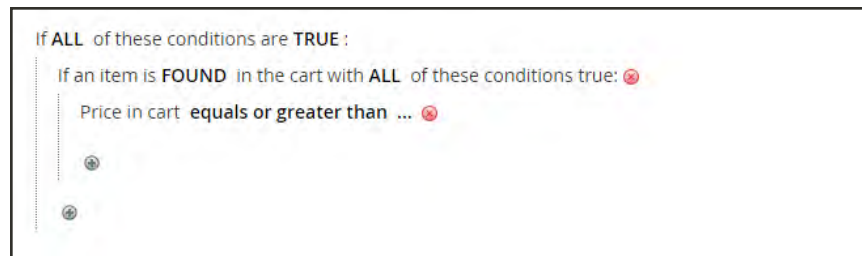
Choosing a Category for a Condition

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



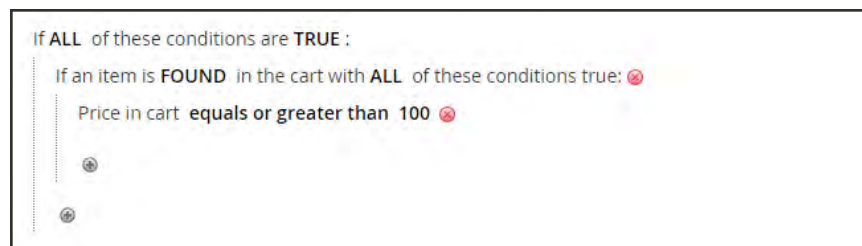
Condition - Line 2, Part 1

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

*Condition - Line 2, Part 1*

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

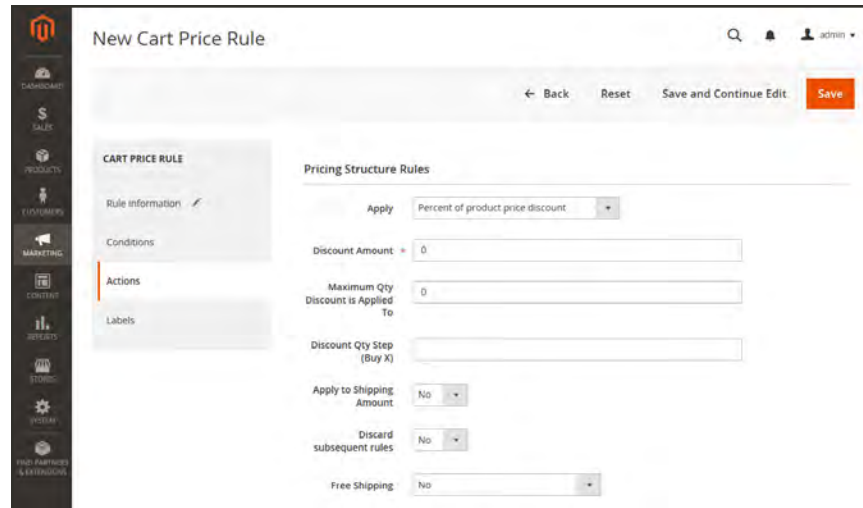
3. Click the ellipsis [...](#) link, which means "there is more," and enter the amount that triggers the discount. The amount appears in the statement to complete the condition.

*Completed Condition*

4. To add more conditions, tap **Add** (+) and define another condition.
You can repeat the process as many times as needed to describe the condition.
If at any time you want to delete part of the statement, click **Delete** (x) at the end of the line.

Step 3: Define the Actions

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



Cart Price Rule Actions

1. In the panel on the left, choose **Actions**. Then, do the following:
 - a. Set **Apply** to one of the following discount options:

Percent of product price discount	Discounts item by subtracting a percentage from the original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from original price. The discount applies to each qualifying item in the cart. For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.
Fixed amount discount for whole cart	Discounts the entire cart by subtracting a percentage from the cart total. For example: Enter 10 in Discount Amount to subtract 10% from the cart total.
Buy X get Y free	Defines a quantity that the customer must purchase to receive a quantity for free. (The Discount Amount is Y.)
 - b. Enter the **Discount Amount** as a number, without symbols. For example, depending on the discount option selected, the number 10 might indicate a percentage, a fixed amount, or a quantity of items.
 - c. In the **Maximum Qty Discount is Applied To** field, enter the maximum number of the same product that can qualify for the discount in the same purchase.
 - d. To apply the discount to the shipping amount, set **Apply to Shipping Amount** to “Yes.”

- e. 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.
- f. To give the customer reward points for triggering the price rule, enter the number of points the price rule is worth.
- g. If you want to extend free shipping for orders that meet conditions, set **Free Shipping to** one of the following:
 - For matching items only
 - For shipment with matching items

You can continue to define as many levels as needed to describe the conditions to be met.

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

Step 4: Complete the Labels

The label appears on the order below the subtotal to identify the discount. You can enter a default label for all store views, or enter a different label for each view.

1. In the panel on the left, choose **Labels**.
2. Do one of the following:
 - Under **Default Label**, enter the text for the **Default Rule Label for All Store Views**.
 - Under **Store View Specific Labels**, enter an appropriate label for each store view.

The screenshot shows the 'CART PRICE RULE' configuration page in the Magento Admin. The 'Labels' tab is selected in the left sidebar. The 'Default Label' section has a text input field containing '15% Discount Coupon'. Below it, the 'Store View Specific Labels' section is expanded to show a table for the 'Main Website'.

Store View	Label
Main Website Store	15% Discount Coupon
English	15% Discount Coupon
French	
German	
Spanish	

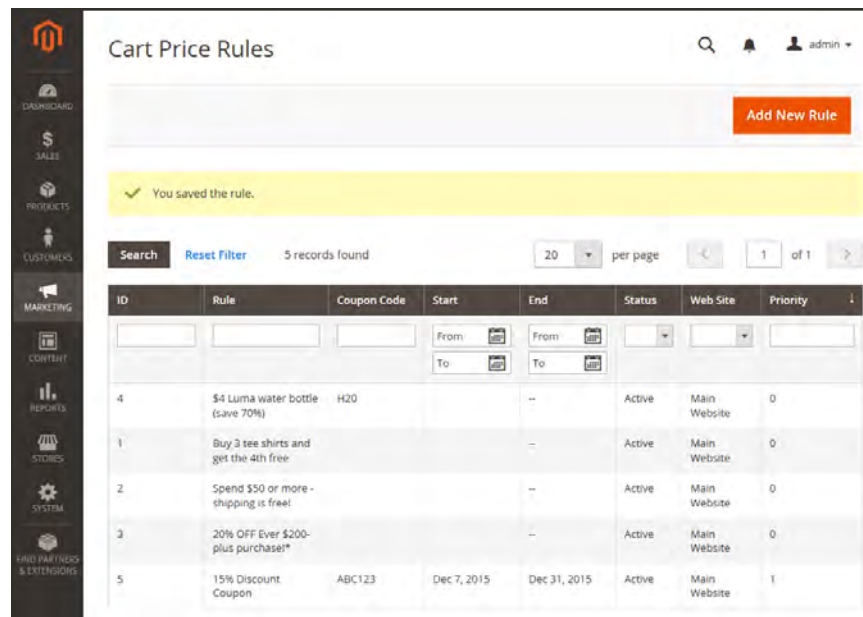
Default Label

3. In the **Store View Specific Labels** section, enter the label text for each store view. For example, if each store view is in a different language, enter the label translation for each view.

Step 5: Apply the Rule

1. When complete, tap **Save Rule**.
2. Test the rule to make sure that it works correctly.

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



Cart Price Rule Saved

Field Descriptions

FIELD	DESCRIPTION
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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.

Field Descriptions (cont.)

FIELD	DESCRIPTION										
Status	(Required) Determines if the rule is currently active in the store. Options: Active / Inactive										
Websites	(Required) Identifies the websites where the rule can be used.										
Customer Groups	(Required) Identifies the customer groups to which the rule applies.										
Coupon	(Required) Indicates if a coupon is associated with the rule. Options: <table border="0" style="margin-left: 20px;"> <tr> <td>No Coupon</td> <td>No coupon is associated with the rule.</td> </tr> <tr> <td>Specific Coupon</td> <td>A specific coupon is associated with the rule. <table border="0" style="margin-left: 20px;"> <tr> <td>Coupon Code</td> <td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td> </tr> <tr> <td>Use Auto Generation</td> <td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td> </tr> </table> </td> </tr> <tr> <td>Auto</td> <td>Displays the Coupons Information section to define the format of the coupon codes to be generated.</td> </tr> </table>	No Coupon	No coupon is associated with the rule.	Specific Coupon	A specific coupon is associated with the rule. <table border="0" style="margin-left: 20px;"> <tr> <td>Coupon Code</td> <td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td> </tr> <tr> <td>Use Auto Generation</td> <td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td> </tr> </table>	Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.	Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.	Auto	Displays the Coupons Information section to define the format of the coupon codes to be generated.
No Coupon	No coupon is associated with the rule.										
Specific Coupon	A specific coupon is associated with the rule. <table border="0" style="margin-left: 20px;"> <tr> <td>Coupon Code</td> <td>When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.</td> </tr> <tr> <td>Use Auto Generation</td> <td>Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.</td> </tr> </table>	Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.	Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.						
Coupon Code	When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion.										
Use Auto Generation	Select the checkbox to automatically generate multiple coupon codes that can be used with the promotion.										
Auto	Displays the Coupons Information section to define the format of the coupon codes to be generated.										
Uses per Coupon	The number of times the coupon code can be used.										
Uses per Customer	Determines how many times the coupon code can be used by the same registered customer who belongs to any selected customer group. Does not apply to guest shoppers who are members of the NOT LOGGED IN customer group, or to customers who shop without logging in to their accounts. For no limit, leave blank.										
From	The first date the coupon can be used.										
To	The last date the coupon can be used.										

Field Descriptions (cont.)

FIELD	DESCRIPTION
Priority	A number that indicates the priority of this rule in relation to others. The highest priority is number 1.
Public in RSS Feed	Determines if the promotion is included in your store’s public RSS feed. Options: Yes / No.

ACTIONS

Apply	Determines the type of calculation that is applied to the purchase. Options:
Percent of product price discount	Discounts item by subtracting a percentage from the original price. For example: Enter 10 in Discount Amount for an updated price that is 10% less than the original price.
Fixed amount discount	Discounts item by subtracting a fixed amount from original price. For example: Enter 10 in Discount Amount for an updated price that is \$10 less than the original price.
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: <table border="0"> <tr> <td>No</td> <td>Free shipping is not available when a coupon that is based on the rule is used.</td> </tr> <tr> <td>For matching items only</td> <td>Free shipping is available only for specific items in the cart that match the rule.</td> </tr> <tr> <td>For shipment with matching items</td> <td>Free shipping is available for the entire cart when a coupon that is based on the rule is used.</td> </tr> </table>	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.
No	Free shipping is not available when a coupon that is based on the rule is used.						
For matching items only	Free shipping is available only for specific items in the cart that match the rule.						
For shipment with matching items	Free shipping is available for the entire cart when a coupon that is based on the rule is used.						

LABELS

Default Rule Label for All Store Views	A default label that identifies the discount and can be used for all store views.
Store View Specific Labels	If applicable, a different label that identifies the discount for each store view.


Coupon Codes

Coupon codes are used with **cart price rules** to apply a discount when a set of conditions is met. For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount. To apply the coupon to a purchase, the customer can enter the coupon code in the cart, or possibly at the cash register of your “brick and mortar” store. Here are a few ways that you can use coupons in your store:

- Email coupons to customers
- Produce printed coupons
- Create in-store coupons for mobile users

Coupon codes can be sent by email, or included in newsletters, catalogs, and advertisements. The list of coupon codes can be exported and sent to a commercial printer. You can also create in-store coupons with a quick response code that shoppers can scan with their smart phones. The QR code can link to a page on your site with more information about the promotion.

Method 1: Create a Specific Coupon

1. Follow the instructions to create a **cart price rule**.
2. On the General Information page, set **Coupon** to “Specific Coupon.”
 - a. Enter a numeric **Coupon Code** to be used with the promotion.
 - b. To limit the number of times the coupon can be used, complete the following:
 - Uses per Coupon
 - Uses per CustomerFor unlimited use, leave these fields blank.
 - c. To make the coupon valid for a limited period of time, complete the **From** and **To** dates. To select the date, tap the **Calendar**  button next to each field. If you leave the date range empty, the rule will never expire.
3. Complete the cart price rule.

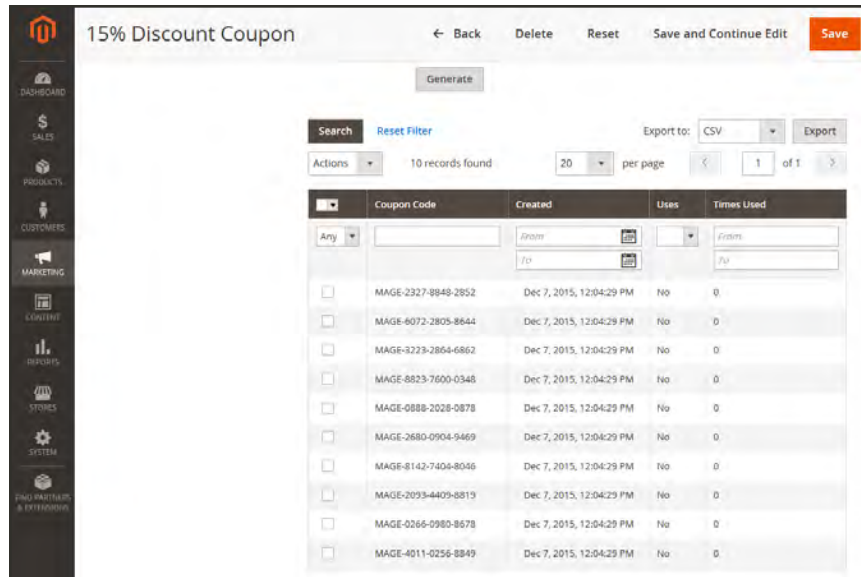
Method 2: Generate a Batch of Coupons

1. Follow the instructions to create a **cart price rule**.
2. On the General Information page, mark the **Use Auto Generation** checkbox.
3. In the panel on the left, choose **Manage Coupon Codes**. Then under Coupons Information, do the following:

The screenshot shows the Magento Admin interface for configuring a '15% Discount Coupon'. The left sidebar is open to the 'Manage Coupon Codes' option. The main content area is titled '15% Discount Coupon' and includes a navigation bar with 'Back', 'Delete', 'Reset', 'Save and Continue Edit', and a 'Save' button. Below the navigation bar, there are two main sections: 'CART PRICE RULE' and 'Coupons Information'. The 'CART PRICE RULE' section has a sub-menu with 'Rule Information', 'Conditions', 'Actions', 'Labels', and 'Manage Coupon Codes'. The 'Coupons Information' section contains the following fields: 'Coupon Qty' (10), 'Code Length' (12, with a note 'Excluding prefix, suffix and separators.'), 'Code Format' (Numeric), 'Code Prefix' (MAGE-), 'Code Suffix', and 'Dash Every X Characters' (4, with a note 'If empty no separation.'). A 'Generate' button is located at the bottom of the 'Coupons Information' section.

Manage Coupon Codes

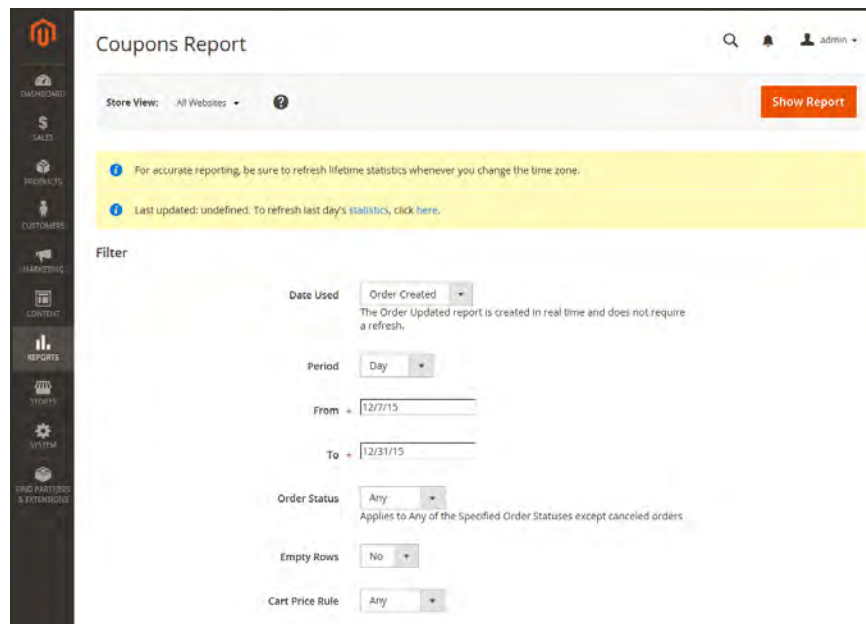
- a. In the **Coupons Qty** field, enter the number of coupons that you want to generate.
 - b. Enter the **Code Length**, not including the prefix, suffix, or separators.
 - c. Set the **Code Format** to one of the following:
 - Alphanumeric
 - Alphabetical
 - Numeric
 - d. (Optional) Enter a **Code 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.
4. After completing the code format, tap **Generate**. The list of generated codes appears below.



Generated Coupon Codes

Coupons Report

The Coupons Report can be filtered for a specific store view, time period, order status, and price rule,



Coupon Report Filters

To run the report:

1. On the Admin sidebar, tap **Reports**. Then under **Sales** choose **Coupons**.
2. If you have multiple store views, set **Store View** in the upper-left corner to establish the scope of the report.
3. To refresh the sales **statistics** for the day, click the message at the top of the workspace.
4. To filters the data, so the following:
 - a. Set **Date Used** to one of the following:
 - Order Created
 - Order UpdatedThe 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.

Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a **coupon**. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and “shipped” to complete the **workflow**.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

Process Overview:

Step 1: **Enable Free Shipping**

Step 2: **Create the Shopping Cart Price Rule**

Step 3: **Test the Rule**

Step 1: Enable Free Shipping

1. Enable **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 Shopping Cart Price Rule

1. On the Admin sidebar, tap **Marketing**. Then under **Promotions**, choose **Cart Price Rules**.
2. Follow the steps below to set up the type of free shipping promotion that you want to offer.

Example 1: Free Shipping for Any Order

1. Complete the **Rule Information** settings as follows:
 - a. Enter a **Rule Name** for internal reference.
 - b. Enter a brief **Description** to describe the rule.
 - c. Set **Status** to “Active.”
 - d. Set **Website** to “Main Website.” (Click to make sure the entry is selected.)
 - 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. In the panel on the left, choose **Actions**. Then under **Pricing Structure Rules**, do the following:
 - a. Set **Apply** to “Percent of product price discount.”
 - b. Set **Apply to Shipping Amount** to “Yes.”
 - c. Set **Free Shipping** to “For shipment with matching items.”

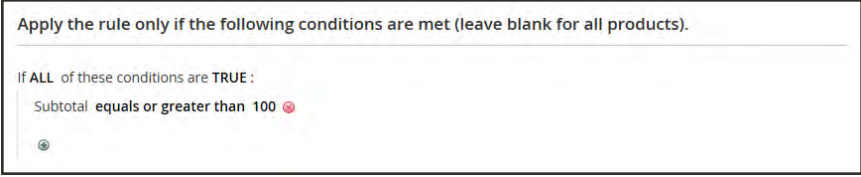
The screenshot shows the 'Pricing Structure Rules' configuration panel. The 'Apply' dropdown is set to 'Percent of product price discount'. The 'Discount Amount' is 10. The 'Maximum Qty Discount is Applied To' is 0. The 'Discount Qty Step (Buy X)' is 0. The 'Apply to Shipping Amount' dropdown is set to 'Yes'. The 'Discard subsequent rules' dropdown is set to 'Yes'. The 'Add Reward Points' is 3. The 'Free Shipping' dropdown is set to 'For shipment with matching items'. Callout boxes highlight the 'Apply', 'Apply to Shipping Amount', and 'Free Shipping' settings.

Price Rule Action

3. In the panel on the left, choose **Labels**. Then, do one of the following:
 - Enter a **Default Rule Label for All Store Views**. This label is visible to the customer.
 - If your store is available in multiple stores, enter **Store View Specific Labels** for each view.
4. When complete, tap **Save Rule**.

Example 2: Free Shipping for Orders Over \$Amount

1. Complete the **General Information** settings as described in the previous example.
2. In the panel on the left, choose **Conditions**.
3. Tap **Add**  to insert a condition. Then, do the following:
 - a. In the list under **Cart Attribute**, choose **Subtotal**.
 - b. Click the underlined **is** link, and choose “equals or greater than.”
 - c. Click the **...** “more” link, and enter a threshold value for the Subtotal, such as 100, to complete the condition.



Apply the rule only if the following conditions are met (leave blank for all products).

If ALL of these conditions are TRUE:

Subtotal equals or greater than 100

Condition

4. In the panel on the left, select **Actions**. Then, do the following:
 - a. Set **Apply** to “Percent of product price discount.”
 - b. Set **Apply to Shipping Amount** to “Yes.”
 - c. Set **Free Shipping** to “For shipment with matching items.”
5. In the panel on the left, select **Labels**. Then, do one of the following:
 - Enter a **Default Rule Label for All Store Views**. The label is visible to the customer during checkout.
 - If your store is available in multiple views, enter a label for each view, as needed.
6. When complete, tap **Save Rule**.

Step 3: Test the Rule

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

Buy X Get Y Free

This example shows how to set up a **cart price rule** for a “Buy X, Get Y Free” promotion. The format of the discount is as follows:

```
Buy X quantity of product, get Y quantity for free.
```

Process Overview:

Step 1: [Create a Cart Price Rule](#)

Step 2: [Define the Conditions](#)

Step 3: [Define the Actions](#)

Step 4: [Complete the Label](#)

Step 5: [Apply the Rule](#)

Step 1: Create a Cart Price Rule

Complete **Step 1** of the cart price rule instructions to complete the general information.

Step 2: Define the Conditions

Complete **Step 2** of the shopping cart instructions to define the conditions for the price rule. The conditions can be triggered by purchasing a specific product, making a purchase of a certain amount, or any other scenario.

Step 3: Define the Actions

1. In the panel on the left, choose **Actions**. Then, do the following:
 - a. Set **Apply** to “Buy X get Y free (discount amount is Y).”
 - b. Set **Discount Amount** to 1. This is the quantity the customer will receive for free.
 - c. To limit the number of discounts that can be applied when the condition is met, enter the number in the **Maximum Qty Discount is Applied To** field. For example, enter “1” to discount only one item.
 - d. In the **Discount Qty Step (Buy X)** field, enter the quantity that the customer must purchase to qualify for the discount.

Pricing Structure Rules

Apply: Buy X get Y free (discount amount is Y) ▼

Discount Amount *

Maximum Qty Discount is Applied To

Discount Qty Step (Buy X)

Apply to Shipping Amount: No ▼

Discard subsequent rules: Yes ▼

Add Reward Points

Free Shipping: No ▼

Buy X Get Y Free

2. Tap **Save and Continue Edit**. Then, complete the rest of the rule as needed.

Step 4: Complete the Label

Complete **Step 4** of the cart price rule instructions to enter the label that appears during checkout.

Step 5: Apply and Test the Rule

When complete, tap **Save Rule**.

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

Discount with Minimum Purchase

Cart price rules can be used to offer a percentage discount based on a minimum purchase. In the following example, a 25% discount is applied to all purchases over \$200.00 in a specific category. The format of the discount is as follows:

```
X% off all Y (category) over $Z dollars
```

Process Overview:

Step 1: [Create a Shopping Cart Rule](#)



Step 2: [Define the Conditions](#)

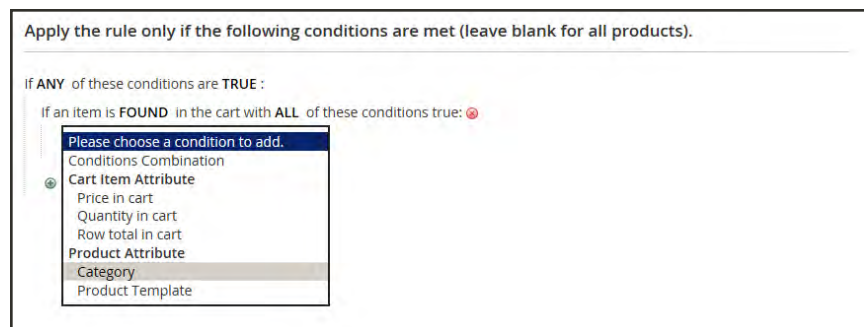
Step 3: [Define the Actions](#)

Step 1: Create a Shopping Cart Rule

Follow the basic [instructions](#) to create a cart rule.

Step 2: Define the Conditions

1. In the panel on the left, choose **Conditions**.
2. Tap **Add**  at the beginning of the next line, and choose **Product Attribute Combination**.
3. Tap **Add**  at the beginning of the next line. Then in the list under Product Attribute, choose **Category**.



Choose Condition to Add

- a. Click the **...** “more” link to display additional options.

Apply the rule only if the following conditions are met (leave blank for all products).

If ANY of these conditions are TRUE :

If an item is **FOUND** in the cart with **ALL** of these conditions true:

Category is ...

Category IS

- b. Tap the **Chooser** button to display the available categories. In the category tree, mark the checkbox of each category that you want to include. Then, press **Enter** to add the categories to the condition.

Apply the rule only if the following conditions are met (leave blank for all products).

If ANY of these conditions are TRUE :

If an item is **FOUND** in the cart with **ALL** of these conditions true:

Category is

Category Tree

4. Tap **Add** at the beginning of the next line, and do the following:
- In the list under Cart Item Attribute, choose **Price in cart**.
 - Click the first underlined parameter, IS. Then in the list, choose “equals or greater than.”
 - Click the ... “more” link and enter the amount that the Price in Cart must be to meet the condition. For example, enter 200.00.

Apply the rule only if the following conditions are met (leave blank for all products).

If ANY of these conditions are TRUE :

If an item is **FOUND** in the cart with **ALL** of these conditions true:

Category is 3

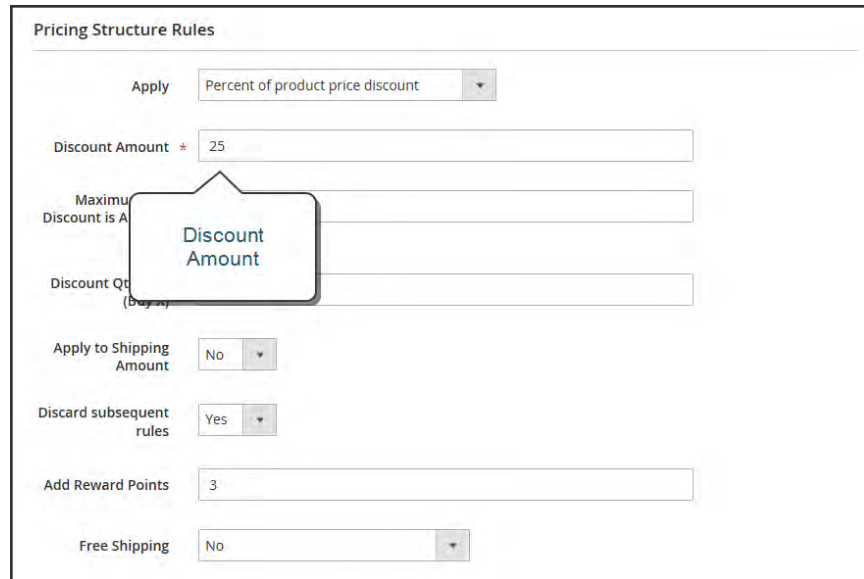
Price in cart equals or greater than 200

Enter the Price to Complete the Condition

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

Step 3: Define the Actions

- In the panel on the left, choose **Actions**. Then, do the following:



The screenshot shows the 'Pricing Structure Rules' configuration interface. The 'Apply' dropdown is set to 'Percent of product price discount'. The 'Discount Amount' field is set to '25'. A callout box labeled 'Discount Amount' points to this field. Other fields include 'Maximum Discount is A', 'Discount QTY (By Qty)', 'Apply to Shipping Amount' (No), 'Discard subsequent rules' (Yes), 'Add Reward Points' (3), and 'Free Shipping' (No).

Actions

- Set **Apply** to “Percent of product price discount.”
 - Enter the **Discount Amount**. For example, enter 25 for a twenty-five percent discount.
 - If you want to prevent the purchase from qualifying for additional promotions, set **Stop Further Rules Processing** to “Yes.”
- Tap **Save and Continue Edit**. Then, complete the rule as needed.

Communications

One of the tasks to complete before launching your store is to review the email templates that are used for all communications sent from your store to make sure that they reflect your brand. In this section of the guide, you will learn how to customize email and newsletter templates, as well as PDF invoices and packing slips. You will also learn how to personalize the content with variables and markup tags.

Contents

- Email Templates
 - Supported Email Clients
 - Preparing Your Email Logo
 - Configuring Email Templates
 - Sales Emails
 - Payment Failed Emails
 - Customizing Email Templates
 - Header Template
 - Footer Template
 - Message Template
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 - Preparing Your Invoice Logo
 - Adding Reference IDs to Header
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 - Sending Newsletters
 - Managing Subscribers
- RSS Feeds
- Using Variables
 - Adding Predefined Variables
 - Adding Custom Variables
 - Markup Tags
 - Using Markup Tags in Links
 - Variable Reference



CHAPTER 20:

Email Templates

Email templates define the layout, content, and formatting of automated messages sent from your store. They are called **transactional emails**¹ because each one is associated with a specific type of transaction, or event.

Magento includes a set of responsive email templates that are triggered by a variety of events that take place during the operation of your store. Each template is optimized for any screen size, and can be viewed from the desktop, as well as on tablets and smartphones. You will find a variety of prepared email templates related to customer activities, sales, product alerts, admin actions, and system messages that you can customize to reflect your brand.

¹An 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 Community Edition 2.0.

Desktop Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
OS X 10.8	Apple Mail 6
OS X 10.7	Outlook 2011 Outlook 2013
Windows 8	Outlook 2010
Windows 7	Outlook 2007 Outlook 2003

Mobile Clients

OPERATING SYSTEM	CLIENTS SUPPORTED
Android 4.2, "Jelly Bean"	Native email app
Android 2.3, "Gingerbread"	Native email app
Gmail App (Android 4.2)	Native email app
Blackberry 5 OS	Native email app
IOS 8	iPhone 6 iPhone 6 Plus
IOS 7	iPad (Retina) iPad Mini iPhone 5s
	Mail on these devices:
IOS 6	iPhone 5 iPhone 4s

Web Clients

EMAIL APPLICATION	BROWSERS SUPPORTED*
AOL Mail	Chrome Internet Explorer Firefox
Gmail	Chrome Internet Explorer Firefox
Yahoo! Mail	Chrome Internet Explorer Firefox
Outlook.com	Chrome Internet Explorer

* The latest version of each browser was used for testing.

Preparing Your Email Logo

Logos can be saved as any of the following file types. Logos with transparent backgrounds can be saved as either .gif or .png files.

- jpg / jpeg
- gif
- png

To ensure that your logo renders well on high-resolution devices, the uploaded image should be three times the size of the dimensions that are specified in the header template. Typically, original logo artwork is created as a vector image, so it can be scaled up without losing resolution. The image can then be saved in one of the supported bitmap image formats.



Logo 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

¹The proportional relationship between the width and height of an image.

Configuring Email Templates

The configuration determines the logo, as well as the header and footer templates that are used for all email messages sent from your store.

Emails

Logo Image No file chosen [STORE VIEW]
Allowed file types: jpg, jpeg, gif, png. To optimize logo for high-resolution displays, upload an image that is 3x normal size and then specify 1x dimensions in width/height fields below.

Logo Image Alt [STORE VIEW]

Logo Width [STORE VIEW]
Only necessary if image has been uploaded above. Enter number of pixels, without appending "px".

Logo Height [STORE VIEW]
Only necessary if image has been uploaded above. Enter number of pixels, without appending "px".

Header Template [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.

Footer Template [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.


Emails

Process Overview:

Step 1: **Upload Your Logo**

Step 2: **Select the Header and Footer Templates**

Step 1: Upload Your Logo

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand  the **Emails** section. Then, do the following:
 - a. To upload your prepared **Logo Image**, tap **Browse**. Find the file on your computer, and select the file.
 - b. In the **Logo Image Alt** field, enter alternate text to identify the image.
 - c. Enter the **Logo Width** and **Logo Height** in pixels. Enter each value as a number, without the “px” abbreviation. These values refer to the display dimensions of the logo in the header, and not to the actual size of the image.

Step 2: Choose the Header and Footer Templates

If you have custom header and footer templates for your store, or for different stores, you can specify which templates are used for each, according to the **scope** of the configuration.

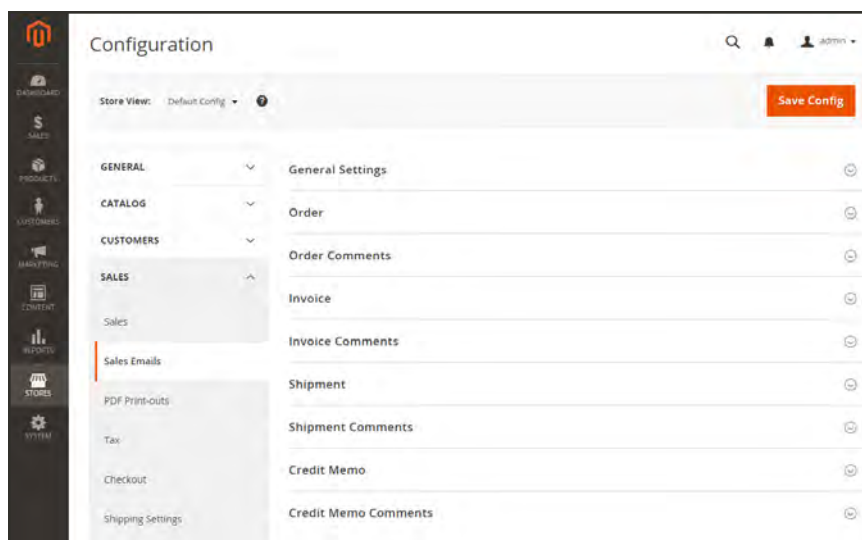
1. Choose the **Header Template** to be used for all transactional email messages.
2. Choose the **Footer Template** to be used for all transactional email messages.
3. When complete, tap **Save Config**.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Logo Image	Store View	<p>Identifies the logo file that appears in the header of transactional email messages. To support high-resolution displays, it is recommended that you upload an image that is three times the display dimensions. For example, if the actual display dimensions of the logo are 100 pixels high and 200 pixels wide, you should upload an image that is 300 pixels high and 600 pixels wide.</p> <p>To delete the current image and upload another, select the Delete Image checkbox. Then, browse to select the new image. Allowed file types:</p> <p>.jpg / .jpeg .gif .png</p>
Logo Image Alt	Store View	Enter alternative text that appears if the logo image is not available.
Logo Width	Store View	Enter the display width of the image in pixels, as a number. Do not include the “px” abbreviation. It is important to specify both width and height to preserve the aspect ratio when the image is rendered at different sizes.
Logo Height	Store View	Enter the display height of the image in pixels, as a number. Do not include the “px” abbreviation. It is important to specify both width and height to preserve the aspect ratio when the image is rendered at different sizes.
Header Template	Store View	Select the template to be used for the header of all transactional email messages.
Footer Template	Store View	Select the template to be used for the footer of all transactional email messages.

Configuring 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

Step 1: Update the Email Templates

Make sure that you have updated each [email template](#) to reflect your brand. For a complete list of templates, see: [Email Template List](#).

Step 2: Configure the Sales Emails

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Sales Emails**.
3. Expand ☾ the **Order** section. Then, do the following:

Order

Enabled Yes [STORE VIEW]

New Order Confirmation Email Sender Sales Representative [STORE VIEW]

New Order Confirmation Template New Order (Default) [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.

New Order Confirmation Template for Guest New Order for Guest (Default) [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.

Send Order Email Copy To [STORE VIEW]
Comma-separated

Send Order Email Copy Method Bcc [STORE VIEW]

Order

- a. Verify that **Enabled** is set to “Yes.”
 - b. Set **New Order Confirmation Email** to the store contact that appears as the sender of the message.
 - c. Set **New Order Confirmation Template** to the template that is used for the email that is sent to registered customers.
 - d. Set **New Order Confirmation Template for Guest** to the template that is used for the email that is sent to guests who do not have an account with your store.
 - e. In the **Send Order Email Copy To** field, enter the email address of anyone who is to receive a copy of the new order email. If sending a copy to multiple recipients, separate each address with a comma.
 - f. Set **Send Order Email Copy Method** to one of the following:

Bcc	Sends a “blind courtesy copy” by including the recipient in the header of the same email that is sent to the customer. The BCC recipient is not visible to the customer.
Separate Email	Sends the copy as a separate email.
4. Expand ☺ the **Order Comments** section, and repeat these steps.

Order Comments

Enabled Yes [STORE VIEW]

Order Comment Email Sender Sales Representative [STORE VIEW]

Order Comment Email Template Order Update (Default) [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.

Order Comment Email Template for Guest Order Update for Guest (Default) [STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.

Send Order Comment Email Copy To [STORE VIEW]
Comma-separated

Send Order Comments Email Copy Method Bcc [STORE VIEW]

Order Comments

5. Complete the configuration for the remaining sales emails:
 - Invoice
 - Shipment
 - Credit Memo
6. 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		[STORE VIEW]
Payment Failed Email Receiver	General Contact	[STORE VIEW]
Payment Failed Email Sender	General Contact	[STORE VIEW]
Payment Failed Template	Payment Failed (Default)	[STORE VIEW]
Email template chosen based on theme fallback when "Default" option is selected.		
Send Payment Failed Email Copy To		[STORE VIEW]
Separate by ",".		
Send Payment Failed Email Copy Method	Bcc	[STORE VIEW]

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 Receiver** to
 - b. Set **Payment Failed Email Sender** to the store contact that appears as the sender of the message.
 - 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.

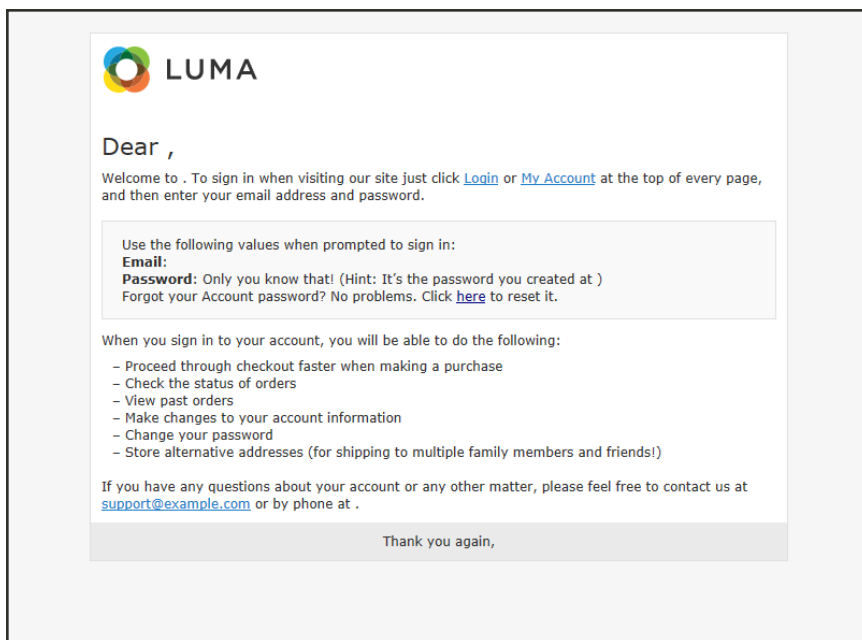
- e. Send **Payment Failed Copy Method** to one of the following:

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**.

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.

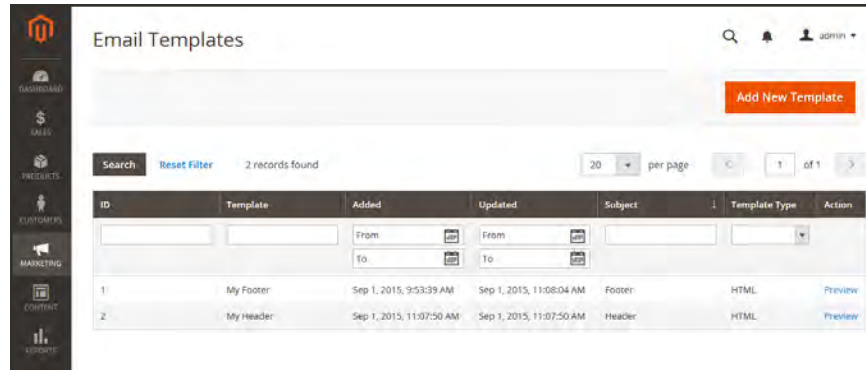
The default templates include your logo and store information, and can be used without further customization. However as a best practice, you should view each template, and make any necessary changes before they are sent to customers.



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 the Template](#)
- Step 3: [Preview the Template](#)
- Step 4: [Update the Configuration](#)

Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under Communications, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
 - a. In the **Template** list under Magento_Email, choose “Header.”
 - b. Tap **Load Template**.



Default Header Template

Step 2: Complete the Template Information

1. In the **Template Name** field, enter a name for your custom header.
2. Enter a **Template Subject** to help organize the templates. The list of templates can be sorted and filtered by the Subject column.

Template Information

Currently Used For Stores -> Configuration -> Design -> Emails -> Header Template (Default Config)

Template Name *

Template Subject * Header

Header Template Information

Step 3: Customize the Template Content

1. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

Insert Variable...

Template Content *

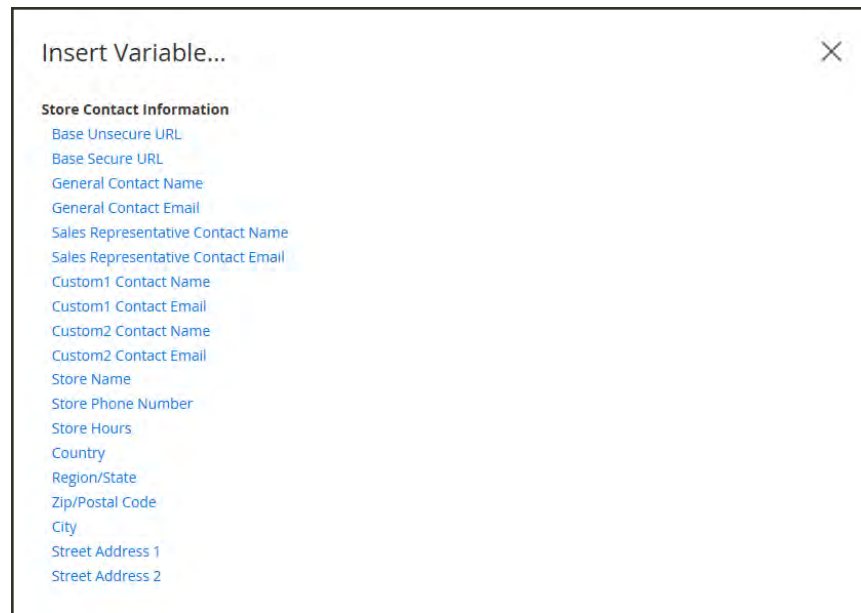
```
<!DOCTYPE html
PUBLIC "-//W3C/
/DTD XHTML 1.0
Strict//EN" "http:
//www.w3.org/T
R/xhtml1/DTD/x
html1-
strict.dtd">
<html
xmlns="http://w
ww.w3.org/1999
/xhtml">
<head>
<meta http-
equiv="Content-
Type"
content="text/ht
...>
```

Template Styles

Template Content

2. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.




Insert Variable

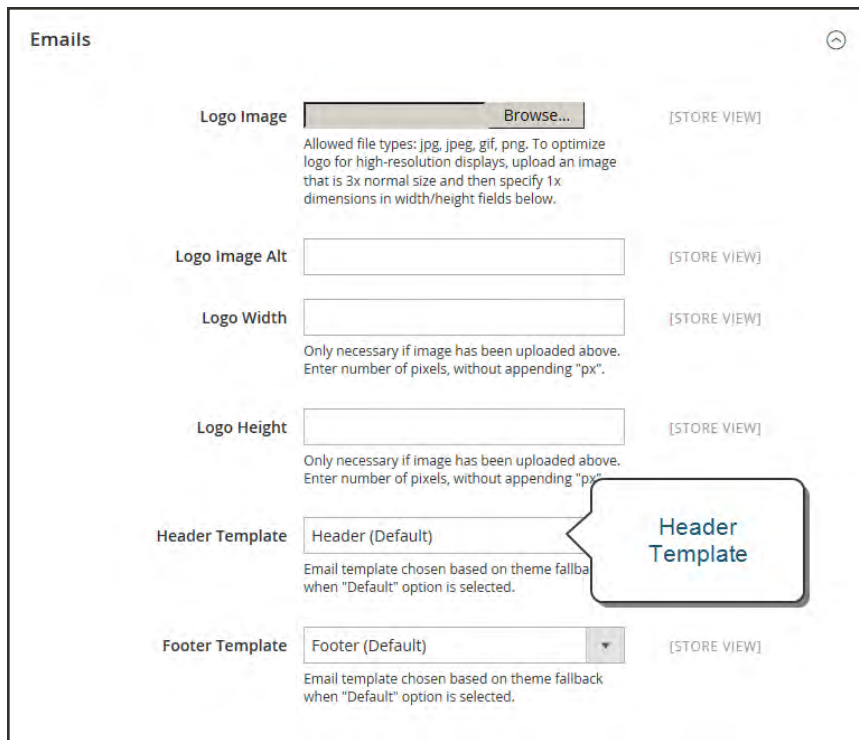
Although the Store Contact variables are the ones most often included in the header, you are not limited to the variables in this list. You can enter the code for any system or **custom variable** directly into the template.

3. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
4. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
5. When complete, tap **Save Template**.

Your custom header now appears in the list of available Email templates.

Step 4: Update the Configuration

1. In the list, tap the new header to reopen the template in edit mode.
2. Tap the last link in the breadcrumb trail at the top of the Template Information section. Then, expand  the **Emails** section.
3. Set **Header Template** to the name of the new header template.
4. When complete, tap **Save Config**.



Header Template Configuration

Field Descriptions

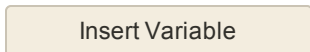
FIELD	DESCRIPTION
-------	-------------

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.
---------------	-----------------------------------



Inserts a Store Contact Information variable into the template at the cursor location.

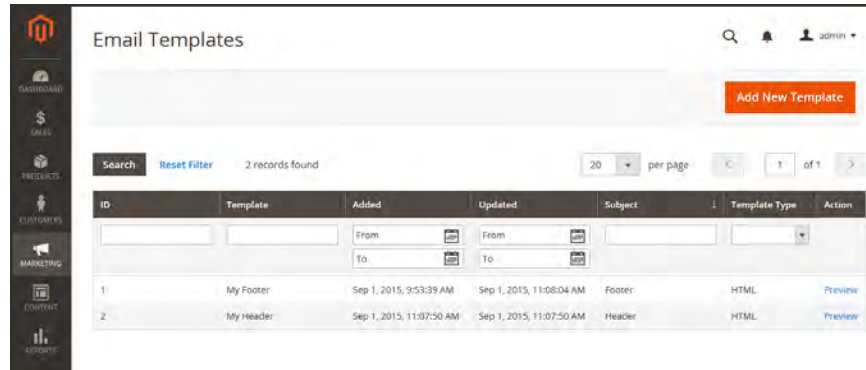
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
------------------	---

Template Content	The content of the template in HTML.
------------------	--------------------------------------

Template Styles	Any CSS style declarations that are needed to format the template header can be entered in the Template Styles box.
-----------------	---

Footer Template

The email template footer contains the closing and signature line of the email message. You can change the closing to fit your style, and add additional information, such as the company name and address below your name.



Email Templates

Process Overview:

- Step 1: **Load the Template**
- Step 2: **Customize the Template**
- Step 3: **Preview the Template**
- Step 4: **Update the Configuration**

Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under Communications, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
 - a. In the **Template** list under Magento_Email, choose “Footer.”
 - b. Tap **Load Template**.



Default Footer Template

Step 2: Complete the Template Information

1. In the **Template Name** field, enter a name for your custom footer.
2. Enter a **Template Subject** to help organize the templates. The list of templates can be sorted and filtered by the Subject column.

Template Information

Currently Used For Stores -> Configuration -> Design -> Emails -> Footer Template. (Default Config)

Template Name *

Template Subject * Footer

Footer Template Information

Step 3: Customize the Template Content

1. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

Insert Variable...

Template Content * <!-- End Content -->

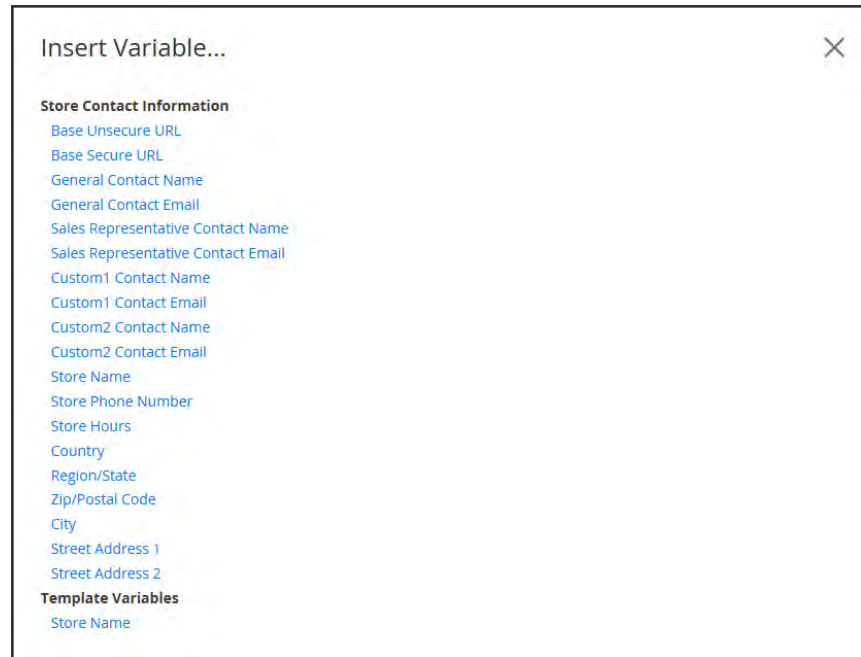
```
</td>
</tr>
<tr>
<td
class="footer">
<p
class="closing">
{{trans "Thank
you, %
store_name"
store_name=$store.getFrontend
Name}}</p>
</td>
</tr>
</table>
```

Template Styles

Template Footer Content

2. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.




Insert Variable

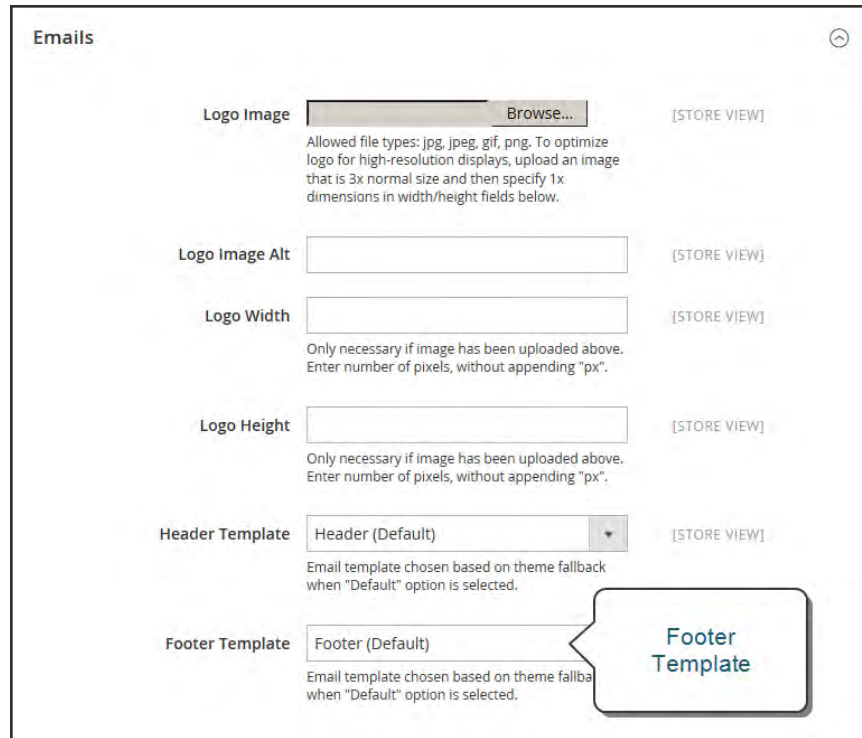
Although the Store Contact variables are the ones most often included in the footer, you are not limited to the variables in this list. You can enter the code for any system or **custom variable** directly into the template.

3. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
4. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
5. When complete, tap **Save Template**.

Your custom footer now appears in the list of available Email templates.

Step 4: Update the Configuration

1. In the list, tap the new footer to reopen the template in edit mode.
2. Tap the last link in the breadcrumb trail at the top of the Template Information section. Then, expand  the **Emails** section.
3. Set **Footer Template** to the name of the new template.
4. When complete, tap **Save Config**.



Footer Template Configuration

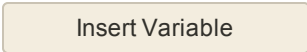
Field Descriptions

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.
	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

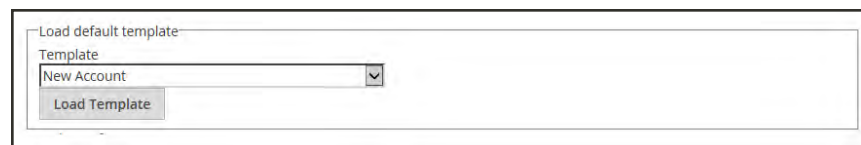
The process of customizing the body of each message is the same as the customizing the header or footer. The only difference is that a different template is used for each activity or event. You can use the templates as they are, or customize them to match your voice and brand. You might start with the most important messages, such as those related to customer accounts and activities. The selection of variables varies by template. In addition to the standard Store Contact Information, some templates have additional variables available. For a complete list, see the [Email Template List](#) at the end of this section.

Process Overview:

- Step 1: [Load the Template](#)
- Step 2: [Customize the Template](#)
- Step 3: [Preview the Template](#)
- Step 4: [Update the Configuration](#)

Step 1: Load the Default Template

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Tap **Add New Template**. Then, do the following:
 - a. In the **Template** list, choose the message template that you want to customize.
 - b. Tap **Load Template**.



Default Message Template

Step 2: Complete the Template Information

1. In the **Template Name** field, enter a name for your custom footer.
2. By default, the **Template Subject** contains the first line of the message, which is the salutation. You can leave it as is, or enter something more descriptive. Because the Template Subject can be used to sort the list, try to choose a word or phrase that applies to multiple messages. For ideas, see the [Email Template List](#) at the end of this section.

Template Information

Currently Used For Stores -> Configuration -> Customer Configuration -> Create New Account Options -> Default Welcome Email (Default Config)

Template Name * New Account

Template Subject * Welcome to {{var store.getFrontendName()}}

Message Template Information

Step 3: Customize the Template Content

1. In the **Template Content** box, modify the HTML as needed.

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

Insert Variable...

Template Content * `{{template config_path="design/email/header_template"}}`

`<p class="greeting">{{trans "%name," name=$customer.name}}</p>`

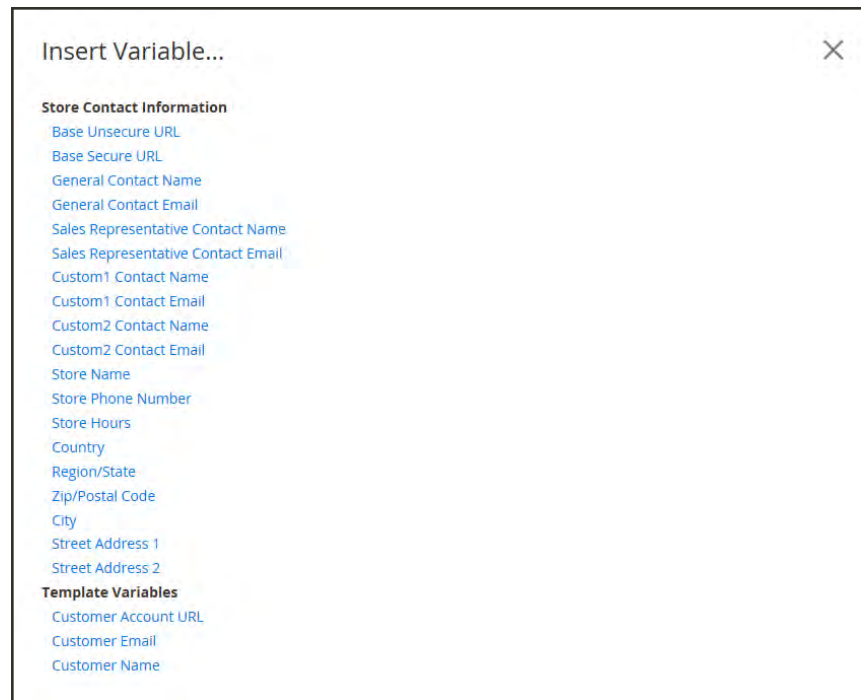
`<p>{{trans "Welcome to %store_name," store_name=$store.getFrontendName()}}`

Template Styles

Template Message Content

2. To insert a variable, position the cursor in the code where you want the variable to appear, and tap **Insert Variable**. Then, choose the variable that you want to insert.

When a variable is selected, a **markup tag** for the variable is inserted in the code.



Insert Variable

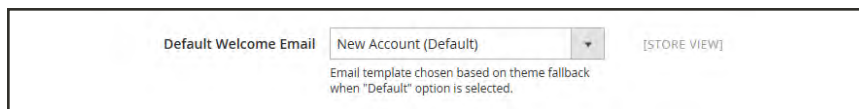
In addition to the Store Contact variables, the list includes the Customer Account URL, Customer Email, and Customer Name. However, you are not limited to the variables in this list. You can enter the code for any system or **custom variable** directly into the template.

3. If you need to make any CSS declarations, enter the styles in the **Template Styles** box.
4. When you are ready to review your work, tap **Preview Template**. Then, make adjustments to the template as needed.
5. When complete, tap **Save Template**.

Your custom footer now appears in the list of available Email templates.

Step 4: Update the Configuration

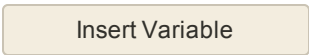
1. In the list, tap the new message template to reopen it in edit mode.
2. In the breadcrumb trail at the top of the Template Information section, take note of the section after the last link. Tap the link to open the configuration page.
3. Expand ☺ the section. For this example, the template is located in the **Create New Account Options** section.
4. Find the email template field in the form, and choose the new template that you created.



Welcome Email Configuration

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

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEMPLATE	
Template	Lists the selection of available templates, and identifies the template to be customized.
TEMPLATE INFORMATION	
Template Name	The name of your custom template.
	Inserts a variable into the template at the cursor location.
Template Subject	The Template Subject appears in the Subject column, and can be used to sort and filter the templates in the list.
Template Content	The content of the template in HTML.
Template Styles	Any CSS style declarations that are needed to format the template can be entered in the Template Styles box.

Email Template List

Email Templates

Customer Account

- New Account
- New Account Confirmation Key
- New Account Confirmed
- New Account Without Password
- Forgot Password
- Remind Password
- Reset Password

Customer Activity

- Contact Form
- Send Product Link to Friend
- Wishlist Sharing

Newsletters

- Subscription Confirmation
- Subscription Success
- Unsubscription Success

Product Alert

- Cron Error Warning
- Price Alert
- Stock Alert

Promotions

- Promotion Notification / Reminder

Admin Activity

- Forgot Admin Password
- Reset Password

Email Templates

- Email - Footer
- Email - Header
- Export Failed
- Import Failed

Product Alerts

- Product Alerts Cron Error
- Product Price Alert
- Product Stock Alert

Order

- New Order / New Order for Guest
- Order Update / Order Update for Guest
- Payment Failed

Invoice

- New Invoice / New Invoice for Guest
- Invoice Update / Invoice Update for Guest

Shipment

- New Shipment / New Shipment for Guest
- Shipment Update / Shipment Update for Guest

Credit Memo

- Credit Memo Update
- Credit Memo Update for Guest
- New Credit Memo
- New Credit Memo for Guest

System Notifications

- Sitemap Generate Warnings
- Currency Update Warnings



CHAPTER 21:

Sales Documents

In addition to the email messages related to a sale, your store generates invoices, packing slips, and credit memos in both HTML and PDF formats. Before your store goes live, make sure to update these documents with your logo and store address. You can customize the address format, and also include additional information for reference.

- Invoices
- Packing Slips
- Credit Memos

Preparing Your Invoice Logo

Unlike the logo images used in HTML, the logo for PDF invoices and other sales documents can be a high-resolution, 300 dpi image. However, the image must be rendered to fit a space that is 200 pixels wide by 50 pixels high. Be careful to preserve the aspect ratio when you resize the logo. Resize the logo to fit the height, and don't worry about any unused space to the right.

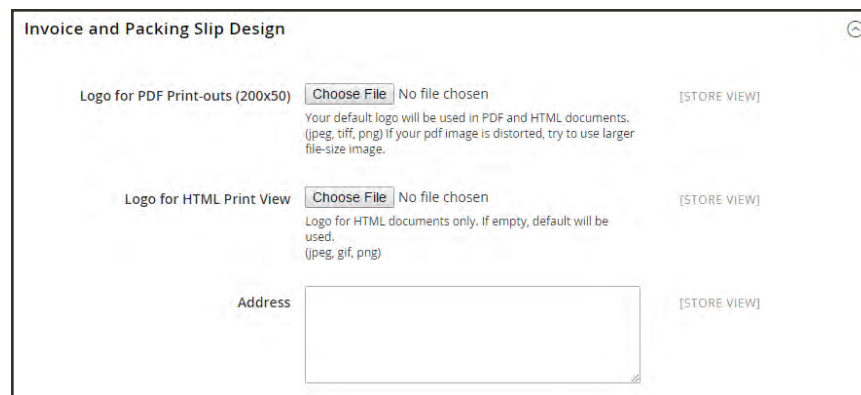


200 x 50 pixels

One way to resize your logo to fit the required size is to create a new, blank image with the correct dimensions. Then, paste your logo image and resize it to fit the height. With most image editing programs, you can either scale it by a percentage to preserve the aspect ratio, or hold down the shift key and manually resize the image.

To configure invoices and packing slips:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**. Then in the panel on the left, under **Sales**, choose **Sales**.
2. 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**.

3. Enter your address as you want it to appear on invoices and packing slips.
4. 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:

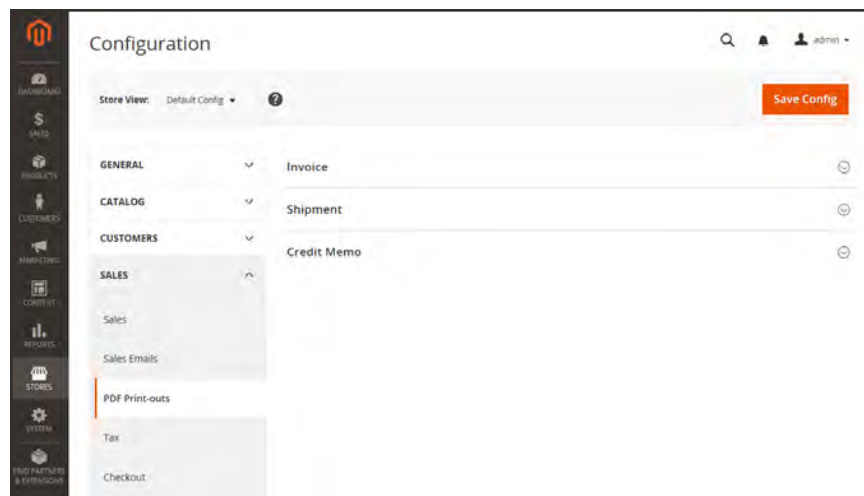
1. Tap **Choose File** and choose a different logo file.
2. Mark the **Delete Image** checkbox for the image you want to replace.
3. Tap **Save Config**.

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. Follow the instructions below to include either, or both of these identifiers for reference in the header of invoices, shipment packing slips, and credit memos.



PDF Print-outs

To show the Order ID:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **PDF Print-outs**.
3. Expand ☾ the **Invoice** section.

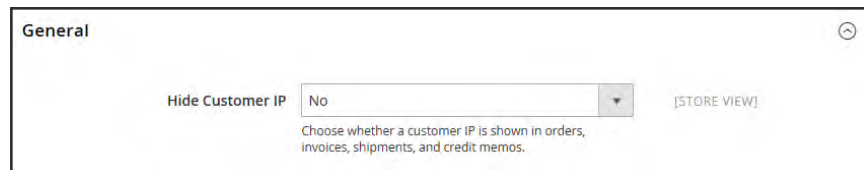


Invoice

4. Set **Display Order ID in Header** to “Yes.”
5. Repeat these steps for the **Shipment** and **Credit Memo** sections.
6. When complete, tap **Save Config**.

To show the customer IP address:

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



General

Hide Customer IP No [STORE VIEW]

Choose whether a customer IP is shown in orders, invoices, shipments, and credit memos.

General

4. Set **Hide Customer IP** to “No.”
5. When complete, tap **Save Config**.

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.

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}}

```

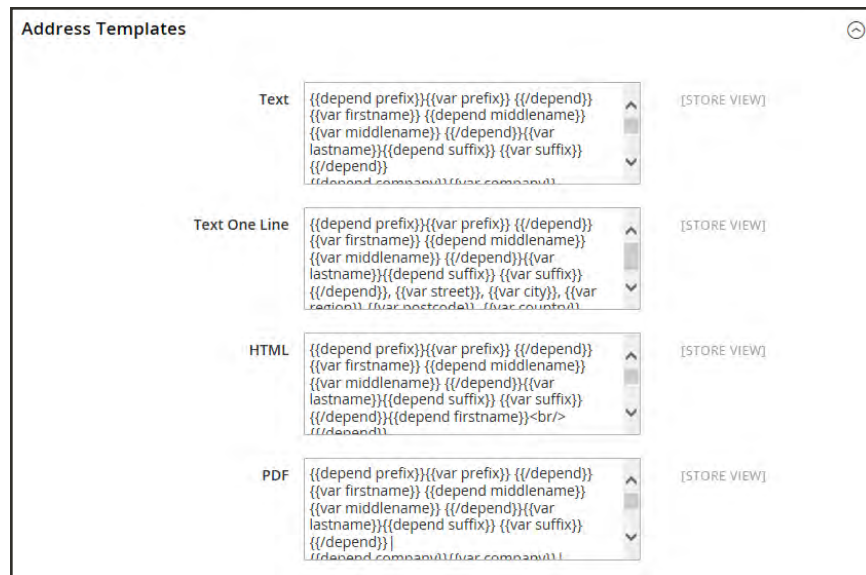
Example 2: JavaScript Template

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 22:

Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Community Edition 2.0 gives you the ability to publish and distribute newsletters to customers who have subscribed, plus tools to produce your newsletter, build and manage your list of subscribers, develop content, and drive traffic to your store. You can also use [Page Hierarchy](#) to create an archive of past issues.

You can add capabilities by integrating your Magento installation with a third-party newsletter service provider and by adding extensions. To learn more, see [Magento Connect](#).

Configuring Newsletters

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. Expand ☺ the **Subscription Options** section. Then, do the following:

Subscription Options		[STORE VIEW]
Success Email Template	Subscription Success (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
Unsubscription Email Sender	Customer Support	[STORE VIEW]
Unsubscription Email Template	Unsubscription Success (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
Success Email Sender	General Contact	[STORE VIEW]
Confirmation Email Template	Subscription Confirmation (Default)	[STORE VIEW]
<small>Email template chosen based on theme fallback when "Default" option is selected.</small>		
Need to Confirm	No	[STORE VIEW]
Confirmation Email Sender	Customer Support	[STORE VIEW]
Allow Guest Subscription	Yes	[STORE VIEW]

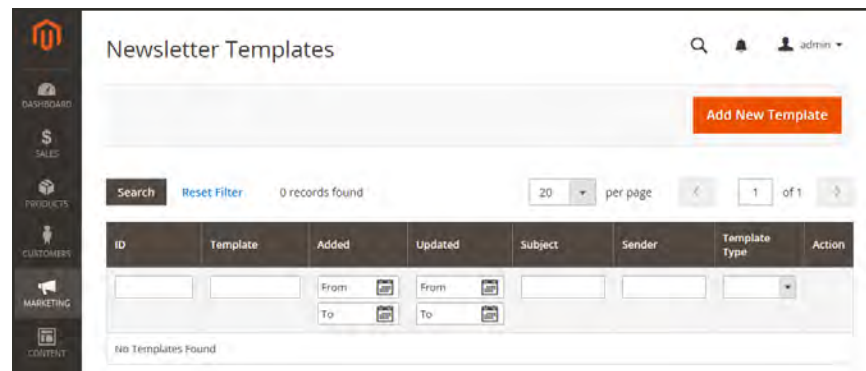
Subscription Options

¹The 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
 - Unsubscription email
 - b. To require the use of double-opt in to confirm subscriptions, set **Need to Confirm** to “Yes.”
 - c. To allow people who do not have an account with your store to subscribe to the newsletter, set **Allow Guest Subscriptions** to “Yes.”
4. When complete, tap **Save Config.**

Newsletter Templates

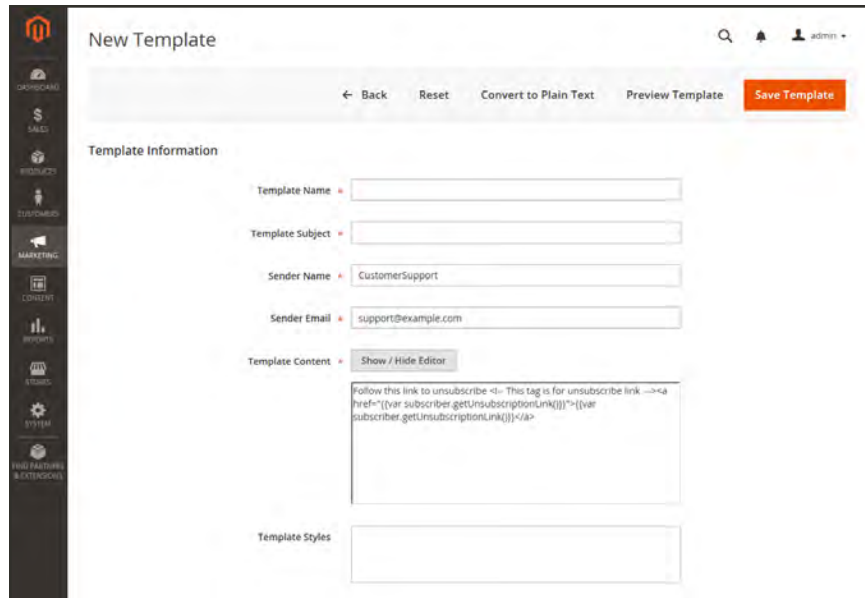
You can create as many newsletter templates as you need for different purposes. You might send a weekly product update, a monthly newsletter, or annual holiday newsletter.



Newsletter Templates

To create a newsletter template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Newsletter Template**.
2. To add a new template, click the **Add New Template** button. Then, do the following:
 - a. In the **Template Name** enter name for internal reference.
 - b. In the **Template Subject** field, describe the purpose of the newsletter.
 - c. In the **Sender Name** field , enter the name of the person who is to appear as the sender of the newsletter.
 - d. In the **Sender Email** field, enter the email address of the newsletter sender.
 - e. At the **Template Content** field, tap **Show / Hide Editor** to display the WYSIWYG editor. Then, update the content as needed. To learn more, see: [Using the Editor](#).



Template Information

Do not remove the unsubscribe link at the bottom of the template content. In some jurisdictions, the link is required by law.

- f. In the **Template Styles** field, enter any CSS declarations that are needed to format the content.
- g. Tap **Preview Template** to see how it looks. Then, make any changes that are needed.
- 3. When complete, tap **Save Template**.

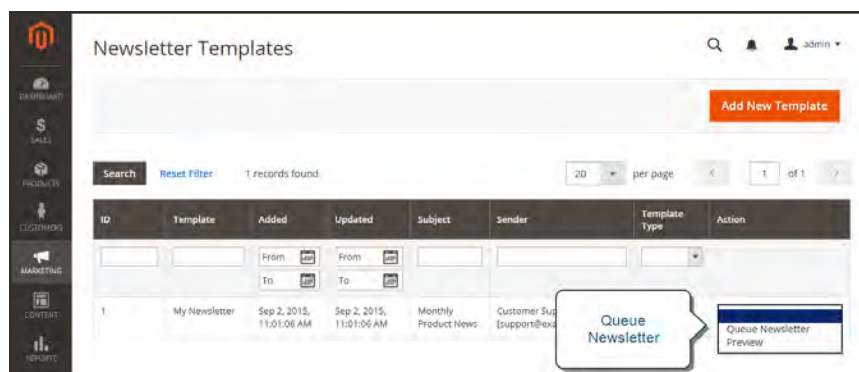
After you save a template, a **Save As** button appears the next time you edit the template. It can be used to save variations of the template without overwriting the original.

Sending Newsletters


To manage the load on the server, newsletters with many subscribers are sent in batches. The process is managed as a queue of separate batches. Any problems that occur during the transmission appear on the Newsletter Problem Report.

To send a newsletter:

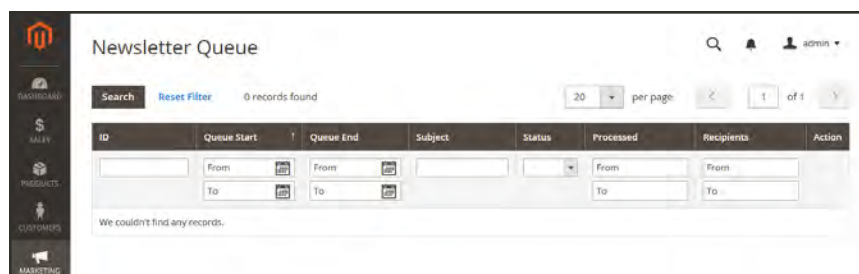
1. Find the newsletter to be sent in the Newsletter Templates list. Then, set the **Action** column to “Queue Newsletter.”



Add to Newsletter Queue

2. On the Admin menu, tap **Marketing**. Then under **Communications**, choose **Newsletter Queue**.
3. Both the **Queue Start** and **Queue End** dates can be defined as a range. Use the **Calendar**  to select the date for each. The value in the date field reflects the system date and time.

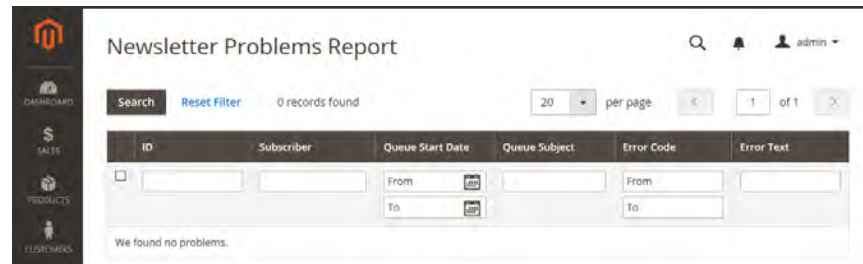
Magento manages sending the newsletters in batches, according to the start and end dates. You can check the newsletter queue periodically to check the status and see how many have been processed.



Newsletter Queue

To check for problems:

1. On the Admin menu, tap **Reports**.
2. Under **Marketing**, choose **Newsletter Problem Reports**.



Newsletter Problems Report

Managing Subscribers

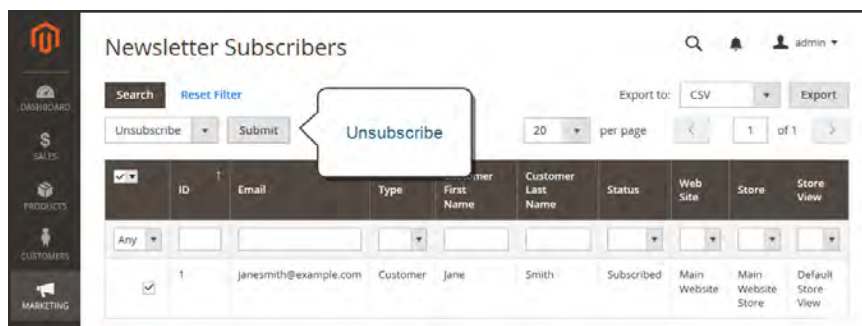
As a best practice you should manage your subscription list on a regular basis, and make sure to process any requests to unsubscribe. In some jurisdictions, it is required by law that requests to unsubscribe are processed within a specific period of time.

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 list. Then, mark the checkbox in the first column.
3. Set the **Action** control to “Unsubscribe.” Then, tap **Submit**.

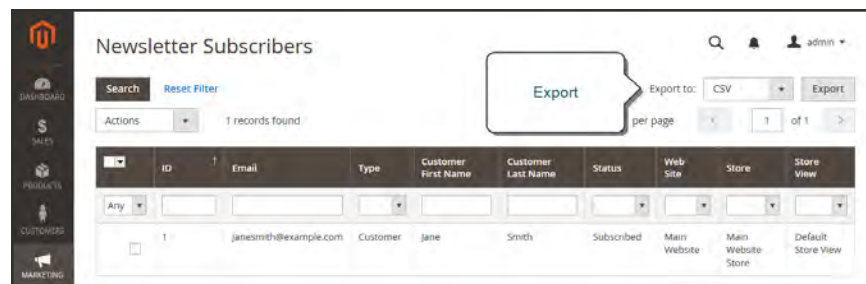
The status of the record changes to “Unsubscribed.”



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 23:**RSS Feeds**

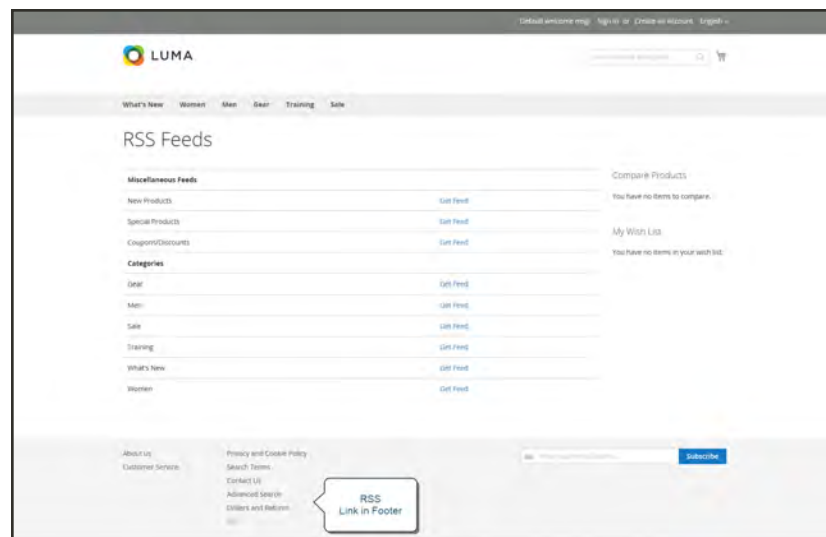
RSS (Really Simple Syndication) is an XML-based data format that is used to distribute information online. Your customers can subscribe to your RSS feeds to learn of new products and promotions. RSS Feeds can also be used to publish your product information to shopping aggregation sites, and can be included 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

¹Software 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 store view where you want the feeds to be available.
3. In the panel on the left, under **Catalog**, choose **RSS Feeds**.
4. Expand ☑ the **Rss Config** section. Then, set **Enable RSS** to “Enable.”

Rss Config

Enable RSS [STORE VIEW]

RSS Feeds

5. Expand ☑ the **Wish List** section. Then, set **Enable RSS** to “Enable.”
6. Expand ☑ the **Catalog** section, set any, or all of the following feeds to “Enable.”
 - New Products
 - Special Products
 - Coupons/Discounts
 - Top Level Category

Catalog

New Products [STORE VIEW]

Special Products [STORE VIEW]

Coupons/Discounts [STORE VIEW]

Top Level Category [STORE VIEW]

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 24:

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.

To add a variable to an email template:

1. On the Admin sidebar, tap **Marketing**. Then under **Communications**, choose **Email Templates**.
2. Do one of the following:
 - Open an existing template.
 - Create a new template.
3. In the **Template Content** box, position the insertion point where you want the variable to appear. Then, tap **Insert Variable**.
4. In the list of available variables, choose the one you want to insert into the template.
5. When complete, tap **Save Template**.

Adding Custom Variables

If you know a little basic HTML, you can create custom variables and use a **markup tag** to incorporate them into pages, blocks, banners, and email templates.

```
{{CustomVar code= "my_custom_variable"}}
```

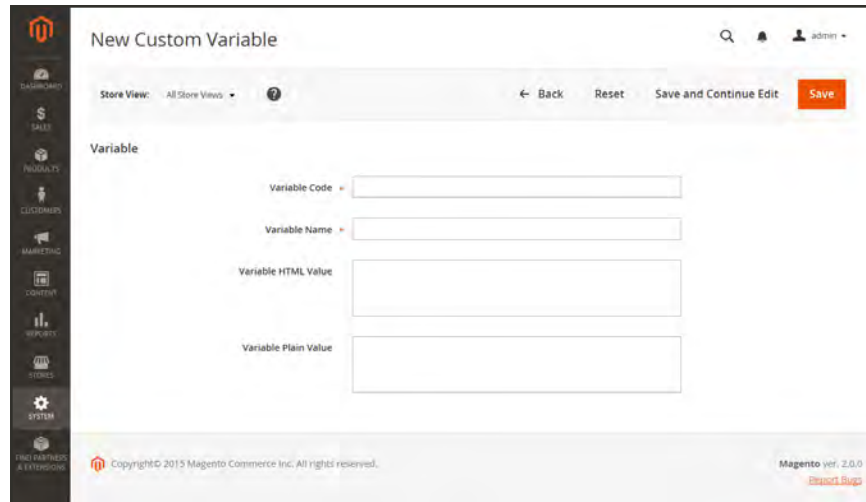


Custom Variables

To create a custom variable:

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Custom Variables**.
2. Tap **Add New Variable**.
3. Enter an identifier in the **Variable Code** field. Use all lowercase characters, without spaces.
4. Enter a **Variable Name**, which is used for internal reference. Then, do one of the following:
 - In the **Variable HTML Value** text field, enter any content you want to include, using basic HTML tags. This option allows you to format the value.
 - In the **Variable Plain Value** field, enter the variable value as plain text.

You can drag the lower-right corner to make the boxes bigger.



The screenshot shows the 'New Custom Variable' form in the Magento admin interface. The form is titled 'New Custom Variable' and is located in the 'System' section of the admin panel. The form contains four input fields: 'Variable Code', 'Variable Name', 'Variable HTML Value', and 'Variable Plain Value'. The 'Store View' is set to 'All Store Views'. The form has a 'Save' button and a 'Save and Continue Edit' button. The footer of the page includes the copyright notice 'Copyright © 2015 Magento Commerce Inc. All rights reserved.' and the version information 'Magento 2.0.0'.

New Custom Variable

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

Markup Tags

A markup tag is a snippet of code that contains a relative reference to an object in your store, such as a variable, URL, image, or block. Markup tags can be incorporated into the HTML of content pages, blocks, email templates, newsletters, and so on.

Markup tags are enclosed in double, curly braces, and can either be generated by the Widget tool, or typed directly into HTML content. For example, rather than hard-coding the full path to a page, you can use a markup tag to represent the store URL. The markup tags featured in the following examples include:

Custom Variable

The Variable markup tag can be used to insert a **custom variable** into an email templates, blocks, newsletters, and content pages,

```
{{CustomVar code= "my_custom_variable"}}
```

Store URL

The Store URL markup tag represents the base URL of your website, and is used as a substitute for the first part of a full URL, including the domain name. There are two versions of this markup tag: One that goes directly to your store, and the other with a forward slash at the end that is used when a path is added.

```
{{store url='apparel/shoes/womens'}}
```

Media URL

The dynamic media URL markup tag represents the location and file name of an image that is stored on a content delivery network (CDN). The tag can be used to place an image on a page, block, banner, or email template.

```
{{media url='shoe-sale.jpg'}}
```

Block ID

The Block ID markup tag is one of the easiest to use, and can be used to place a block directly on a CMS page, or even nested inside another block. You can use this technique to modify a block for different promotions or languages. The Block ID markup tag references a block by its identifier.

```
{{block id='block-id'}}
```

Template Tag

A template tag references a PHTML template file, and can be used to display the block on a CMS page or static block. The code in the following example can be added to a page or block to display the Contact Us form.

“Contact Us” Template Tag

```
{{block type="core/template" name="contactForm"
template="contacts/form.phtml"}}
```

The code in the next example can be added to a page or block to display the a list of products in a specific category, by category ID.

“Category Product List” Template Tag

```
{{block type="catalog/product_list" category_id="22"
template="catalog/product/list.phtml"}}
```

Widget Code

The Widget tool can be used to display lists of products, or to insert complex links, such as one that goes to a specific product page, based on product ID. The code that is generated includes the block reference, location of the code module, and corresponding PHTML template. After the code is generated, you can copy and paste it from one place to another.

The code in the following example can be added to a page or block to display the list of new products.

“New Products Grid” Code

```
{{widget type="catalog/product_widget_new"
display_type="new_products" products_count="10"
template="catalog/product/widget/new/content/new_grid.phtml"}}
```

The code in the next example can be added to a page or block to display a link to a specific product, by product ID.

“Link to Product” Code

```
{{widget type="catalog/product_widget_link" anchor_text="My Product
Link"
title="My Product Link" template="catalog/product/widget/link/link_
block.phtml"
id_path="product/31"}}
```

Using Markup Tags in Links

You can use markup tags with HTML anchor tags, and link directly to any page in your store. The link can be incorporated into content pages, blocks, banners, or email and newsletter templates. You can also use this technique to link an image to a specific page.

Process Overview:

Step 1: **Identify the Destination URL**

Step 2: **Add the Markup to the URL**

Step 3: **Complete the Anchor Tag**

Step 1: Identify the Destination URL

If possible, navigate to the page that you want to link to, and copy the full URL from the address bar of your browser. The part of the URL that you need comes after the “dot com forward slash.” Otherwise, copy the URL Key from the CMS page that you want to use as the link destination.

Full URL to Category Page

```
http://mystore.com/apparel/shoes/womens
```

```
http://mystore.com/apparel/shoes/womens.html
```

Full URL to Product Page

```
http://mystore.com/apparel/shoes/womens/nine-west-pump
```

```
http://mystore.com/apparel/shoes/womens/nine-west-pump.html
```

Full URL to CMS Page

```
http://mystore.com/about-us
```

Step 2: Add the Markup to the URL

The Store URL tag represents the base URL of your website, and is used as a substitute for the “http address” part of the store URL, including the domain name and “dot com.” There are two versions of the tag, which you can use, depending on the results you want to achieve.

<code>store direct_url</code>	Links directly to a page.
<code>store url</code>	Places a forward slash at the end, so additional references can be appended as a path.

In the following examples, the URL Key is enclosed in single quotes, and the entire markup tag is enclosed in double curly braces. When used with an anchor tag, the markup tag is placed inside the double quotes of the anchor. To avoid confusion, you can alternate using single-and double quotes for each nested set of quotes.

1. If you are starting with a full URL, delete the “http address” part of the URL, up through and including the “dot.com forward slash.” In its place, type the Store URL markup tag, up through the opening single quote.

Store URL Markup Tag

```
http://mystore.com/apparel/shoes/womens  
{{store url='apparel/shoes/womens'}}
```

Otherwise, type the first part of the Store URL markup tag, and paste the URL key or path that you copied earlier.

Store URL Markup Tag with URL Key

```
{{store url='  
{{store url='apparel/shoes/womens'}}
```

2. To complete the markup tag, type the closing double quotes and double braces.

Step 3: Complete the Anchor Tag

1. Wrap the completed markup tag inside an anchor tag, using the markup tag instead of the target URL. Then, add the link text, and closing anchor tag.

Markup in Anchor Tag

```
<a href="{{markup tag goes here}}">Link Text</a>
```

2. Paste the completed anchor tag into the code of any CMS page, block, banner, or email template, where you want the link to appear.

Complete Link with Markup

```
<a href="{{store url='apparel/shoes'}}">Shoe Sale</a>
```

Variable Reference

Most email templates have a section of additional variables that are specific to the template. The following are examples of some frequently used templates.

Email Template Variables

VARIABLE	MARKUP TAG
Email Footer Template	<code>{{template config_path="design/email/footer_template"}}</code>
Email Header Template	<code>{{template config_path="design/email/header_template"}}</code>
Email Logo Image Alt	<code>{{var logo_alt}}</code>
Email Logo Image URL	<code>{{var logo_url}}</code>
Email Logo Image Height	<code>{{var logo_height}}</code>
Email Logo Image Width	<code>{{var logo_width}}</code>
Template CSS	<code>{{var template_styles raw}}</code>

Store Contact Information Variables

VARIABLE	MARKUP TAG
Base Unsecure URL	<code>{{config path="web/unsecure/base_url"}}</code>
Base Secure URL	<code>{{config path="web/secure/base_url"}}</code>
General Contact Name	<code>{{config path="trans_email/ident_general/name"}}</code>
General Contact Email	<code>{{config path="trans_email/ident_general/email"}}</code>

Store Contact Information Variables (cont.)

VARIABLE	MARKUP TAG
Sales Representative Contact Name	<code>{{config path="trans_email/ident_sales/name"}}</code>
Sales Representative Contact Email	<code>{{config path="trans_email/ident_sales/email"}}</code>
Custom1 Contact Name	<code>{{config path="trans_email/ident_custom1/name"}}</code>
Custom1 Contact Email	<code>{{config path="trans_email/ident_custom1/email"}}</code>
Custom2 Contact Name	<code>{{config path="trans_email/ident_custom2/name"}}</code>
Custom2 Contact Email	<code>{{config path="trans_email/ident_custom2/email"}}</code>
Store Name	<code>{{config path="general/store_information/name"}}</code>
Store Phone Telephone	<code>{{config path="general/store_information/phone"}}</code>
Store Hours	<code>{{config path="general/store_information/hours"}}</code>
Country	<code>{{config path="general/store_information/country_id"}}</code>
Region/State	<code>{{config path="general/store_information/region_id"}}</code>
Zip/Postal Code	<code>{{config path="general/store_information/postcode"}}</code>
City	<code>{{config path="general/store_information/city"}}</code>
Street Address 1	<code>{{config path="general/store_information/street_line1"}}</code>
Street Address 2	<code>{{config path="general/store_information/street_line2"}}</code>
Store Contact Address	<code>{{config path="general/store_information/address"}}</code>

New Account Template Variables

VARIABLE	MARKUP TAG
Customer Account URL	<code>{{var this.getUrl(\$store, 'customer/account/')}}</code>
Customer Email	<code>{{var customer.email}}</code>
Customer Name	<code>{{var customer.name}}</code>

New Order Template Variables

VARIABLE	MARKUP TAG
Billing Address	<code>{{var formattedBillingAddress raw}}</code>
Email Order Note	<code>{{var order.getEmailCustomerNote()}}</code>
Order ID	<code>{{var order.increment_id}}</code>
Order Items Grid	<code>{{layout handle="sales_email_order_items" order=\$order area="frontend"}}</code>
Payment Details	<code>{{var payment_html raw}}</code>
Shipping Address	<code>{{var formattedShippingAddress raw}}</code>
Shipping Description	<code>{{var order.getShippingDescription()}}</code>

SEO & Search

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.

Contents

- Catalog Navigation
 - Top Navigation
 - Breadcrumb Trail
 - Product Listings
 - Pagination Controls
 - Layered Navigation
 - Filterable Attributes
 - Price Navigation
 - Configuring Layered Navigation
- Catalog Search
 - Quick Search
 - Advanced Search
 - Search Results
 - Search Suggestions
 - Search Configuration
 - Using a Flat Catalog
- Search Terms
 - Popular Search Terms
 - Adding Search Terms
 - Search Terms Report
- SEO Best Practices
 - Meta Data
 - Canonical Meta Tag
 - Using a Sitemap
 - Sitemap Configuration
 - Search Engine Robots
 - SEO URL Rewrites
 - Configuring URL Rewrites
 - Automatic Product Redirects
 - Creating URL Rewrites
 - Product
 - Category
 - CMS Page



CHAPTER 25:

Catalog Navigation

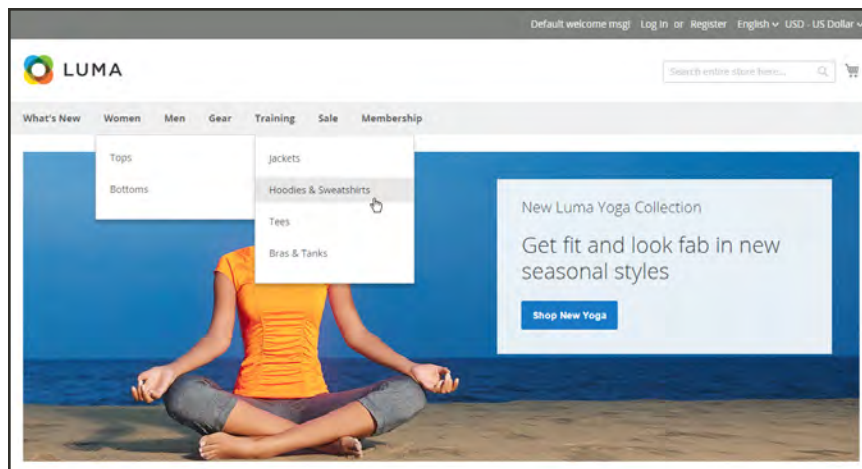
The term **navigation**¹ refers to the methods shoppers use to move from page to page throughout your store. The main menu, or top navigation of your store is actually a list of category links, and provides easy access to the products in your catalog. You will also find categories in the breadcrumb trail that runs across the top of most pages, and in the layered navigation that appears on the left side of some two- or three-column pages.

For a product to be visible in your store, it must be assigned to at least one category. Each category can have a dedicated landing page with an image, static block, a description, and a list of products in the category. You can also create special designs for category pages that are active only for a specific period of time such as for a holiday or promotion.

¹The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

Top Navigation

The main menu of your store is like a directory to the different departments in your store. Each option represents a different category of products. The position and presentation of the top navigation might vary by theme, but the way it works is essentially the same.



Top Navigation


The category structure of your catalog can influence how well your site is indexed by search engines. The deeper a category, the less likely it is to be thoroughly indexed. As a general rule, anywhere between one and three levels is considered to be the most effective. The maximum number of levels that are available in your top navigation is set in the system configuration.

To set the depth of the top navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, expand **Catalog**. Then, choose **Catalog**.
3. Expand the **Category Top Navigation** section.
4. To limit the number of subcategories that appear in the top navigation, enter the number in the **Maximal Depth** field.

The default Maximal Depth value is zero, which does not place a limit on the number of subcategory levels.

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



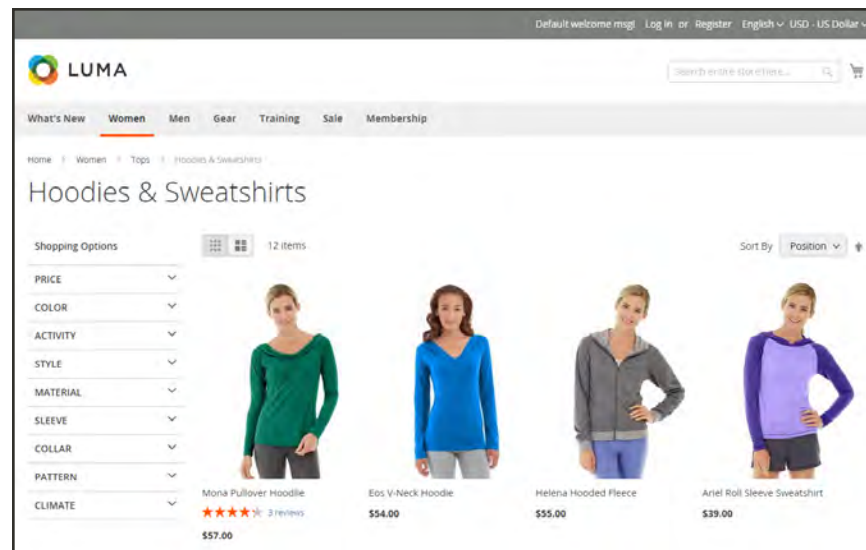
The screenshot shows a configuration panel titled "Category Top Navigation" with a dropdown arrow on the left. Below the title is a horizontal line. Underneath, there is a label "Maximal Depth" followed by a text input field containing the number "0". To the right of the input field is a button labeled "[GLOBAL]" with a small icon to its left.

Category Top Navigation

Breadcrumb Trail

A breadcrumb trail is a set of links that shows where you are in relation to other pages in the store. You can click any link in the breadcrumb trail to return to the previous page. Here's an example of a breadcrumb trail from the demo store:

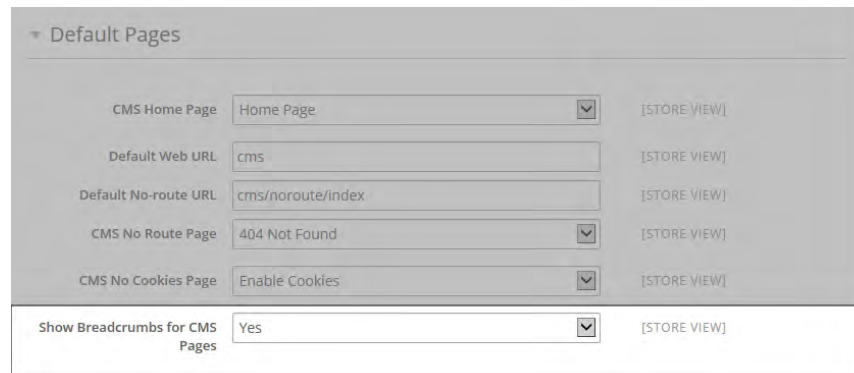
The breadcrumb trail can be configured to appear on content pages, as well as catalog pages. The format and position of the breadcrumb trail varies by theme, but it is usually located just below the header.



Breadcrumb Trail

To add breadcrumbs to CMS pages:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under General, choose **Web**. Then, do the following:
 - a. Expand the **Default Pages** section.
 - b. Set **Show Breadcrumbs for CMS Pages** to “Yes.”
3. When complete, tap **Save Config**.



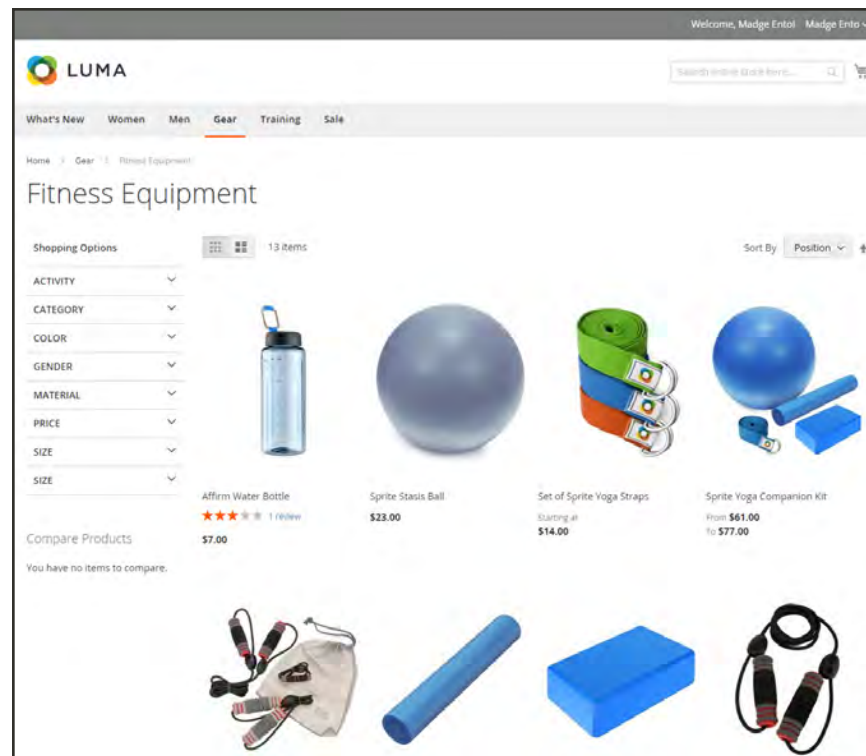
The screenshot shows the 'Default Pages' configuration section in the Magento Admin. It contains several settings, each with a text input field, a dropdown menu, and a '[STORE VIEW]' link. The 'Show Breadcrumbs for CMS Pages' setting is highlighted with a white border and has its dropdown menu set to 'Yes'.

Setting	Value	Action
CMS Home Page	Home Page	[STORE VIEW]
Default Web URL	cms	[STORE VIEW]
Default No-route URL	cms/noroute/index	[STORE VIEW]
CMS No Route Page	404 Not Found	[STORE VIEW]
CMS No Cookies Page	Enable Cookies	[STORE VIEW]
Show Breadcrumbs for CMS Pages	Yes	[STORE VIEW]

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:

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

- List Mode:** Grid (default) / List [STORE VIEW]
- Products per Page on Grid Allowed Values:** 9,15,30 [STORE VIEW]
Comma-separated.
- Products per Page on Grid Default Value:** 9 [STORE VIEW]
Must be in the allowed values list
- Products per Page on List Allowed Values:** 5,10,15,20,25 [STORE VIEW]
Comma-separated.
- Products per Page on List Default Value:** 10 [STORE VIEW]
Must be in the allowed values list
- Allow All Products per Page:** No [STORE VIEW]
Whether to show "All" option in the "Show X Per Page" dropdown
- Product Listing Sort by:** Position [STORE VIEW]
- Use Flat Catalog Category:** No [GLOBAL]
- Use Flat Catalog Product:** No [GLOBAL]
- Allow Dynamic Media URLs in Products and Categories:** Yes [STORE VIEW]
E.g. `{{media url="path/to/image.jpg"}} {{skin url="path/to/picture.gif"}}`. Dynamic directives parsing impacts catalog performance.
- Swatches per Product:** 16 [STORE VIEW]

Storefront

- a. Set the default **List Mode** to one of the following:
 - Grid Only
 - List Only
 - Grid (default) / List
 - List (default / Grid)
- b. In the **Products per Page on Grid Allowed Values** field, enter the number of products that you want to appear per page when shown in grid format. To enter a selection of values, separate each number by a comma.
- c. In the **Products per Page on Grid Default Value** field, enter the default number of products to appear in the grid per page.

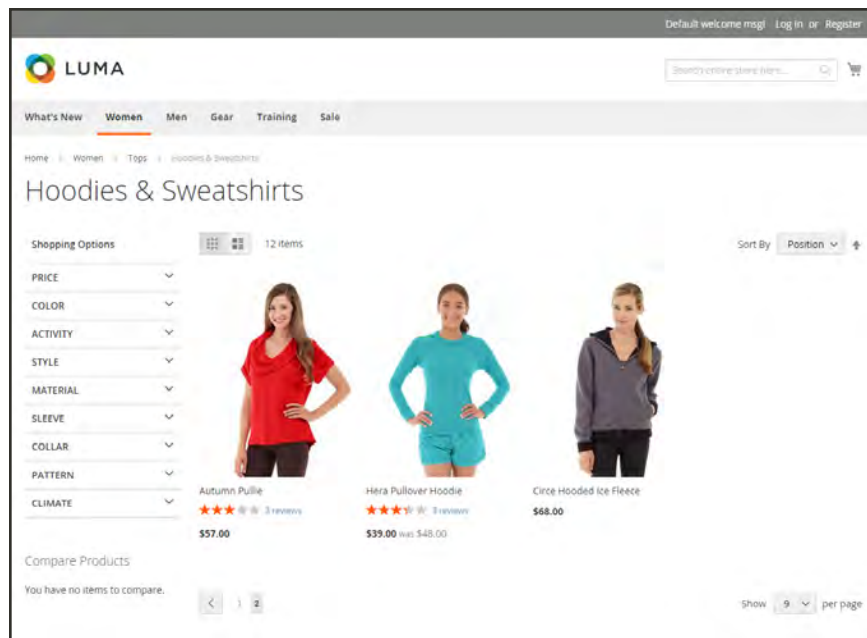
- d. In the **Products per Page on List Allowed Values** field, enter the number of products that you want to appear per page when shown in list format. To enter a selection of values, separate each number by a comma.
 - e. In the **Products per page on List Default Value** field, enter the default number of products that appear in the list, per page.
 - f. To give customers the option to list all products, set **Allow All Products on Page** to “Yes.”
 - g. Set **Product Listing Sorted** by to the default attribute that is initially used to sort the list.
4. If using a **flat catalog**, do the following:
 - a. To display a flat category listing of products, set **Use Flat Catalog Category** to “Yes.”
 - b. To display a flat product listing, set **Use Flat Catalog Product** to “Yes.”
 5. If you want to allow dynamic references for media assets in category and product URLs, set **Allow Dynamic Media URLs in Products and Categories** to “Yes.”
 6. When complete, tap **Save Config**.

Page Controls

CONTROL	DESCRIPTION
View As	Displays the list in either a Grid or List format.
Sort By	Changes the sort order of the list.
Show Per Page	Determines how many products appear per page.
Pagination Links	Navigation links to other pages.

Pagination Controls

The Pagination settings appear at the top and bottom of the list, and control the format of the pagination links for product listings. You can set the number of links that appear in the control, and configure the Next and Previous links. For the pagination links to appear, there must be more products in the list than are allowed per page in the product list configuration.



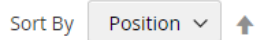
Pagination Controls

Pagination Controls



View As

Displays the list in either a Grid or List format.



Sort By

Changes the sort order of the list.



Show Per Page

Determines how many products appear per page.

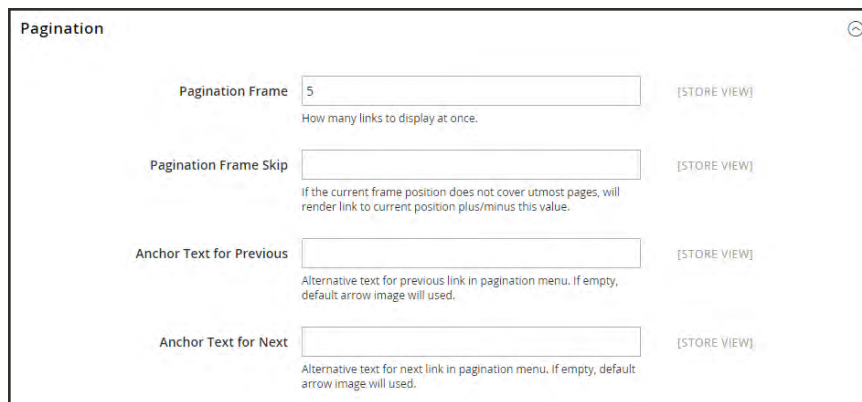


Pagination Links

Navigation links to other pages.

To configure the pagination controls:

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



Pagination

- a. In the **Pagination Frame** field, enter the number of links that you want to appear in the pagination control.
- b. In the **Pagination Frame Skip** field, enter the number of links that you want to skip ahead before displaying the next set of links in the pagination control.

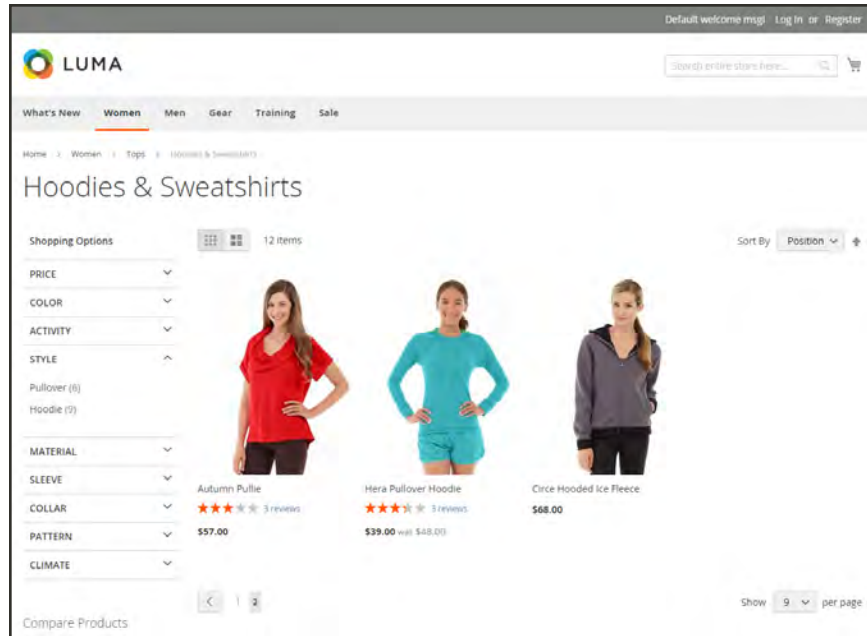
For example, if the pagination frame has five links, and you want to jump to the next five links, how many links do you want to skip ahead? If you set this to four, then the last link from the previous set will be the first link in the next set.

- c. In the **Anchor Text for Previous** field, enter the text that you want to appear for the Previous link. Leave blank to use the default arrow.
- d. In the **Anchor Text for Next** field, enter the text that you want to appear for the Next link. Leave blank to use the default arrow.

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

Layered Navigation

Layered navigation makes it easy to find products based on category, price range, or any other available attribute. Layered navigation usually appears in the left column of search results and category pages and sometimes on the home page. The standard navigation includes a “Shop By” list of categories and price range. You can configure the display of layered navigation, including product count and price range.

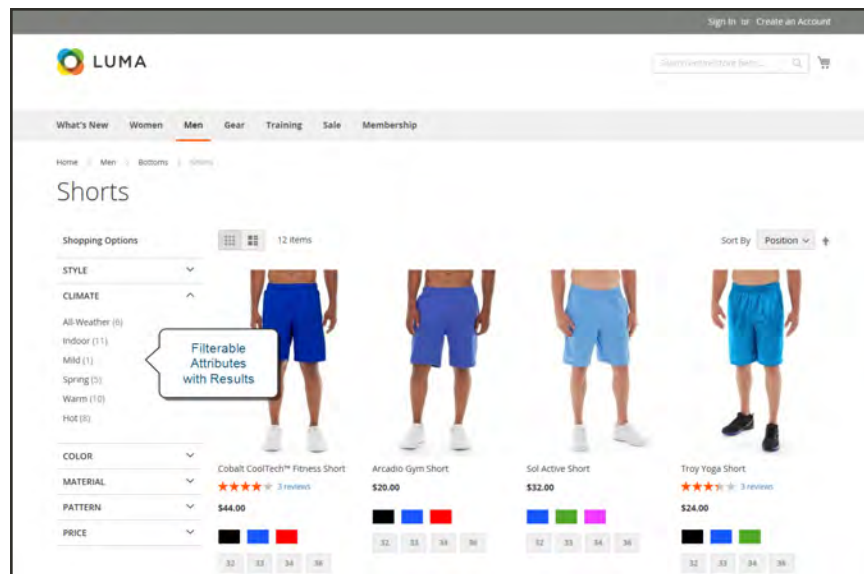


Layered Navigation by Category and Price

Layered Navigation with Filterable Attributes

Layered navigation can be used to 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 number of matching results can appear in parentheses after the value.

The attribute properties, combined with the product input type determines which attributes can be used for layered navigation. Layered navigation is available only for “anchor” categories, but can also be added to search results pages. The **Catalog Input Type for Store Owner** property of each attribute must be set to “Dropdown,” “Multiple Select,” or “Price.” To make the attributes filterable, the **Use in Layered Navigation** property of each must be set to either “Filterable (with results)” or “Filterable (no results).”



Filterable Attributes 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:

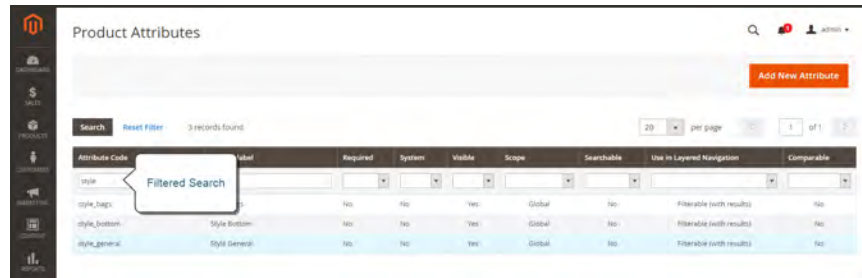
Step 1: [Set Up the Attribute Properties](#)

Step 2: [Make the Category an Anchor](#)

Step 3: [Test the Results](#)

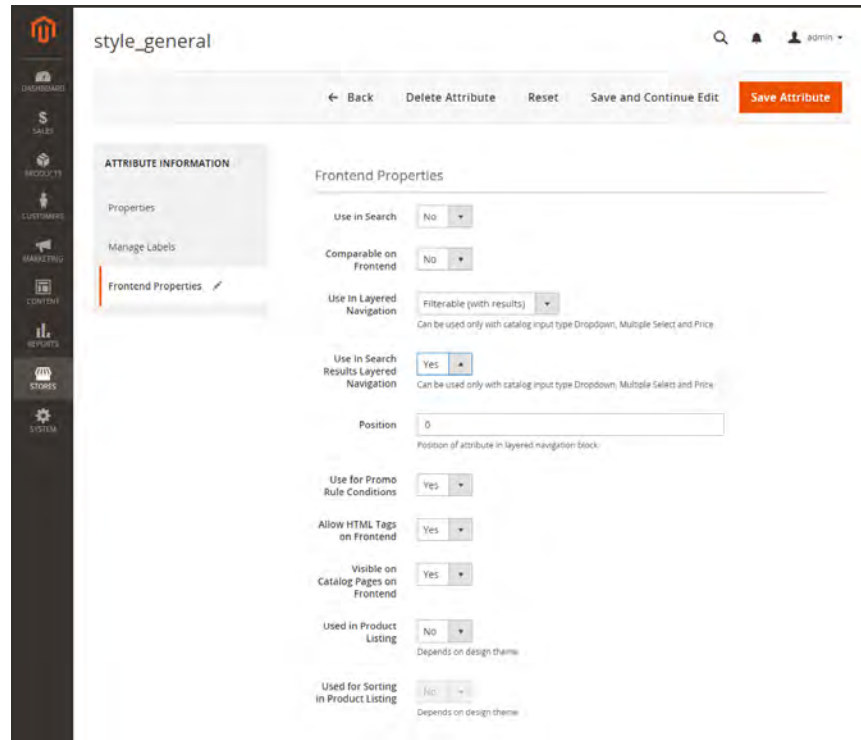
Step 1: Set Up the Attribute Properties

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

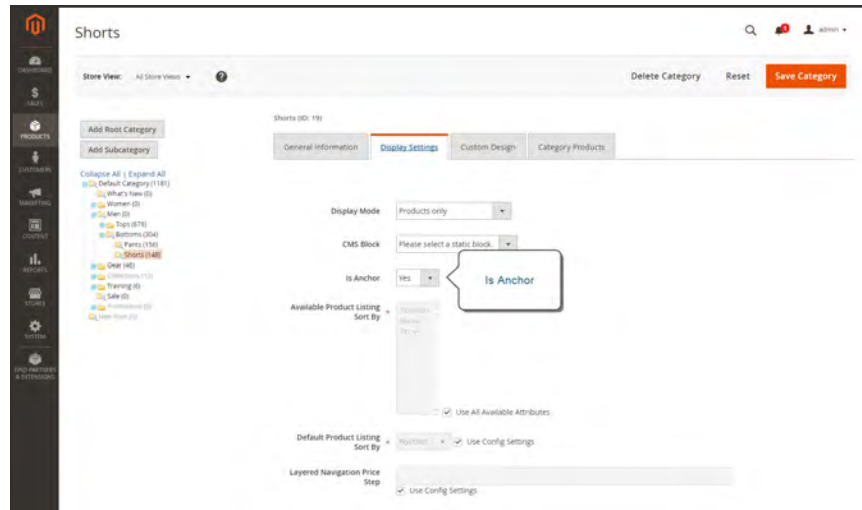
- a. In the panel on the left, choose **Frontend Properties**. Then, set **Use In Layered Navigation** to one of the following:
 - Filterable (with results)
 - Filterable (no results)
 - b. Set **Use In Search Results Layered Navigation** to “Yes.”
3. Repeat these steps for each attribute that you want to include in layered navigation.



Attribute Frontend Properties

Step 2: Make the Category an Anchor

1. On the Admin sidebar, tap **Products**. Then under **Inventory** choose **Categories**.
2. In the categories tree on the left, select the category where you want to use layered navigation.
3. On the **Display Settings** tab, set **Is Anchor** to “Yes.”
4. Tap **Save Category**.



Category Display Settings

Step 3: Test the Results

To test the setting, go to your store and choose the category in the top navigation. The selection of filterable attributes appears in the layered navigation section of the category page.

Price Navigation

Price navigation can be used to distribute products by price range in layered navigation. You can also split each range in intervals. There are ways to calculate price navigation:

- Automatic (Equalize Price Ranges)
- Automatic (Equalize Product Counts)
- Manual

With the first two methods, the navigation steps are calculated automatically. The manual method lets you specify a division limit for price intervals. The following example shows the difference between price navigation steps of 10 and 100.

Iterative splitting provides the best distribution of products among price ranges. With iterative splitting, after choosing the \$0.00-\$99 range, the customer can drill-down through several sub-ranges of prices. Price-range splitting stops when the number of products reaches the threshold set by the Interval Division Limit.

Example: Price Navigation Steps

PRICE STEP BY 10	PRICE STEP BY 100
\$20.00 - \$29.99 (1)	\$0.00 - \$99.99 (4)
\$30.00 - \$39.99 (2)	\$100 - \$199.99 (5)
\$70.00 - \$79.99 (1)	\$400.00 - \$499.99 (2)
\$100.00 - \$109.99 (1)	\$700.00 and above (1)
\$120.00 - \$129.99 (2)	
\$150.00 - \$159.99 (1)	
\$180.00 - \$189.99 (1)	
\$420.00 - \$429.99 (1)	
\$440.00 - \$449.99 (1)	
\$710.00 and above (1)	

To configure price navigation:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Layered Navigation** section.
4. To show the number of products in parentheses after each filtered item, set **Display Product Count** to “Yes.”
5. Set **Price Navigation Steps Calculation** to one of the following methods:

Method 1: Automatic (equalize price ranges)

Leave **Price Navigation Steps Calculation** set to the default, “Automatic (Equalize Price Ranges.)” This setting uses the standard algorithm for price navigation.



Layered Navigation	
Display Product Count	Yes [STORE VIEW]
Price Navigation Step Calculation	Automatic (equalize price ranges) [STORE VIEW]

Layered Navigation

Method 2: Automatic (equalize product counts)

1. Set **Price Navigation Steps Calculation** to “Automatic (equalize product counts).”
2. Set **Display Price Interval as One Price** to “Yes” if you want to display a single price when multiple products with the same price.
3. In the **Interval Division Limit** field, enter the threshold for a number of products within a price range. The range cannot be further split beyond this limit., The default value is 9.

▼ Layered Navigation

Display Product Count [STORE VIEW]

Price Navigation Step Calculation [STORE VIEW]

Display Price Interval as One Price [STORE VIEW]
▲ This setting will be applied when all prices in the specific price interval are equal.

Interval Division Limit [STORE VIEW]
▲ Please specify the number of products, that will not be divided into subintervals.

Automatic (equalize product counts)

Method 3: Manual

1. Set **Price Navigation Steps Calculation** to “Manual.”
2. Enter a value to determine the **Default Price Navigation Step**.
3. Enter the **Maximum Number of Price Intervals** allowed, up to 100.

▼ Layered Navigation

Display Product Count [STORE VIEW]

Price Navigation Step Calculation [STORE VIEW]

Default Price Navigation Step [STORE VIEW]

Maximum Number of Price Intervals [STORE VIEW]
▲ Maximum number of price intervals is 100

Manual

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

Configuring Layered Navigation

The layered navigation configuration determines if a product count appears in parentheses after each attribute, and the size of the step calculation that is used in price navigation.

To configure layered navigation:

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



▼ Layered Navigation

Display Product Count Yes [STORE VIEW]

Price Navigation Step Calculation Automatic (equalize price ranges) [STORE VIEW]

Layered Navigation

- a. To display the number of products found for each attribute, set **Display Product Count** to “Yes.”
 - b. Set **Price Navigation Step Calculation** to “Automatic (equalize price ranges).”
4. When complete, tap **Save Config**.



CHAPTER 26:

Catalog Search

Research shows that people who use search are more likely to make a purchase than those who rely on navigation alone. In fact, according to some studies, people who use search are nearly twice as likely to make a purchase. In this section of the guide, we will explore how customers search for products in your catalog, and how you can configure catalog search.

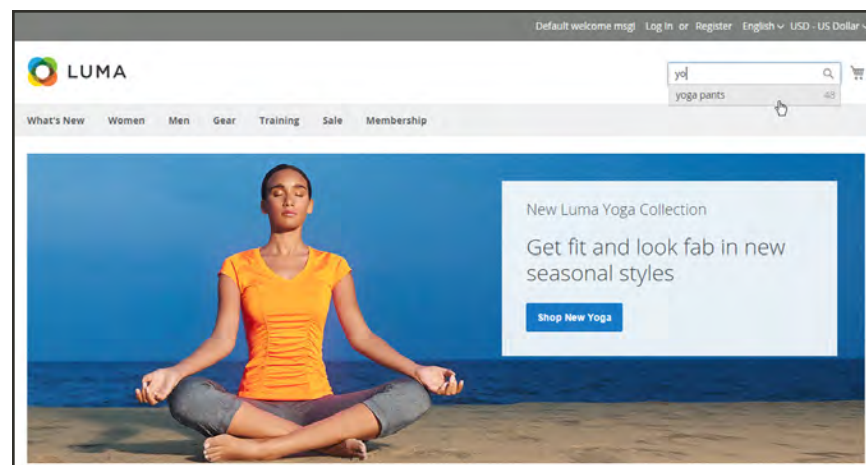
- [Quick Search](#)
- [Advanced Search](#)
- [Search Results](#)
- [Search Suggestions](#)
- [Configuring Catalog Search](#)
- [Flat Catalog](#)

Quick Search

The Search box in the header of the store helps visitors find products in your catalog. The search text can be the full or partial product name, or any other word or phrase that describes the product. The search terms that people use to find products can be managed from the Admin.

To do a quick search:

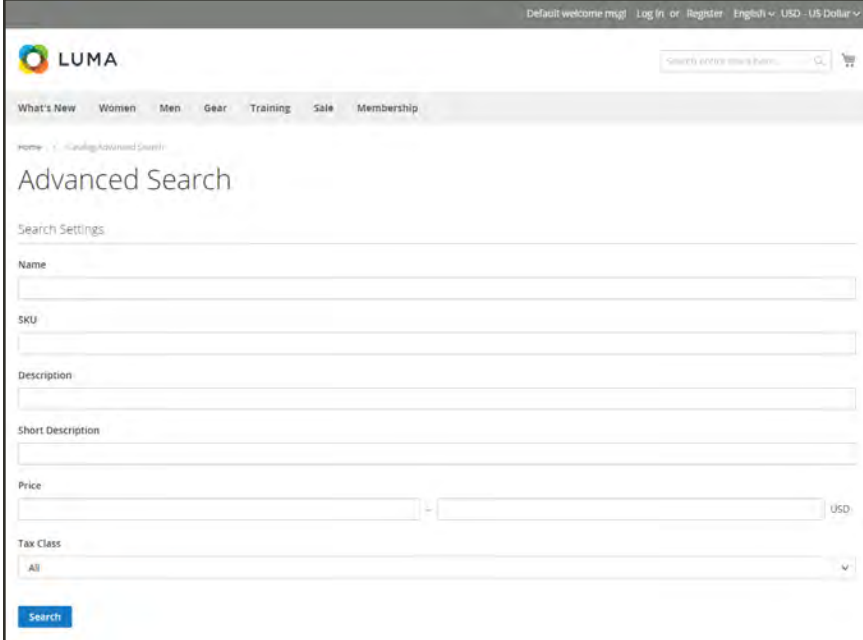
1. In the **Search** box, enter the first few letters of what you want to find.
Any matches in the catalog appear below, with the number of results found.
2. Either press the **Enter** key or tap a result in the list of matching products.



Search

Advanced Search

Advanced Search lets shoppers search the catalog based on values entered into a form. Because the form contains multiple fields, a single search can include several parameters. The result is a list of all products in the catalog that match the criteria. A link to Advanced Search is in the footer of your store.

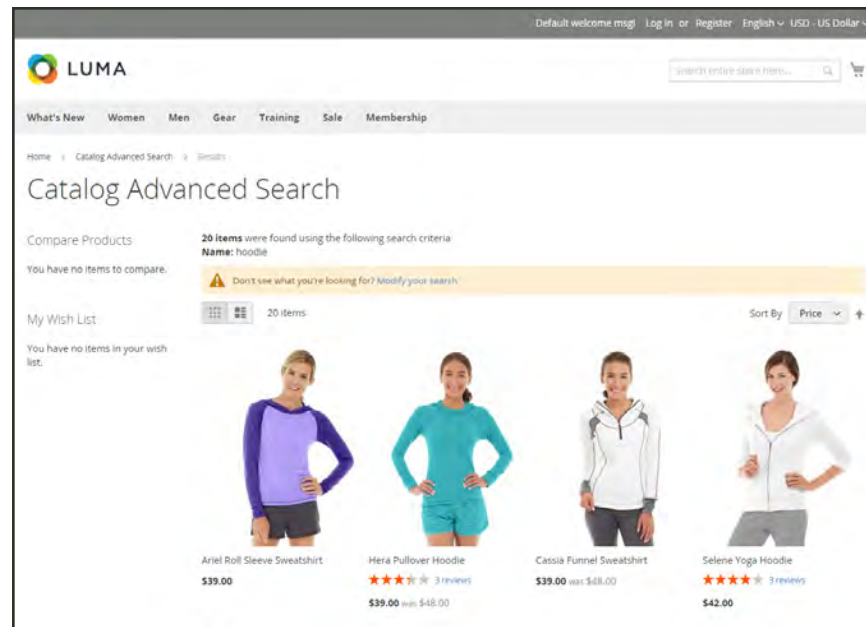
A screenshot of the LUMA e-commerce store's Advanced Search page. The page features a search bar at the top right with the text "Search across 1000 items". Below the search bar is a navigation menu with links for "What's New", "Women", "Men", "Gear", "Training", "Sale", and "Membership". The main heading is "Advanced Search". Underneath, there is a "Search Settings" section with several input fields: "Name", "SKU", "Description", "Short Description", "Price" (with a range selector and "USD" currency), and "Tax Class" (a dropdown menu set to "All"). A blue "Search" button is located at the bottom left of the form.

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.



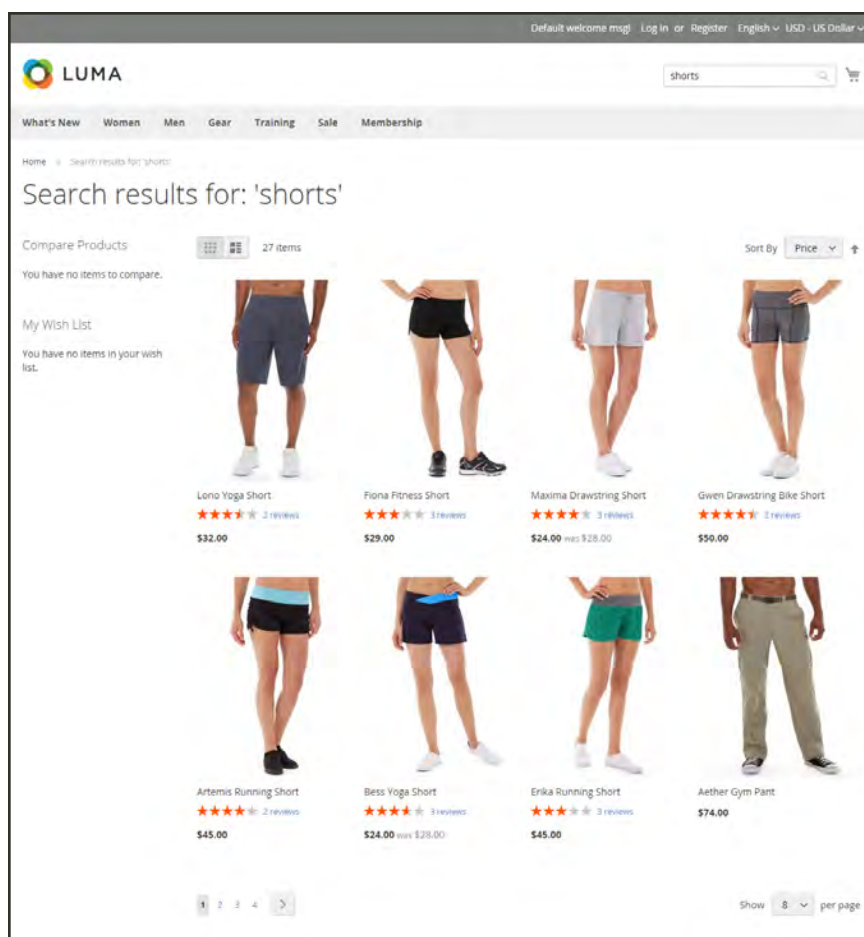
Search Results

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](#).

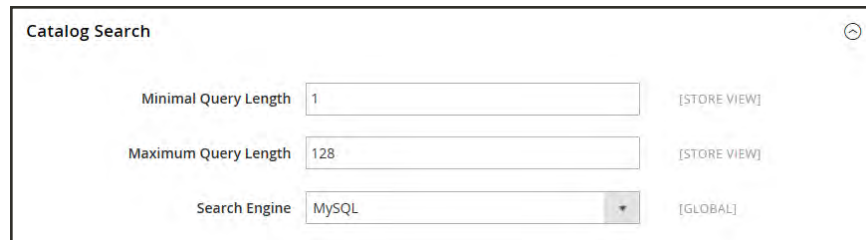
The results can be formatted as either a grid or list, and sorted by a selection of attributes. [Pagination](#) controls appear if there are more products than fit on the page, and are used to move from one page to the next. The number of records per page is determined by the Catalog Frontend configuration. To learn more, see: [Product Listings](#)



Search Results with Pagination Controls

Configuring Catalog Search

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.



Setting	Value	Scope
Minimal Query Length	1	[STORE VIEW]
Maximum Query Length	128	[STORE VIEW]
Search Engine	MySQL	[GLOBAL]

Catalog Search

To configure catalog search:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Catalog Search** section, and do the following:
4. To limit the length and word count of search query text, do the following:
 - a. Set **Minimal Query Length** to the minimum number of characters that can be submitted in a query.
 - b. Set **Maximum Query Length** to the maximum number of characters that can be submitted in a query.
5. Accept the default, **Search Engine**, “MySQL.”
6. To limit the number of records that can be used with layered navigation, enter the maximum number allowed in the **Apply Layered Navigation if Search Results are Less Than** field. To allow any number of records, enter zero.
7. When complete, tap **Save Config**.

Using a Flat Catalog

Magento typically stores catalog data in multiple tables, based on the Entity-Attribute-Value (EAV¹) model. Because product attributes are stored in many tables, SQL queries are sometimes long and complex.

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

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

Process Overview:

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

Step 2: [Verify the Results](#)

Step 1: Enable the Flat Catalog

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

Use Flat Catalog Category	Yes	[GLOBAL]
Use Flat Catalog Product	Yes	[GLOBAL]

Flat Catalog Configuratio

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

¹Entity Attribute Value

5. When prompted to update the cache, click the **Cache Management** link in the system message, and follow the instructions to refresh the cache.



Refresh Cache

Step 2: Verify the Results

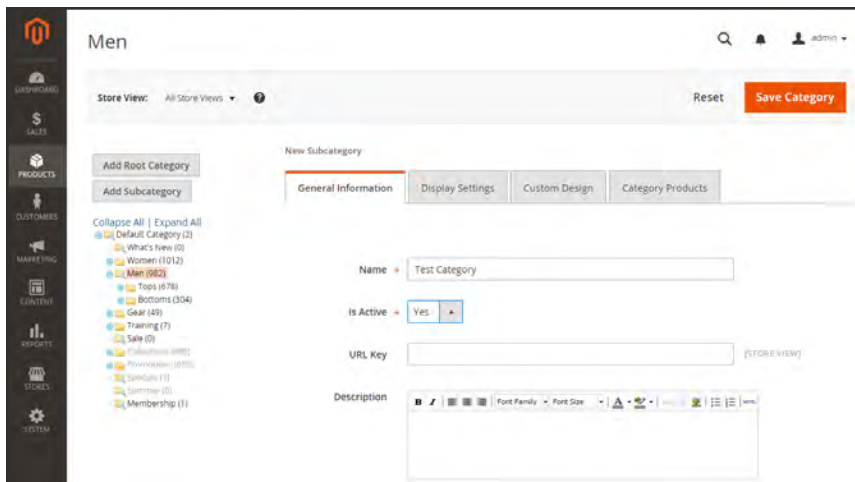
Method 1: Verify the Results for a Single Product

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

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

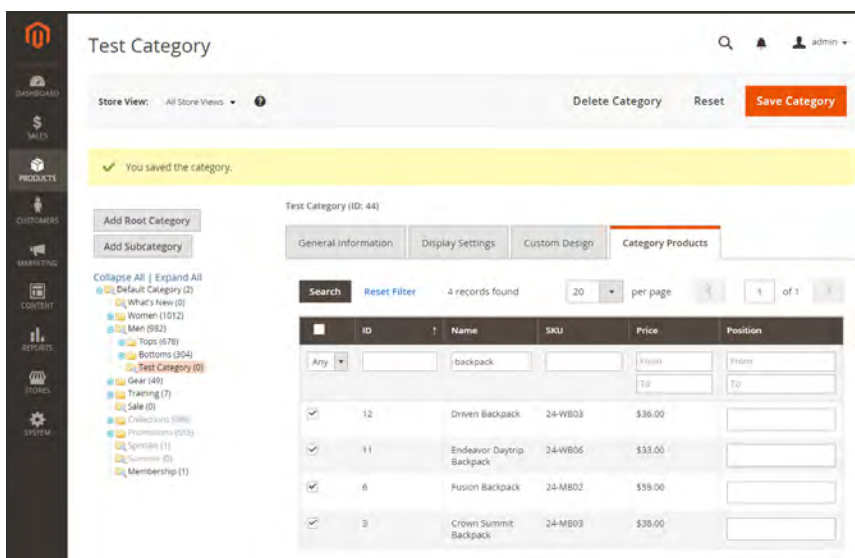
Method 2: Verify the Results for Multiple Products

1. On the Admin sidebar, tap **Products**. Then under Inventory, choose **Categories**.
2. In the upper-left corner, set **Store View** to one of the following:
 - All Store Views
 - A specific store view
3. In the category tree, select an existing category. Tap **Add Subcategory**, and do the following:
 - a. In the **Name** field, enter “Test Category.”
 - b. Set **Is Active** to “Yes.”
 - c. Click **Save Category**.



Test Subcategory

- d. On the **Category Products** tab, tap **Reset Filter** to display all products.
- e. Mark the checkbox of several products to add them to the new category. Then, tap **Save Category**.



Test Category Products

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

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



CHAPTER 27:

Search Terms

You can learn what your customers are looking for by examining the search terms they use to find products in your store. If enough people look for a product that you don't carry, perhaps it's time to add it to your catalog. Meanwhile, rather than have them leave them empty handed, why not redirect them to another product in your catalog? Here are a few ways you can leverage customer search terms:

Landing Page

The landing page for a search term can be a content page, a category page, a product detail page, or even a page on a different site.

Synonyms

One way to improve the effectiveness of catalog search is to include different terms that people may use to describe the same item. You don't want to lose a sale just because someone is looking for a "sofa," and your product is listed as a "couch." You can capture a broader range of search terms by entering the words, "sofa" "davenport," and "loveseat" as synonyms for "couch," and direct them to the same landing page.

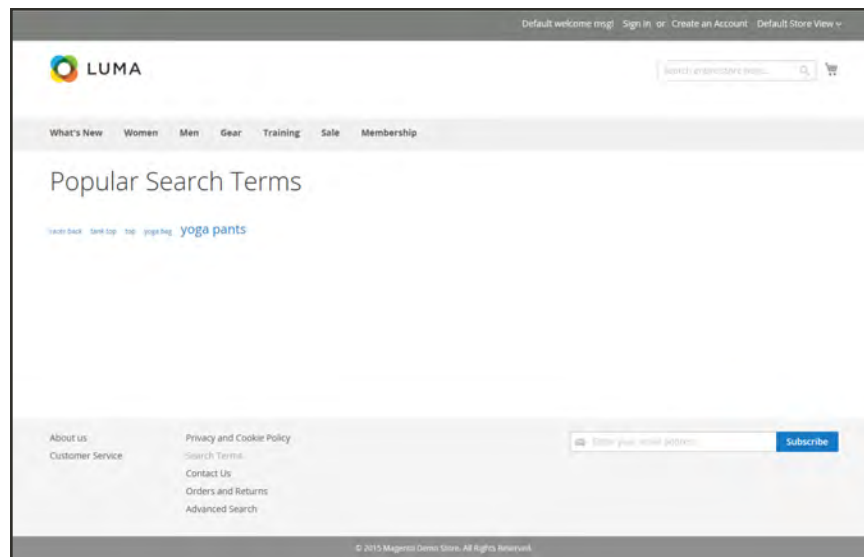
Misspelled Words

Use search terms to capture common misspellings and redirect them to the appropriate page. For example, if you sell wrought iron patio furniture, you know that many people misspell the term as "rod iron," or even "rot iron." You can enter each misspelled word as a search term, and make them synonyms for "wrought iron." Even though the word is misspelled, the search will be directed to the page for "wrought iron."

Popular Search Terms


The Search Terms link in the footer of your store displays the search terms used by visitors to your store, ranked by popularity. Search terms appear in a “tag cloud” format, where the size of the text indicates the popularity of the term.

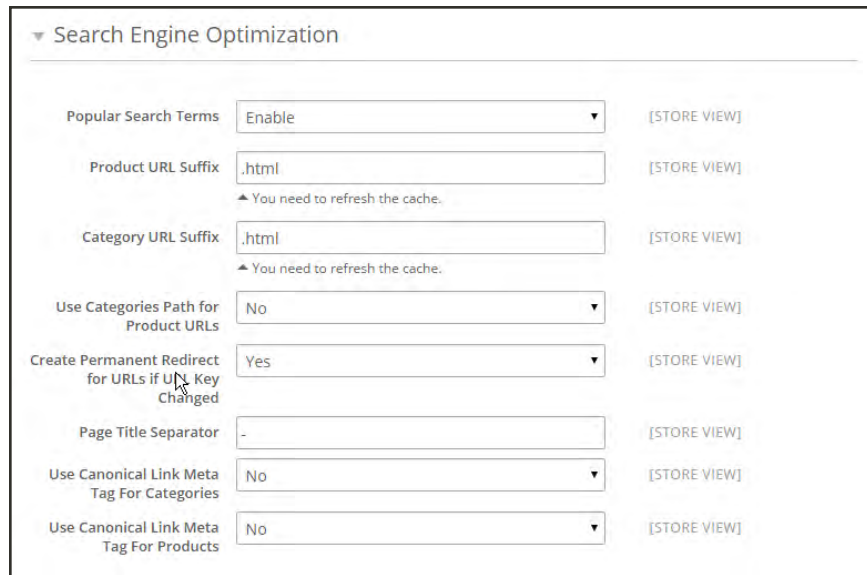
By default, Popular Search Terms is enabled as a search engine optimization tool, but has no direct connection to the catalog search process. Because the Search Terms page is indexed by search engines, any terms on the page can help improve your search engine ranking and the visibility of your store.



Popular Search Terms

To configure Popular Search Terms:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand  the **Search Engine Optimizations** section.
4. Set **Popular Search Terms** to “Enable.”
5. When complete, tap **Save Config**.



▼ Search Engine Optimization

Popular Search Terms	Enable	[STORE VIEW]
Product URL Suffix	.html	[STORE VIEW]
	▲ You need to refresh the cache.	
Category URL Suffix	.html	[STORE VIEW]
	▲ You need to refresh the cache.	
Use Categories Path for Product URLs	No	[STORE VIEW]
Create Permanent Redirect for URLs if URL Key Changed	Yes	[STORE VIEW]
Page Title Separator	-	[STORE VIEW]
Use Canonical Link Meta Tag For Categories	No	[STORE VIEW]
Use Canonical Link Meta Tag For Products	No	[STORE VIEW]

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 Query	Store	Results	Users	Synonym	Redirect URL	Suggested Terms	Action
yoga pants	Main Website Main Website Store Default Store View	24	3			yes	Edit
tank top	Main Website Main Website Store Default Store View	27	1			yes	Edit
racer back	Main Website Main Website Store Default Store View	18	1			yes	Edit
yoga bag	Main Website Main Website Store Default Store View	24	1			yes	Edit
top	Main Website Main Website Store Default Store View	18	1			yes	Edit

Search Terms

To add a new search term:

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **Search Terms**.
2. Tap **Add New Search Term**. Then, do the following:

New Search

← Back Reset Save Search

General information:

Search Query:

Store:

Synonym For:
Will make search for the query above return results for this search

Redirect URL:
ex. http://domain.com

Display in Suggested Terms: No

General Information

- a. In the General Information section, in the **Search Query** box, type the word or phrase that you want to add as a new search term.
 - b. If your store is available in multiple languages, choose the applicable **Store** view.
 - c. If the term is a synonym for another search term, enter the other term in the **Synonym For** field. Any search for the synonym is automatically redirected to the page for the other term.
 - d. To redirect the search results to another page in your store, or to another website, enter the full URL of the target page in the **Redirect URL** field.
 - e. If you want this term to be available for use as a suggestion whenever a search returns no results, set **Display in Suggested Terms** to “Yes.”
3. When complete, tap **Save Search**.

To edit a search term:

1. 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.

The screenshot shows the 'Search Terms Report' interface. At the top, there are search and filter controls, including a search bar, a 'Reset Filter' button, and a '5 records found' indicator. Below these are pagination controls showing '20 per page' and '1 of 1'. An 'Export' button is set to 'CSV'. The main table has the following data:

ID	Search Query	Store	Results	Hits
5	top	Main Website Main Website Store Default Store View	18	1
4	yoga bag	Main Website Main Website Store Default Store View	24	1
3	racer back	Main Website Main Website Store Default Store View	18	1
2	tank top	Main Website Main Website Store Default Store View	27	1
1	yoga pants	Main Website Main Website Store Default Store View	24	3

Search Terms Report



CHAPTER 28:

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 Community 2.0 includes a number of features to support your ongoing SEO effort.

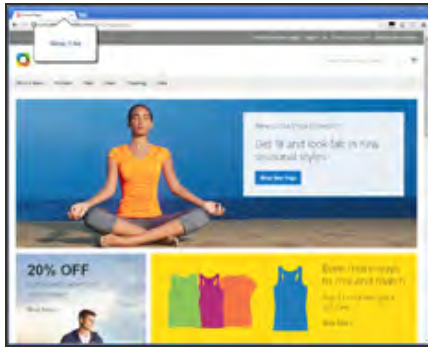


Commerce Resources

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

Some search engines penalize websites that have multiple URLs that point to the same content. The canonical meta tag tells search engines which page to index when multiple URLs have identical or very similar content. Using the canonical meta tag can improve your site ranking and aggregate pageviews. The canonical meta tag is placed in the <head> block of a product or category page. It provides a link to your preferred URL, so search engines will give it greater weight.

Example 1: Category Path Creates Duplicate URLs

For example, if your catalog is configured to include the category path in product URLs, your store will generate multiple URLs that point to the same product page.

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

Example 2: Category Page Full URL

When canonical meta tags for categories are enabled, the category page of your store includes a canonical URL to the full category URL:

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

Example 3: Product Page Full URL

When canonical meta tags for products are enabled, the product page includes a canonical URL to the domain-name/product-url-key because product URL keys are globally unique.

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

If you also include the category path in product URLs, the canonical URL remains domain-name/product-url-key. However, the product can also be accessed using its full URL, which includes the category. For example, if the product URL key is microfiber-sofa-sleeper and is assigned to the Furniture > Living-Room category, the product can be accessed using either URL.

You can avoid being penalized by search engines by omitting the category from the URL, or by using the canonical meta tag to direct search engines to index either by product or category. As a best practice, it is recommended that you enable canonical meta tags for both categories and products.

To enable the canonical meta tag:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose elect **Configuration**.
2. In the panel on the left under **Catalog**, choose **Catalog**.
3. Expand ☺ the **Search Engine Optimizations** section.

Search Engine Optimization		
Popular Search Terms	Enable	[STORE VIEW]
Product URL Suffix	.html	[STORE VIEW]
	▲ You need to refresh the cache.	
Category URL Suffix	.html	[STORE VIEW]
	▲ You need to refresh the cache.	
Use Categories Path for Product URLs	No	[STORE VIEW]
Create Permanent Redirect for URLs if URL Key Changed	Yes	[STORE VIEW]
Page Title Separator	-	[STORE VIEW]
Use Canonical Link Meta Tag For Categories	No	[STORE VIEW]
Use Canonical Link Meta Tag For Products	No	[STORE VIEW]

Search Engine Optimizations

4. If want search engines to index only pages that have a full category path, do the following:
 - a. Set **Use Canonical Link Meta Tag for Categories** to “Yes.”
 - b. Set **Use Canonical Link Meta Tag for Products** to “No.”
5. If you want search engines to index only product pages, do the following:
 - a. Set **Use Canonical Link Meta Tag for Products** to “Yes.”
 - b. Set **Use Canonical Link Meta Tag for Categories** to “No.”
6. When complete, tap **Save Config**.

Using a Sitemap

A sitemap improves the way your store is indexed by their search engine, and is specifically designed to find pages that might be overlooked by web crawlers. A sitemap can be configured to index all pages, and even images.

When enabled, Magento creates a file called `sitemap.xml` that is saved to the root directory of your installation. The configuration lets you set the frequency of the updates, and the priority for each type of content. Your sitemap should be updated as frequently as the content on your site changes, which might be daily, weekly, or monthly.

While your site is in development, you might include instructions in the `robots.txt` file for web crawlers to avoid indexing the site. Then before the launch, you can change the instructions to allow the site to be indexed.

Process Overview:

- Step 1: [Configure and Enable the Sitemap](#)
- Step 2: [Configure and Enable robots.txt \(Optional\)](#)
- Step 3: [Submit Your Sitemap to Search Engines](#)
- Step 4: [Restore the Previous Robot Instructions \(Optional\)](#)

Step 1: [Configure and Enable the Sitemap](#)

Complete the [XML Sitemap configuration](#) to determine what is included, and how frequently the sitemap is updated.

Step 2: [Configure and Enable robots.txt](#) (Optional)

Complete the [Search Engine Robots](#) configuration with instructions that direct search engines to crawl the parts of your site that you want to be indexed.

Step 3: [Submit Your Sitemap to Search Engines](#)

You can submit your sitemap to different search engines by providing them a link to the `sitemap.xml` file in the root of your Magento installation. For more information, see the search engine instructions. Here are links to instructions for the two top search engines:

- [Google](#)
- [Microsoft Bing](#)

Step 4: [Restore Previous Robot Instructions](#) (Optional)


You can now restore either the original, or default restrictions.

Sitemap Configuration

Your sitemap should be updated as frequently as the content on your site changes, which could be on a daily, weekly, or monthly basis. The configuration lets you set the frequency and priority for each type of content.

Step 1: Set the Frequency and Priority of Content Updates

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Catalog**, choose **XML Sitemap**.
3. Expand ☺ the **Categories Options** section. Then, do the following:
 - a. Set **Frequency** to one of the following:
 - Always
 - Hourly
 - Daily
 - Weekly
 - Monthly
 - Yearly
 - Never
 - b. In the **Priority** field, enter a value between 0.0 and 1.0. Zero has the lowest priority.



Categories Options

Frequency [STORE VIEW]

Priority [STORE VIEW]

▲ Valid values range from 0.0 to 1.0.

Categories Options

4. Click to expand the **Products Options** section. Then, complete the **Frequency** and **Priority** settings as needed.
5. To determine the extent that images are included in the sitemap, set **Add Images into Sitemap** to one of the following:
 - None
 - Base Only
 - All

▼ Products Options

Frequency [STORE VIEW]

Priority [STORE VIEW]
▲ Valid values range from 0.0 to 1.0.

Add Images into Sitemap [STORE VIEW]

Products Options

6. Click to expand the **CMS Pages Options** section. Then, complete the **Frequency** and **Priority** settings as needed.

▼ CMS Pages Options

Frequency [STORE VIEW]

Priority [STORE VIEW]
▲ Valid values range from 0.0 to 1.0.

CMS Pages Options

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

Step 2: Complete the Generation Settings

1. Expand ☺ the **Generation Settings** section.

▼ Generation Settings

Enabled [STORE VIEW]

Start Time : : [STORE VIEW]

Frequency [STORE VIEW]

Error Email Recipient [STORE VIEW]

Error Email Sender [WEBSITE]


Error Email Template [WEBSITE]

Generation Settings

2. To generate a sitemap, set **Enabled** to “Yes.” Then, do the following:
 - a. Set **Start Time** to the hour, minute and second that you want the sitemap to be updated.
 - b. Set **Frequency** to one of the following:

- Daily
 - Weekly
 - Monthly
- c. In the **Error Email Recipient** field, enter the email address of the person who is to receive notification if an error occurs during a sitemap update.
 - d. Set **Error Email Sender** to the store contact who appears as the sender of the error notification.
 - e. Set **Error Email Template** to the template used for the error notification.


Step 3: Set the Sitemap File Limits

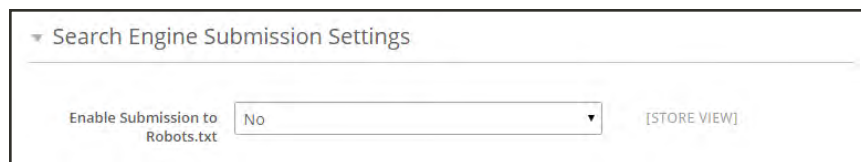
1. Expand  the **Sitemap File Limits** section. Then, do the following:
 - a. In the **Maximum No of URLs per File** field, enter the maximum number of URLs that can be included in the sitemap. By default, the limit is 50,000.
 - b. In the **Maximum File Size** field, enter the largest size in bytes that is allocated for the sitemap. The default size is 10,485,760 bytes.



Sitemap File Limits

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.”



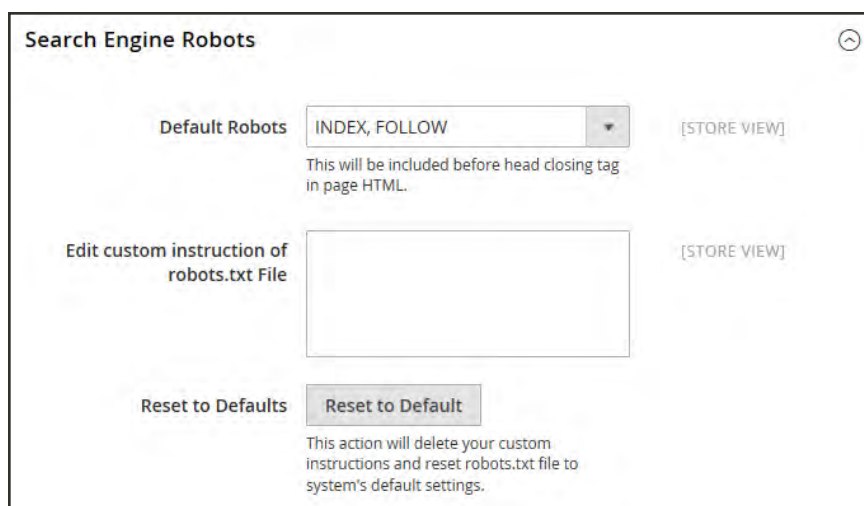
Search Engine Submission Settings

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.



Search Engine Robots

To configure robots.txt:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand ☺ the **Search Engine Robots** section. Then, do the following:
 - a. Set **Default Robots** to one of the following:

INDEX, FOLLOW	Instructs web crawlers to index the site and to check back later for changes.
NOINDEX, FOLLOW	Instructs web crawlers to avoid indexing the site, but to check back later or changes.

INDEX, NOFOLLOW	Instructs web crawlers to index the site once, but to not check back later for changes.
NOINDEX, NOFOLLOW	Instructs web crawlers to avoid indexing the site, and to not check back later for changes.

- b. If needed, enter custom instructions into the **Edit Custom instruction of robots.txt file** box: For example, while a site is in development, you might want to disallow access to all folders.
 - c. To restore the default instructions, tap **Reset to Default**.
4. When complete, tap **Save Config**.

Examples of Custom Instructions

Allows Full Access

```
User-agent:*
Disallow:
```

Disallows Access to All Folders

```
User-agent:*
Disallow: /
```

Default Instructions

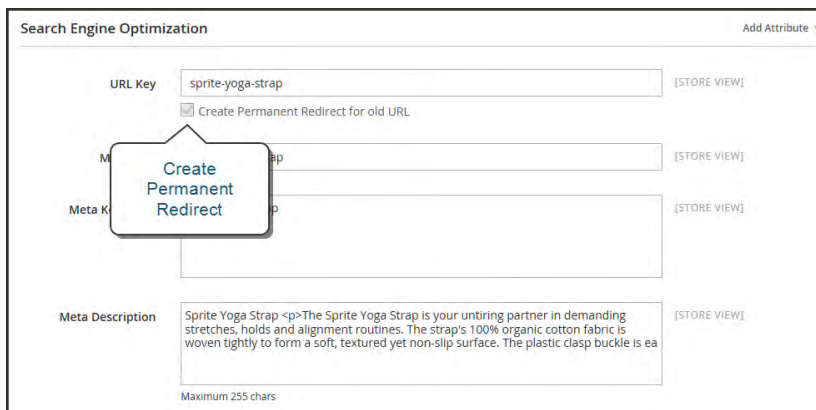
```
Disallow: /lib/
Disallow: /*.php$
Disallow: /pkginfo/
Disallow: /report/
Disallow: /var/
Disallow: /catalog/
Disallow: /customer/
Disallow: /sendfriend/
Disallow: /review/
Disallow: /*SID=
```

CHAPTER 29:

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.



Search Engine Optimization Add Attribute ▾

URL Key [STORE VIEW]

Create Permanent Redirect for old URL

Meta Title [STORE VIEW]

Meta Keywords [STORE VIEW]

Meta Description [STORE VIEW]
Maximum 255 chars

Create Permanent Redirect for Old URL

URL Rewrite Configuration

URL rewrites make it possible to make existing URLs more “search engine friendly” and also easier for humans to read. Enabling Web Server Apache Rewrites is part of the initial Magento setup. Magento routinely uses URL rewrites to remove the file name “index.php” that normally appears in the URL just after the root folder. When Web Server Rewrites are enabled, the system rewrites each URL to omit “index.php.” The rewrite removes words that convey nothing of value to search engines or customers, and has no impact on performance or site rank.


URL without Web Server Rewrite

```
http://www.yourdomain.com/magento/index.php/storeview/url-identifier
```

URL with Web Server Rewrite

```
http://www.yourdomain.com/magento/storeview/url-identifier
```

To enable URL rewrites:

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



Search Engine Optimization 

Use Web Server Rewrites  [STORE VIEW]

Search Engine Optimization

4. Set **Use Web Server Rewrites** to “Yes.”
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 changes. In the Search Engine Optimization section of the product record, the checkbox below the URL key indicates if permanent redirects are enabled for your catalog. If your store is already configured to automatically redirect catalog URLs, making a redirect is as easy as updating the URL key.

The screenshot shows the 'Search Engine Optimization' section of a product record. It includes a 'URL Key' field with the value 'sprite-yoga-strap' and a '[STORE VIEW]' link. Below it is a checkbox labeled 'Create Permanent Redirect for old URL' which is checked. A callout box with a blue border and white background points to this checkbox, containing the text 'Create Permanent Redirect'. Other fields include 'Meta Title', 'Meta Keywords', and 'Meta Description' (with a character limit of 255).

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

Popular Search Terms	Enable	[STORE VIEW]
Product URL Suffix	.html	[STORE VIEW]
	<small>▲ You need to refresh the cache.</small>	
Category URL Suffix	.html	[STORE VIEW]
	<small>▲ You need to refresh the cache.</small>	
Use Categories Path for Product URLs	No	[STORE VIEW]
Create Permanent Redirect for URLs if URL Key Changed	Yes	[STORE VIEW]
Page Title Separator	-	[STORE VIEW]
Use Canonical Link Meta Tag For Categories	No	[STORE VIEW]
Use Canonical Link Meta Tag For Products	No	[STORE VIEW]

Search Engine Optimization

To automatically redirect catalog URLs:

1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find the product in the list, and click to open the record.
3. In the panel on the left, choose **Search Engine Optimization**.
4. In the **URL Key** field, do the following:
 - a. Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, follow the instructions to [enable automatic redirects](#).
 - b. Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
5. When complete, tap **Save**.
6. When prompted to refresh the cache and index, follow the links in the messages that appear at the top of the workspace. The permanent redirect is now in effect for the product and any associated category URLs.
7. To view the redirect records, do the following:
8. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**. The most recent permanent redirects appear at the top of the list.

Creating URL Rewrites

The URL Rewrite tool can be used to create product and category rewrites, and custom rewrites for any page in your store. When the rewrite goes into effect, any existing links that point to the previous URL are seamlessly redirected to the new address.

URL rewrites can be used to add high-value keywords to improve the way the product is indexed by search engines. You can also use rewrites to create additional URLs for a temporary seasonal change, or permanent change. Rewrites can be created for any valid path, including CMS content pages. Internally, the system always references products and categories by their ID. No matter how often the URL changes, the ID remains the same. Here are some ways you can use URL rewrites:

System URL

```
http://www.example.com/catalog/category/id/6
```

Original URL

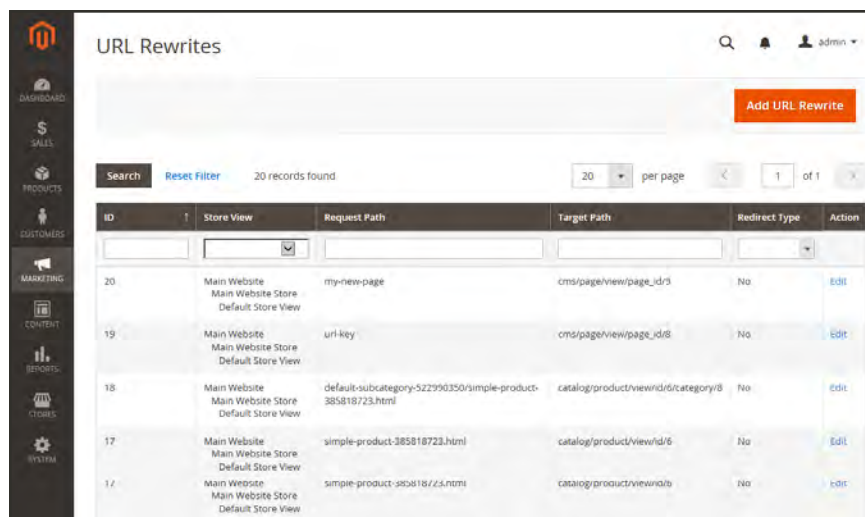
```
http://www.example.com/peripherals/keyboard.html
```

Redirected Product URL

```
http://www.example.com/ergonomic-keyboard.html
```

Additional Category URLs

```
http://www.example.com/all-on-sale.html
http://www.example.com/save-now/spring-sale
```



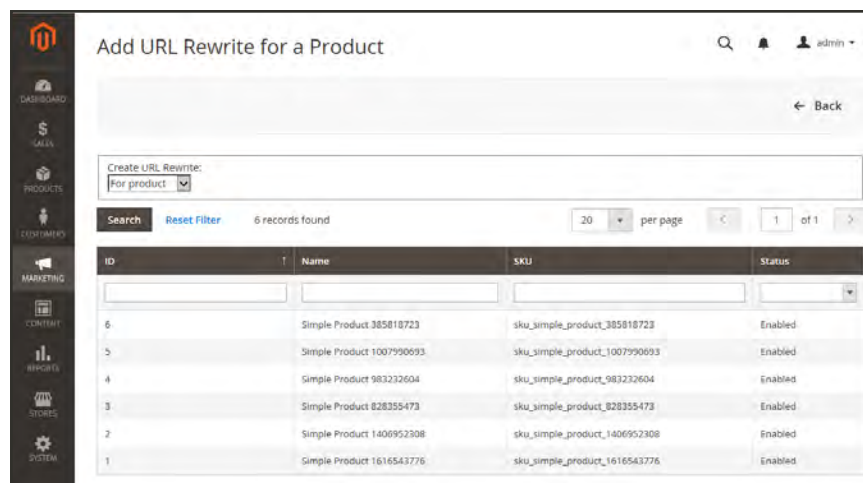
URL Rewrites

Product Rewrites

Before you begin, you should know exactly what you want the redirect to accomplish. To prevent mistakes, it might help to write down the paths as “from” and “to.”

From The Target Path displays the internal URL that is used by the system, with the product ID. It is entered automatically, and grayed out.

To Although the Request Path initially displays the current URL, it represents the path that you are requesting.



Add URL Rewrite for Product

Process Overview:

Step 2: **Create the Rewrite**

Step 3: **Refresh the Index**

Step 4: **Test the Result**

Step 1: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **Search & SEO**, choose **URL Rewrites**.
2. In the upper-right corner, tap **Add URL Rewrite**.
3. Set **Create URL Rewrite** to “For product.”
4. In the grid, find the product to be redirected. Then, open the record in edit mode.
5. Below the category tree, tap **Skip Category Selection**.

In the URL Rewrite Information, the current product URL appears as the Request Path. The Target Path contains the internal URL that is used by the system. It is grayed out and cannot be changed.

- a. If you have multiple store views, set **Store** to the view where the rewrite applies.
- b. In the **Request Path** field, enter the new URL key and suffix, if applicable, for the product.
- c. Set **Redirect** to one of the following:
 - Temporary (302)
 - Permanent (301)
- d. For your own reference, enter a brief **Description** of the rewrite.

URL Rewrite Information

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

Your new product rewrite now appears at the top of the list.

Step 2: Refresh the Index

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Select the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data.” Then, tap **Submit**.

Step 3: Test the Result

Test the rewrite from your store to make sure that it works correctly.

Field Descriptions

FIELD	DESCRIPTION
Create URL Rewrite	<p>Indicates the type of rewrite to be made. The type cannot be changed after the rewrite is created. Options:</p> <ul style="list-style-type: none"> For Category For Product Custom
Request Path	<p>The path where the product is to be redirected. Depending on your configuration, the Request Path might include the .html suffix and category. A Request Path must be unique, and cannot be in use by another redirect. If you have made several attempts to redirect the same page, delete any unsuccessful redirects and refresh the cache. For example:</p> <pre> brandname brand/brandname catalog/category/view/id/56 private-sale-shoes/prima-pump.html brand/brandname.html </pre>
Target Path	<p>The internal path used by the system that points to the product. To avoid getting a 404 "Page Not Found" error, the target path must exactly match what the system expects to find.</p>
Redirect	<p>Indicates whether the rewrite is temporary or permanent. Options :</p> <ul style="list-style-type: none"> No No redirect is specified. Temporary (302) Indicates to search engines that the rewrite is for a limited time. Search engines do not preserve page rank information for temporary rewrites. In the URL Rewrite grid, temporary redirects are identified by the letter "R" in the Options column. Permanent (301) Indicates to search engines that the rewrite is permanent. Search engines generally preserve page rank information for permanent rewrites.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Description	In the URL Rewrite grid, permanent redirects are identified by the letters "RP" in the Options column. Describes the purpose of the rewrite. This field is for reference and is not visible to customers.

Category Rewrites

If a category changes, or no longer exists, you can use a category rewrite to redirect links that point to the previous category to another URL.

Stores that are configured to include categories in the URL key have multiple URLs that point to the same product. To manage the multiple paths for SEO, see: [Canonical Meta Tag](#).

Process Overview:

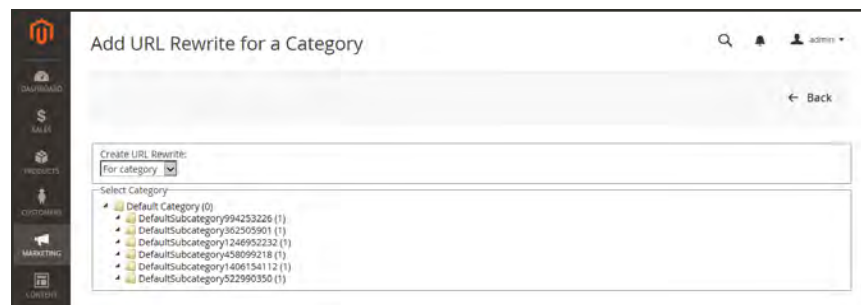
Step 1: [Create the Rewrite](#)

Step 2: [Refresh the Index](#)

Step 3: [Test the Result](#)

Step 1: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. In the upper-right corner, tap **Add URL Rewrite**.
3. Set **Create URL Rewrite** to “For category.” Then in the category tree, choose the category that is to be redirected.



URL Rewrite for Category

4. In the URL Rewrite section, do the following:
 - a. If you have multiple stores, select the **Store** where the rewrite applies.
 - b. In the **Request Path** field, enter the URL key of the category to be redirected.
 - c. Set **Redirect** to one of the following:
 - Temporary (302)
 - Permanent (301)
 - d. For your own reference, enter a brief description of the rewrite.

Select Category

5. When complete, tap **Save** button.
Your new category rewrite now appears at the top of the list of rewrites.
6. Test the rewrite from your store, to make sure that it works correctly.

Step 2: Refresh the Index

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Mark the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data,” and tap **Submit**.

Step 3: Test the Result

Test the redirect from your store, to make sure that it works correctly. Make sure that the URL you test goes directly to the intended category, rather than to a subcategory. For example:

```
http://yourstore.com/catalog/category/view/id/56
http://yourstore.com/catalog/category/view/s/my-category/id/56/
```

CMS Page Rewrites

You can redirect the URLs of content pages, as well as other pages. For example, if you change the URL key of the privacy policy from `privacy-policy-cookie-restriction-mode` to `privacy-policy`, the link in the **cookie restriction mode** returns “404 - Page Not Found.” To redirect traffic to the new URL key, create a custom rewrite with the following settings:

Request Path: `privacy-policy-cookie-restriction-mode`
 Target Path: `privacy-policy`
 Redirect: Permanent (301)

Process Overview:

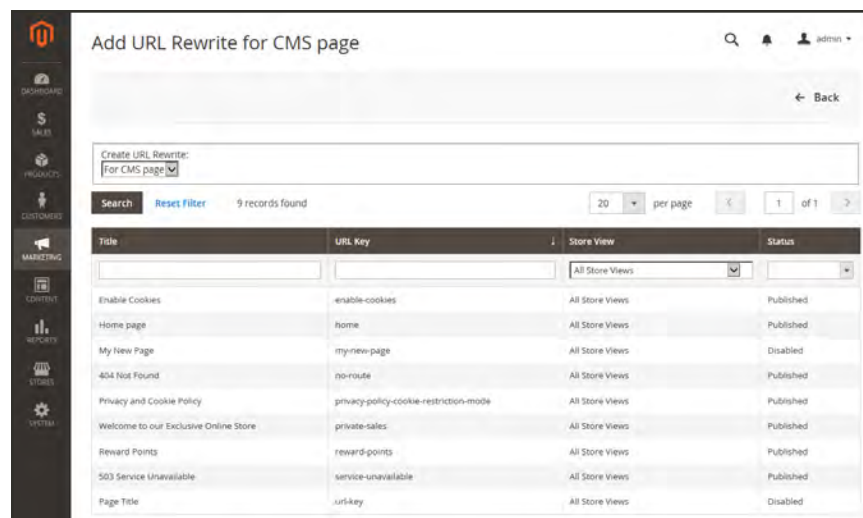
Step 1: **Create the Rewrite**

Step 2: **Refresh the Index**

Step 3: **Test the Result**

Step 1: Create the Rewrite

1. On the Admin sidebar, tap **Marketing**. Then under **SEO & Search**, choose **URL Rewrites**.
2. In the upper-right corner, tap **Add URL Rewrite**.
3. Set **Create URL Rewrite** to “for CMS page.”
4. Find the page that you want to redirect in the grid, and open the record.



Custom URL Rewrite

5. Under URL Rewrite Information, do the following:
 - a. If you have multiple store views, select the **Store** where the rewrite applies.
 - b. In the **Request Path** field, enter the URL key, of the CMS page to be redirected.
 - To redirect to another CMS page in your store, enter the relative path, without a leading forward slash.
 - To redirect to a page on a different site, enter the fully qualified URL of the destination.
 - c. Set **Redirect to** to one of the following:
 - Temporary (302)
 - Permanent (301)
 - d. For your own reference, enter a brief description of the rewrite.

URL Rewrite Information

6. When complete, tap **Save**.
The new rewrite appears in the grid at the top of the list.

Step 2: Refresh the Index

1. On the Admin sidebar, tap **System**. Then under **Tools**, choose **Index Management**.
2. Mark the **Catalog URL Rewrites** checkbox.
3. Set the **Actions** control to “Reindex Data,” and tap **Submit**.

Step 3: Test the Result

Test the rewrite from your store to make sure that it works correctly.



CHAPTER 30:

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 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.

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. If you want to conduct A/B testing and other performance tests on your content, set **Content Experiments** to “Yes.”
 - c. Enter your Universal Analytics **Account Number**.

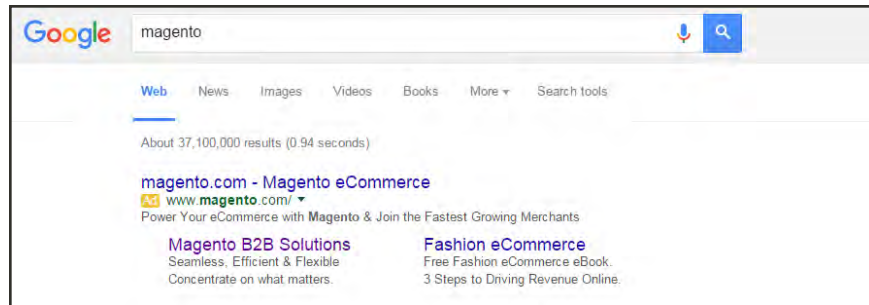
Google Analytics		[STORE VIEW]
Enable	Yes	[STORE VIEW]
Account Number		[STORE VIEW]
Enable Content Experiments	No	[STORE VIEW]

Google Analytics

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

Google Adwords

Google Adwords is a service that is used to place ads in Google Search results, with tools to manage the campaigns.



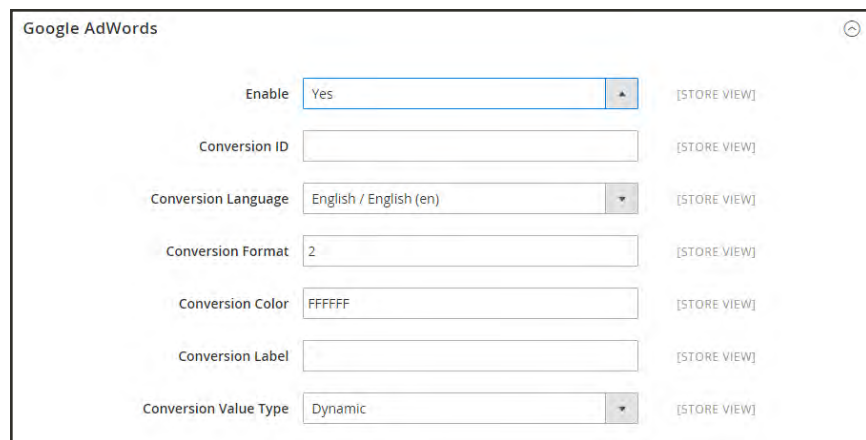
Magento Ad in Google Search Results

Step 1: Sign Up for Google Adwords

Visit [Google Adwords](#), and sign up for an account.

Step 2: Configure Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Google API**.
3. Expand ☺ the **Google Adwords** section. Then, do the following:



Google Adwords

- a. Set **Enable** to “Yes.”
- b. Enter the **Conversion ID** from your Google AdWords script.

CONTENT

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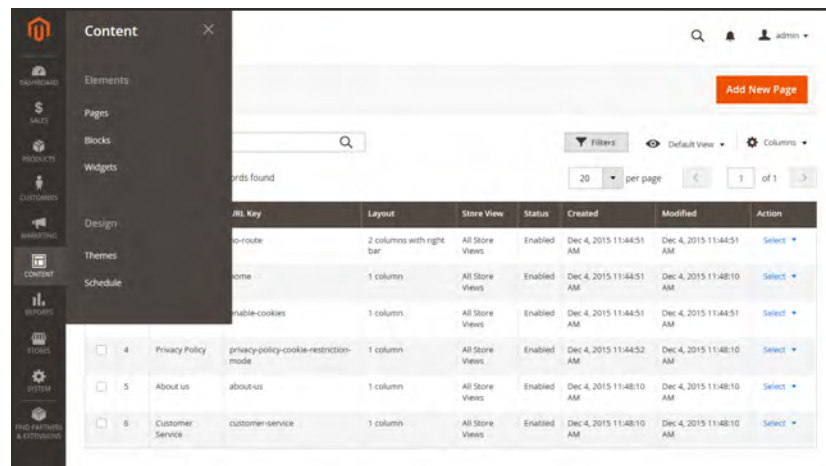
 - New Products List

CHAPTER 31:

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

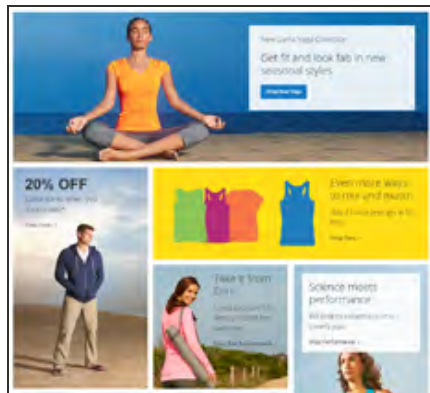
¹The art of promoting products or services by providing valuable information at no charge.

Menu Options



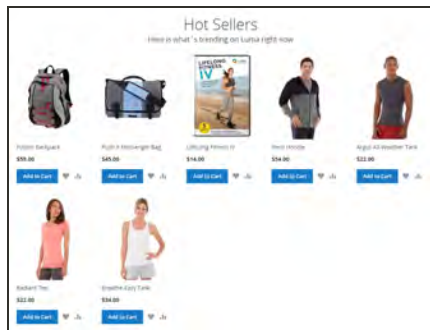
Pages

Create pages with text, images, blocks, variables, and widgets, that can be incorporated into the navigation of your store, and linked to other pages..



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.



Widgets

Display dynamic data and add blocks, links, and interactive elements most anywhere in your store.



CHAPTER 32:

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.

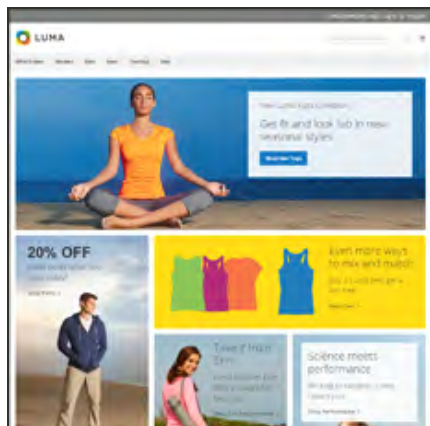
Content with a long shelf life is sometimes referred to as **evergreen content**¹. Examples of evergreen content include customer success stories, "how to" instructions, and Frequently Asked Questions (FAQ.) In contrast, content is perishable by nature includes events, industry news, and press releases.

¹Content that has a long shelf life.

Core Content

The Magento demo store has examples of core content pages to help you get started. Take a look at the following pages in your store, to make sure that the content conveys your message, voice, and brand.

Content Pages



Home

The demo “Home” page includes a banner, an image carousel, several static blocks with links, and a list of new products.



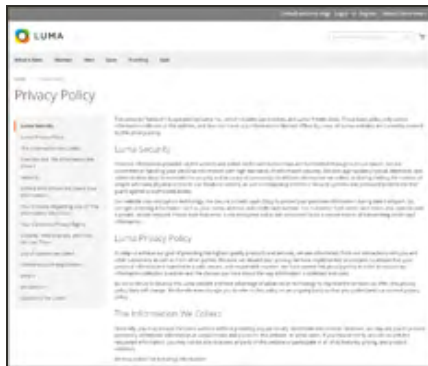
About Us

The “About Us” page is linked from the footer of your store. You can include images, video, links to press releases and announcements. The sample page has an image on the right, and one of a decorative sort to indicate the end of the page.



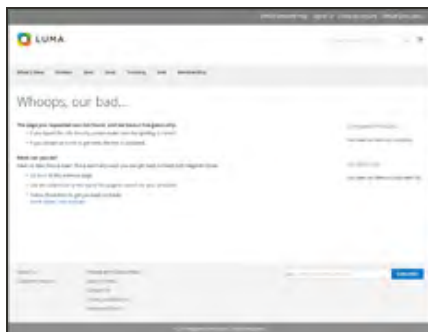
Customer Service

The “Customer Service” page is another node in the page hierarchy. The two headers on the page have content that only becomes visible when the header is clicked.



Privacy Policy

Your store’s “Privacy Policy” page should be updated with your own information. As a best practice, your privacy policy should explain to your customers the type of information that your company collects and how it is used.



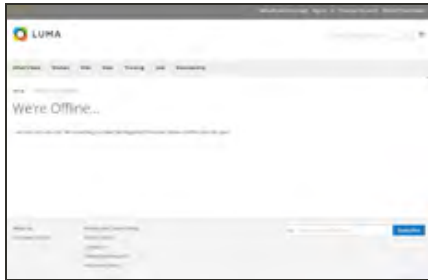
Page Not Found

The “404 Page Not Found” page is named for the response code that is returned when a page cannot be found. URL redirects reduce the number of times that this page appears. However, for those times when it is necessary, you might as well take advantage of the opportunity to offer some links to products that the customer might find interesting.



Enable Cookies

The “Enable Cookies” page appears when visitors to your site do not have cookies enabled in their browsers. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.



Service Unavailable

The “503 Service Unavailable” page is named for the response code that is returned when the server is unavailable.

Default Pages

The Default Pages configuration determines the landing page 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		
Default Web URL	<input type="text" value="cms"/>	[STORE VIEW]
CMS Home Page	<input type="text" value="Home page"/>	[STORE VIEW]
Default No-route URL	<input type="text" value="cms/noroute/index"/>	[STORE VIEW]
CMS No Route Page	<input type="text" value="404 Not Found"/>	[STORE VIEW]
CMS No Cookies Page	<input type="text" value="Enable Cookies"/>	[STORE VIEW]
Show Breadcrumbs for CMS Pages	<input type="text" value="Yes"/>	[STORE VIEW]

Default Pages

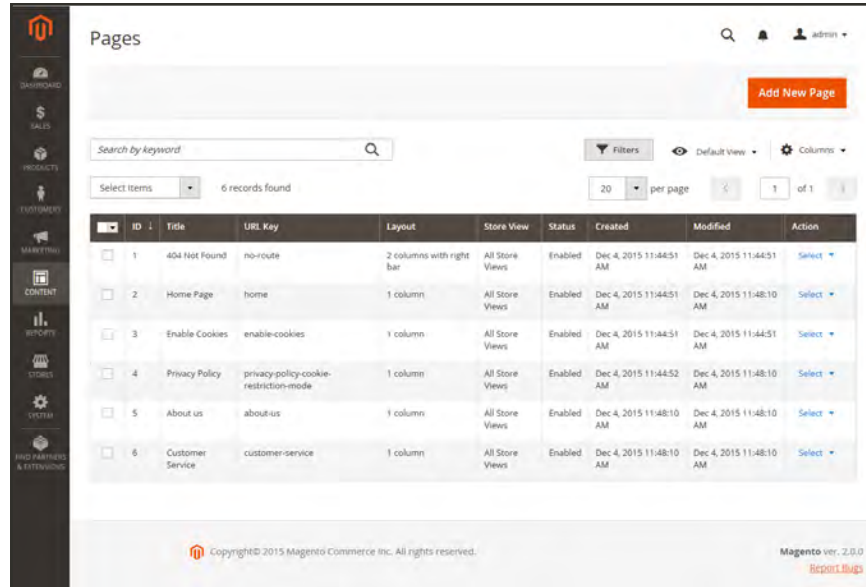
- a. In the **Default Web URL** field, enter the relative path to the folder in the Magento installation that contains the landing page. The default value is “cms.”

For a specific store view, clear the **Use Default** checkbox next to the Default Web URL field, and any other default fields to be changed.

- b. Set **CMS Home Page** to the CMS page to be used as the home page.
 - c. In the **Default No-route URL** field, enter the relative path to the folder in the Magento installation where the page is redirected when a “404 Page Not Found” error occurs. The default value is “cms/index/noRoute.”
 - d. Set **CMS No Route Page** to the CMS page that appears when a “404 Page Not Found” error occurs.
 - e. Set **CMS No Cookies Page** to the CMS page that appears when cookies are disabled in the browser.
 - f. If you want a breadcrumb trail to appear at the top of all CMS pages, set **Show Breadcrumbs for CMS Pages** to “Yes.”
4. When complete, tap **Save Config**.

Workspace Controls

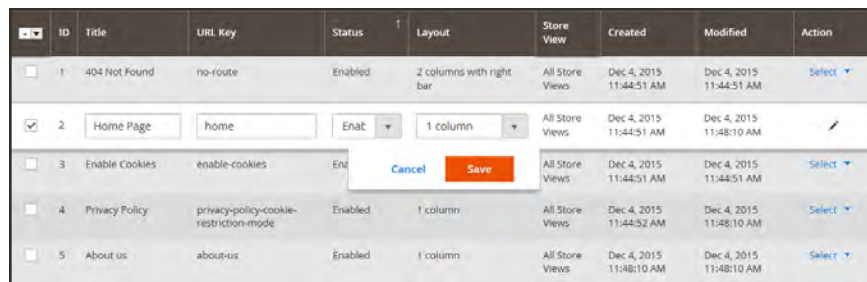
The Pages workspace includes tools to help you quickly find the pages you need, and commands to perform routine maintenance on individual or multiple pages. You can also quickly update page properties from the grid.



Pages Grid

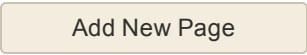
To quickly update page properties:

1. Double-click any page in the grid;
2. Update any of the following properties:
 - Title
 - URL Key
 - Status
 - Layout
3. When complete, tap **Save**.

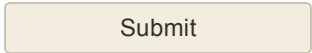


Update Page Properties

Workspace Controls

CONTROL	DESCRIPTION
Store View	Sets the scope to a specific view.
	Adds a new page.
Search	Initiates a catalog search based on the current filters.
Reset Filter	Restores all filters to a blank state.
Actions	Lists all actions that can be applied to selected items in the list. To apply an action to a page, or to multiple pages, mark the checkbox in the first column of each record that is subject to the action. Options: Delete Change Status Update Attributes

Workspace Controls (cont.)

CONTROL	DESCRIPTION
Select	Can be used to select multiple records as the target of action. The checkbox is marked in the first column of each selected record. Options: Select All / Deselect All
	Applies the current action to selected records.
Edit	Opens the record in edit mode. You can accomplish the same thing by clicking anywhere on the row.

Columns

COLUMN	DESCRIPTION						
Select	The checkbox in the first column is used to apply the following actions to specific or multiple pages: Delete Disable Enable						
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: Disabled / Published						
Created	The date the page was created.						
Modified	The data the page was last modified.						
Version Control	Indicates if the page is maintained under version control. Options: Yes / No						
Action	The actions that can be applied to an individual record include: <table border="0"> <tr> <td>Edit</td> <td>Opens the page in edit mode.</td> </tr> <tr> <td>Delete</td> <td>Deletes the page.</td> </tr> <tr> <td>Preview</td> <td>Displays the page in preview mode.</td> </tr> </table>	Edit	Opens the page in edit mode.	Delete	Deletes the page.	Preview	Displays the page in preview mode.
Edit	Opens the page in edit mode.						
Delete	Deletes the page.						
Preview	Displays the page in preview mode.						

Page Search


The Search box in the upper-left of the page grid can be used to find specific pages by keyword. For a more advanced search, you can filter the search by multiple parameters.

The screenshot shows the 'Pages' management interface in the Magento 2.0 Admin Panel. A search box at the top left contains the text 'Home Page'. Below the search box, the active filters are listed as 'Keyword: Home Page'. The results table shows three records found, with the following data:

ID	Title	URL Key	Layout	Store View	Status	Created	Modified	Action
1	404 Not Found	no-route	2 columns with right bar	All Store Views	Enabled	Dec 4, 2015 11:44:51 AM	Dec 4, 2015 11:44:51 AM	Select
2	Home Page	home	1 column	All Store Views	Enabled	Dec 4, 2015 11:44:51 AM	Dec 4, 2015 11:48:10 AM	Select
4	Privacy Policy	privacy-policy-cookie-restriction-mode	1 column	All Store Views	Enabled	Dec 4, 2015 11:44:52 AM	Dec 4, 2015 11:48:10 AM	Select

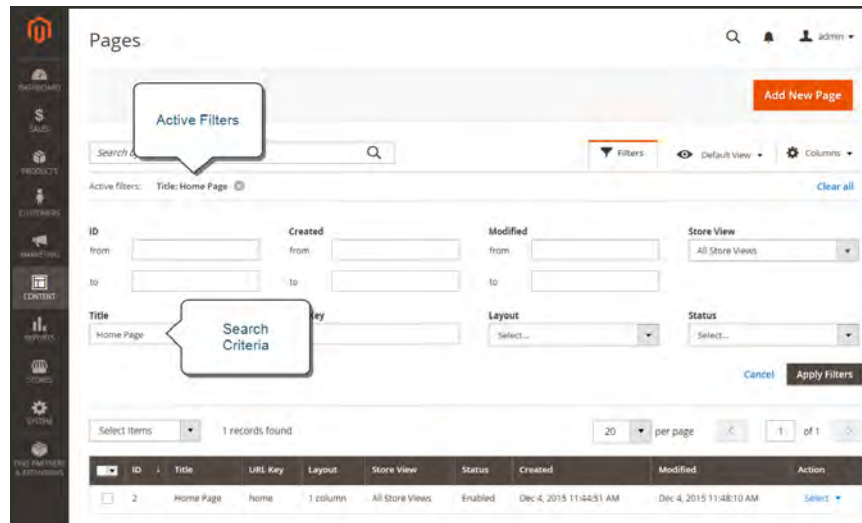
Keyword Search Results

To search by keyword:

1. Enter a search term into the page search box.
2. Tap **Search**  to display the results.

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*

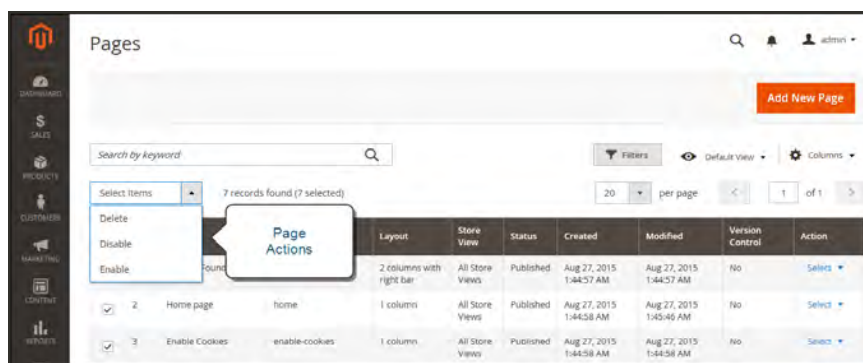
Search Filters

FILTER	DESCRIPTION
ID	Filter the search by page record ID.
URL Key	Filter the search by the URL Key.
Version Control	Filter the search on the basis of version control: Yes / No
Created	Filter the search by the date the page was created.
Layout	Filter the search based on page layout. Options: 1 column 2 columns with left bar 2 columns with right bar 3 columns Empty
Modified	Filter the search based on the date the page was last modified.
Store View	Filter the search based on store view. Options: (All available Store Views)
Title	Filter the search based on the page title.
Status	Filter the search on the page status. Options: Disables / Published
<input type="button" value="Apply Filters"/>	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

Page Actions

The following actions can be applied to selected pages. To select individual pages, mark the checkbox in the first column. To select or deselect all pages, use the control at the top of the column.

- Delete
- Disable
- Enable

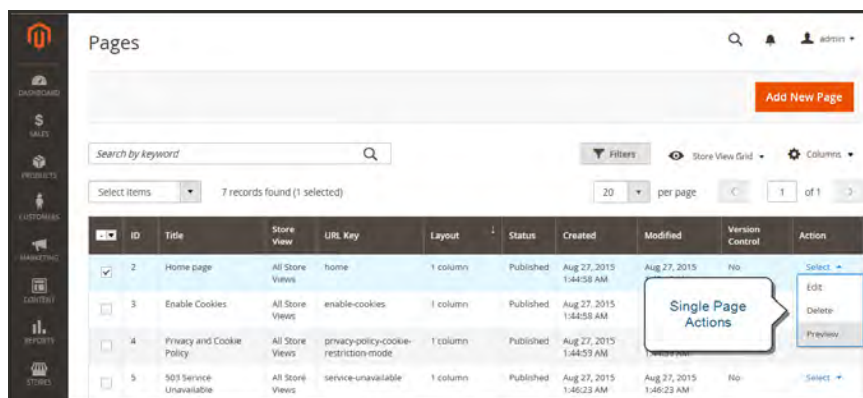


Page Actions

Applying Actions

The Action column on the far right can be used to apply any of the following actions to the individual page:

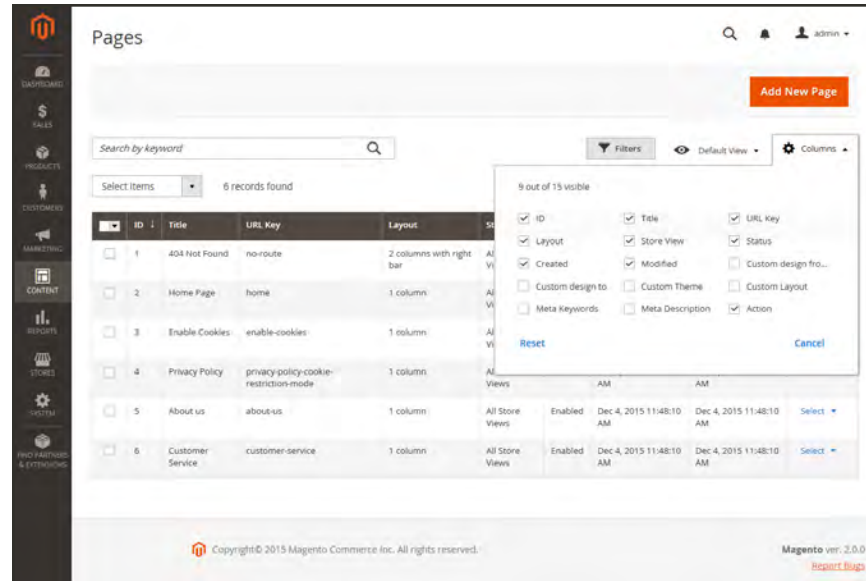
- Edit
- Delete
- Preview.



Single Page Actions

Page Grid Layout

The selection of columns and their order in the grid can be changed according to your preference. To keep the new column arrangement, you can save it as a view.



Page Grid Columns

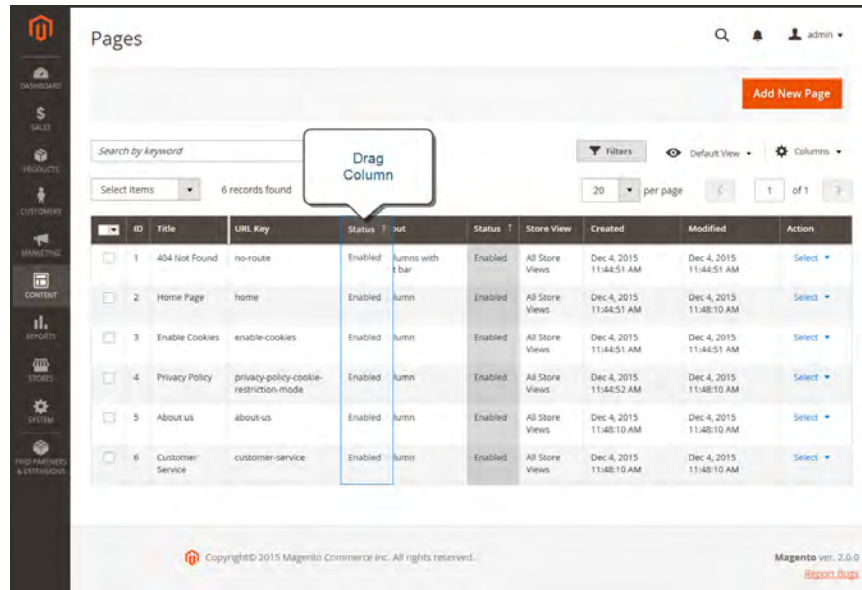
To change the selection of columns:

In the upper-right corner, tap the **Columns** ⚙ control. Then, do the following:

- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

To move a column:

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

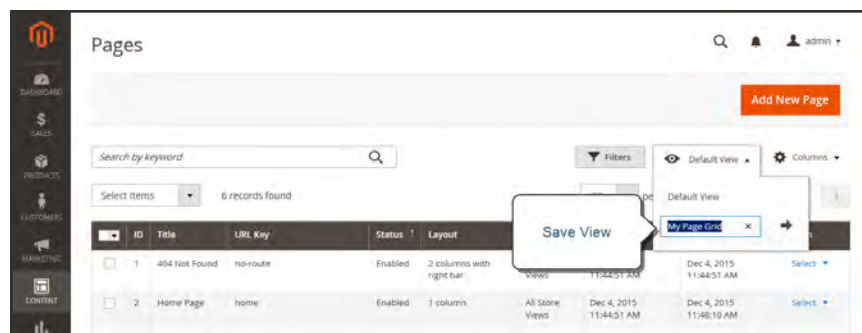


Moving a Column

To save a view:

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


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

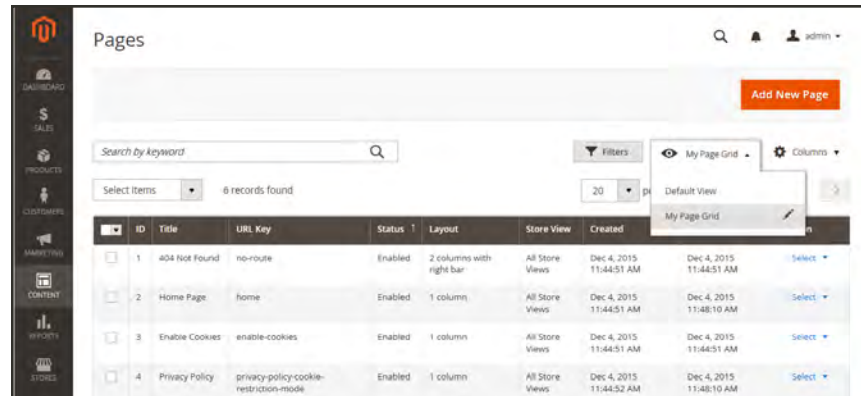


Save Current View

To change the view:

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

- Choose the view that you want to use.
- To change the name of a view, tap the **Edit**  icon. Then, update the name.

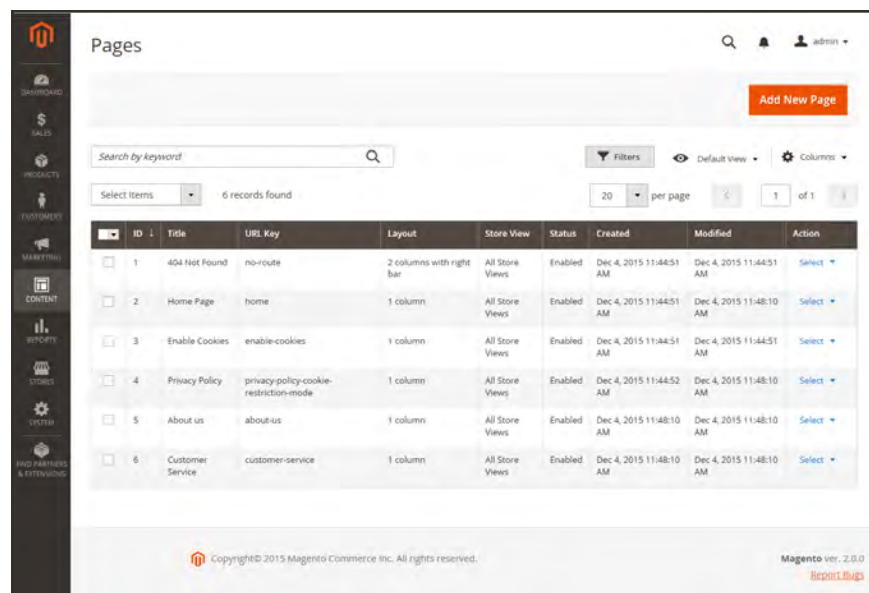


Choose a View

Adding a New Page

The process of adding a new content page to your store is essentially the same for any type of page you might want to create. You can include text, images, blocks of content, variables, and frontend apps. Most content pages are designed to be read by search engines first, and by people second. Keep the needs of each of these two very different audiences in mind when choosing the page title and URL, composing the meta data, and writing the content.

The following instructions walk you through each step to create a basic page. Some advanced features are skipped over, but covered in other topics. Each is marked as “Advanced,” with a link to learn more.



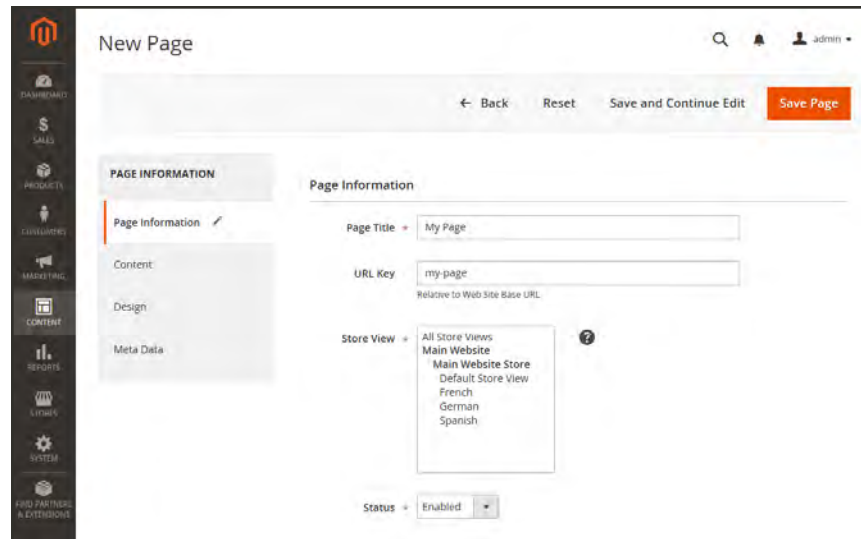
Pages

Process Overview:

- Step 1: [Add a New Page](#)
- Step 2: [Select the Page Layout](#)
- Step 3: [Complete the Content](#)
- Step 4: [Complete the Meta Data](#)
- Step 5: [Preview the Page](#)
- Step 6: [Publish the Page](#)

Step 1: Add a New Page

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Pages**.
2. Tap **Add New Page**.



Page Information

3. In the Page Information section, do the following:
 - a. Enter the **Page Title**. The Page Title is meta data that appears in the title bar and tab of the browser.
 - b. Enter a **URL Key** for the page, using lowercase characters, and hyphens instead of spaces.
The URL Key is added to the base URL to create the online address of the page.
 - c. In the **Store View** list, select each view where this page is to be available.
 - d. Set **Status** to “Disabled.” (You can change this later when the page is ready to go live.)
 - e. (Advanced) Version control maintains an archive of all page revisions. To learn more, see: .
4. Tap **Save and Continue Edit**.

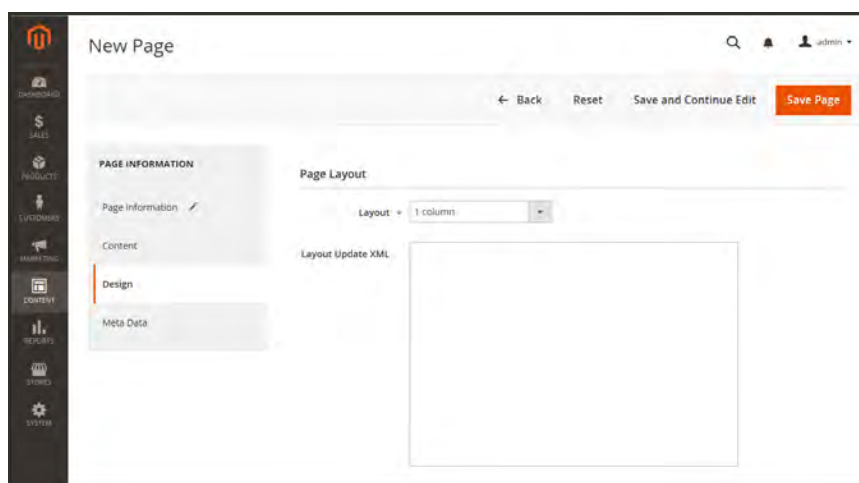
Step 2: Choose the Page Layout

1. In the panel on the left, choose **Design**.
2. In the Page Layout section, set **Layout** to one of the following:

- 1 column
- 2 columns with left bar
- 2 columns with right bar
- 3 columns

To learn more, see: [Page Layout](#).

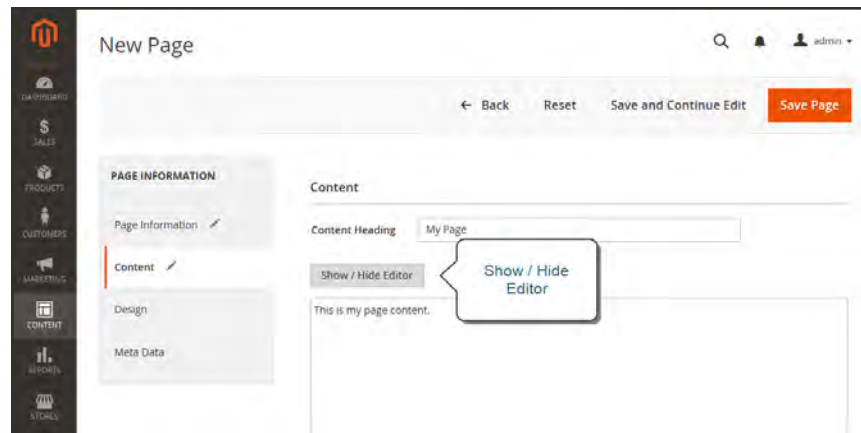
3. (Advanced) Custom page layouts are used to make custom modifications to the page layout. To learn more, see: [Layout Updates](#).
4. (Advanced) The Custom Design section can be used to change the theme, layout, or style of the page for period of time, such as for a season or promotion. To learn more, see: [Custom Design](#).



Page Layout

Step 3: Complete the Content

1. In the panel on the left, choose **Content**.
2. In the **Content Heading** box, type the text for the main heading at the top of the page.
3. You can work in either of the following modes:
 - If you prefer to use the WYSIWYG editor, tap **Show / Hide Editor**. To learn more, see: [Using the Editor](#).
 - If you prefer to work directly with the HTML, tap **Show / Hide Editor** again to return to code view.
4. Complete the content and format the text as needed. You can add images, variables, and a variety of **frontend apps** with dynamic data.



Show / Hide Editor

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

Step 4: Complete the Meta Data

1. In the panel on the left, choose **Meta Data**.
2. Complete the **Keywords** and **Description** for the page. This information helps search engines to index the page.
3. Tap **Save and Continue Edit**.

Step 5: Preview the Page

1. To proofread the page and check the formatting, tap **Preview** at the top of the workspace.
2. The preview opens in a new browser tab. To return to your work, either close the preview tab, or switch to the tab that is open to the Admin of your store.

Step 6: Publish the Page


1. When you are ready to publish the page, do the following:
 - a. In the panel on the left, choose **Page Information**.
 - b. Set **Status** to “Published.”
2. Tap **Save Page**.

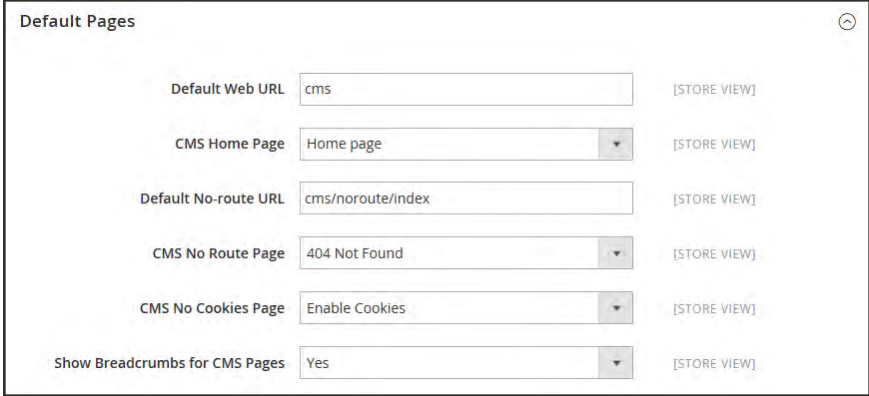
Now that your page is complete, it can be added to your store navigation, linked to other pages, or from the footer of your store. You can also use it as your new home page.

Assigning a New Home Page

You can maintain a selection of different home pages, and activate the page that you want to use as the default home page.

To Assign a New 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:



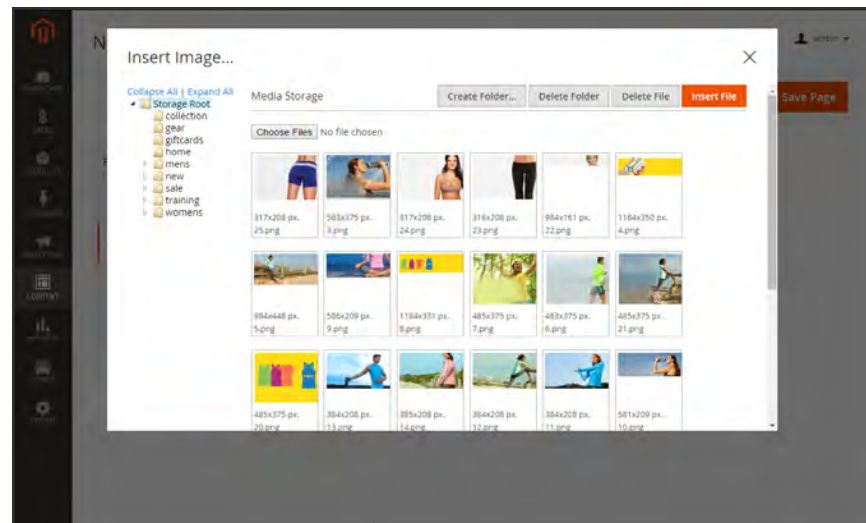
Setting	Value	Action
Default Web URL	cms	[STORE VIEW]
CMS Home Page	Home page	[STORE VIEW]
Default No-route URL	cms/noroute/index	[STORE VIEW]
CMS No Route Page	404 Not Found	[STORE VIEW]
CMS No Cookies Page	Enable Cookies	[STORE VIEW]
Show Breadcrumbs for CMS Pages	Yes	[STORE VIEW]

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, the files can be managed in a **database**, or located on a separate server or **content delivery network**.



Media Storage

To upload an image to media storage:

1. In the directory tree on the left, navigate to the folder where the image will be stored. If necessary, press the right mouse button, and create any new folders that are needed.
2. From the **editor**, do the following:
 - a. Tap **Browse Files**. Navigate to the file on your computer, and select it. Then, tap **Open** to copy the file name to Media Storage.
 - b. Tap **Upload File** to upload the the image to Media Storage.
3. To link the image to a file, click to select the image. Then, tap **Insert File**.
4. To complete the **Alt** tag, place the cursor between the double-quotes, and enter the alt text.
5. To see the image in WYSIWYG mode, tap **Show / Hide Editor**.

Using the Editor

The WYSIWYG editor gives you the ability to enter and format while working in a “What You See Is What You Get” view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for pages, blocks, and product descriptions. When working in the product catalog, the editor is accessed by clicking the WYSIWYG Editor button.

For a complete list of toolbar buttons, see: [Using the Editor](#) in the online guide.



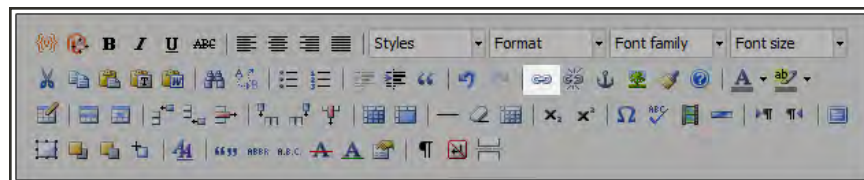
Editor Toolbar

Inserting a Link

An easy way to insert a link is to use the Link button in the editor toolbar. It doesn't require any knowledge of HTML, and the result is the same.

To insert a link:

1. Highlight the text where you want to create the link. Then, in the editor toolbar, tap the **Link** button.



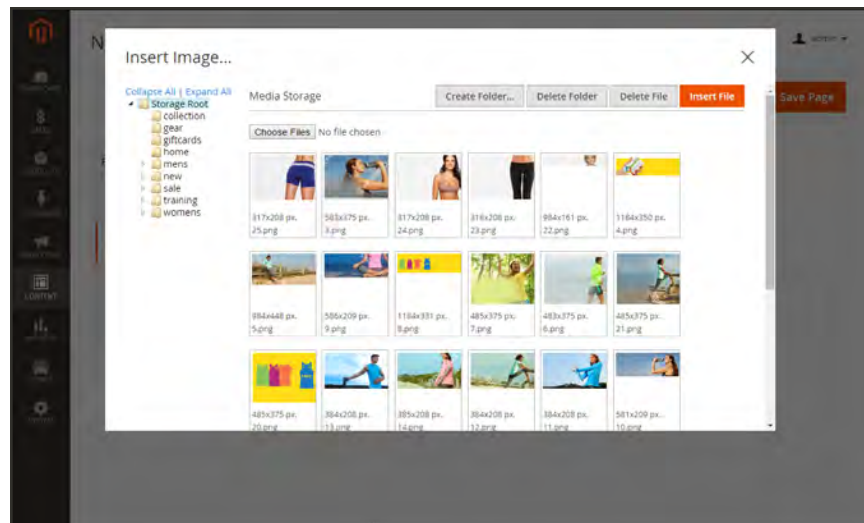
Insert Link Button

2. In the **Link URL** field, enter one of the following:
 - The **URL Key** of a page in your store.
 - The full **URL** of an external page to be linked.
3. Set **Target** to one of the following:
 - Open link in the same window
 - Open in a new window
4. In the **Title** field, enter the tooltip text to appear when someone hovers over the link.

5. Tap **Insert** to create the link.

Inserting an Image

From the editor, you can insert an image that has been uploaded to **Media Storage**, or link to an image that resides on another server.



Media Storage

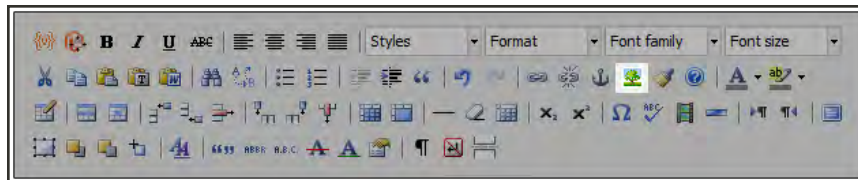
Method 1: Insert an Image from Media Storage

1. If necessary, tap **Show / Hide Editor** to work directly with the code.
2. Position the cursor where you want the code for the image to be inserted. Then, tap **Insert Image**.
3. Choose the image that you want to use, and tap **Insert File**.
4. To view the image in WYSIWYG mode, tap **Show / Hide Editor** again.

Method 2: Insert an Image from Another Server

Use this method to insert an image that is available online, but resides on another server. You must have the full URL of the image to complete the process.

1. If necessary, tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position your cursor where you want the image to appear.
3. On the Editor toolbar, tap the **Insert Image** button. Then, do the following:



Insert Image Button

- a. In the **Image URL** field, paste the full URL to the image on the other server.
 - b. In the **Image Description** field, enter a brief description of the image.
 - c. In the **Title** field, enter a relevant title for the image.
4. Tap **Insert** to complete the process.

Inserting a Widget

The **Widget** tool can be used to add a variety of content elements to the page, including links to any content page or node, product, or category. Links can be positioned on the page in a block format, or incorporated directly into the content. You can use the Widget tool to create links to the following types of content:

- **Content Pages**
- **Catalog Categories**
- **Catalog Products**

By default, links inherit their style from the style sheet of the theme.

To insert a widget:

1. Open the content page to be edited.
2. In the panel on the left, choose **Content**. Then, use either of the following methods:

Method 1: WYSIWYG Mode

1. Tap **Show / Hide Editor** to work in WYSIWYG mode.
2. Position the cursor in the text where you want the widget to appear.
3. On the editor toolbar, tap **Insert Widget**.

Method 2: HTML Mode

From the HTML editor, tap **Insert Widget**.

3. When prompted, choose the **Widget Type**. This example shows how to insert a link to a product.

4. To use the product name, leave the **Anchor Custom Text** field empty.
5. Enter a **Anchor Custom Title** for best SEO practice. (The title isn't visible on the page.)
6. Set **Template** to one of the following:
 - To incorporate the link into text, select “Product Link Inline Template.”
 - To place the link on a separate line, select “Product Link Block Template.”
7. Tap **Select Product**, and do the following:
 - a. In the tree, navigate to the category you want.
 - b. In the list, choose the linked product.
 - c. Click **Insert Widget** to place the link on the page. In the HTML, a **markup tag** for the link appears at the top of the page, enclosed in double curly braces.
 - d. If needed, use Cut (Ctrl + x) and Paste (Ctrl + v) to position the markup tag in the code where you want the link to appear.
8. Tap **Show / Hide Editor** to see the link in WYSIWYG mode.

You can continue editing the page, and incorporate other links into the content.

Inserting a Variable

Your store includes many predefined variables that can be incorporated into content pages and other communications.

To insert a variable on a page:

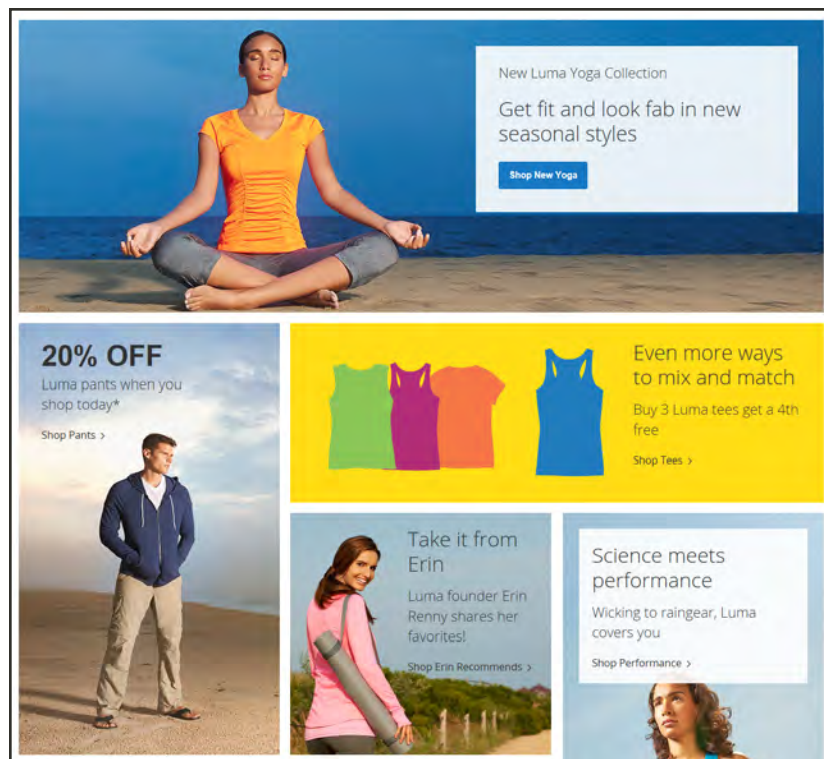
1. Do one of the following:
 - Open an existing page.
 - Create a new page.
2. In the panel on the left, choose **Content**. Then from the editor, do one of the following:
 - Position the cursor where you want the variable to appear, and tap **Insert Variable**.
 - If you prefer to work with the code, 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**.

CHAPTER 33:

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.

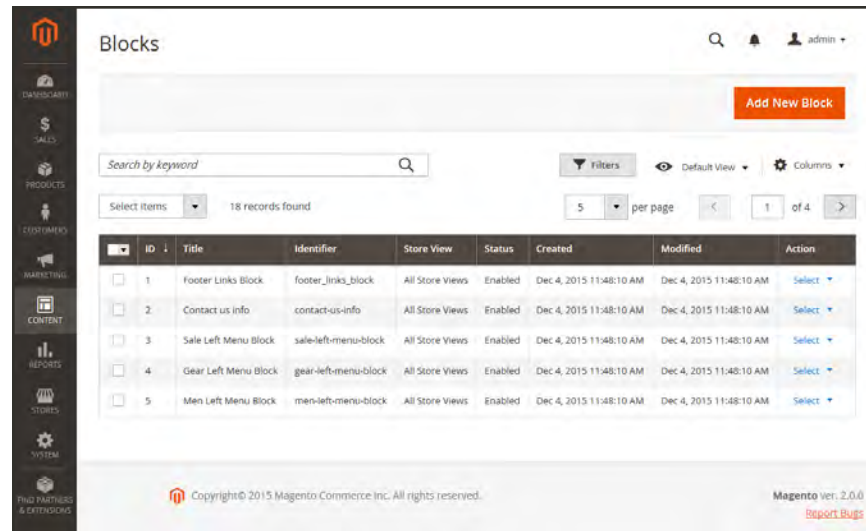


Blocks on Home Page

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.

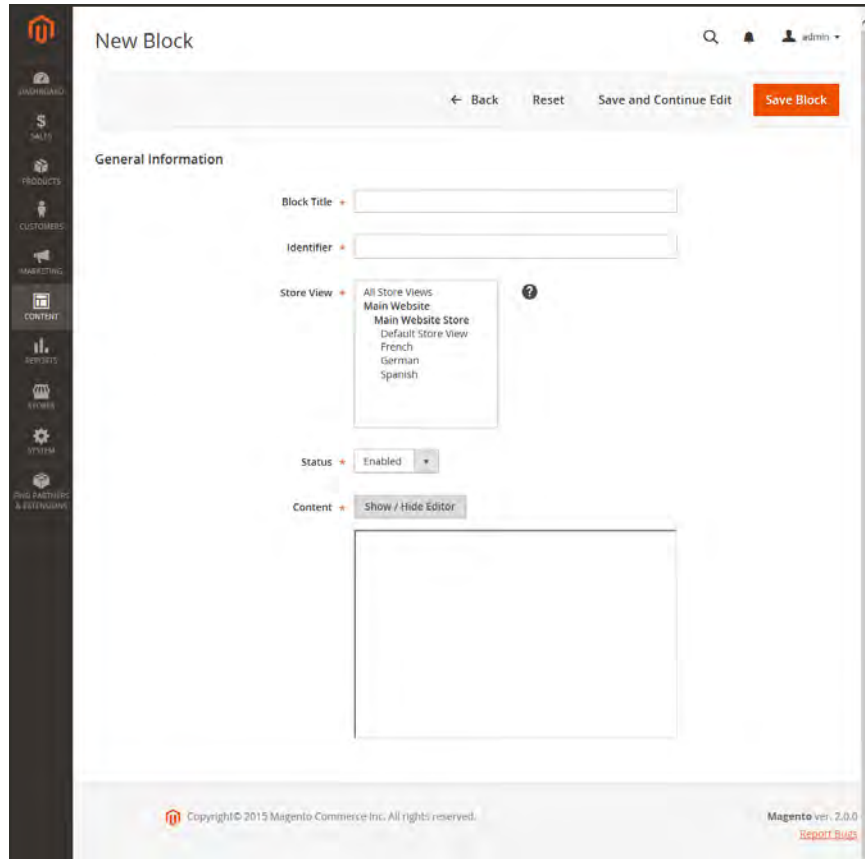


Blocks Workspace

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:
 - a. Assign a **Block Title** for internal reference.
 - b. Assign a unique **Identifier** to the block. Use all lowercase characters, with underscores instead of spaces.
 - c. Choose the **Store View(s)** where the block will be available.
 - d. Set **Status** to “Enabled” to make the block visible in the store.

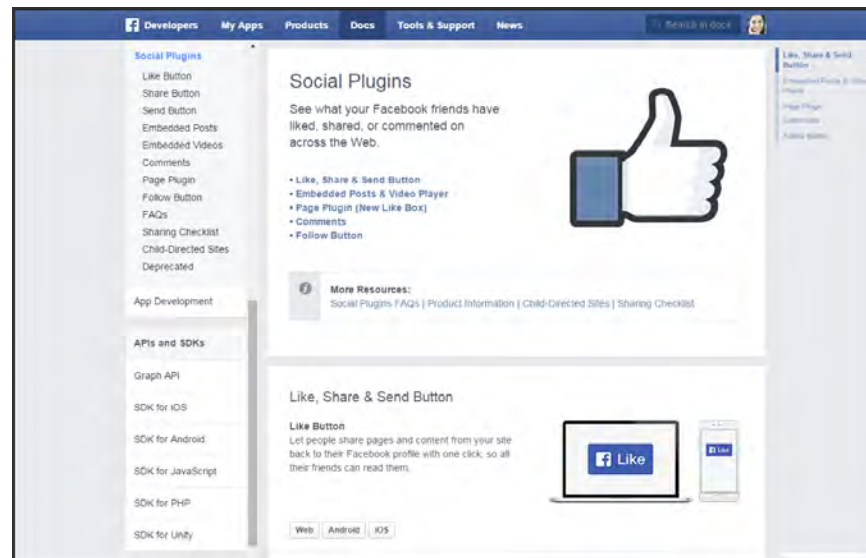
- e. Complete the **Content** of the block
 - You can use the **editor** to format text, create links and tables, images, video, and audio.
 - If you prefer to work with the HTML code, tap **Show / Hide Editor**.
- 3. When complete, tap **Save Block**.



General Information

Adding Social Plugins

Social networking sites have a numerous oplugins that can easily be added to your store. In addition, there are many extensions on Magento Connect that can be used to integrate your store with social media. The following example shows how to add a Facebook “Like” button to your store.



Facebook Plugins

Step 1: Get the Button Code

1. On the Facebook website, go to the [button setup](#) page.
2. In the **URL to Like** field, enter the URL of the page in your store that you want people to Like. For example, you might enter the URL of your store’s home page. Then, do the following:
 - a. Choose the **Layout** for the button.
 - b. Enter the **Width** in pixels that is available on your site for the button and any associated text message.
 - c. Set **Action Type** to one of the following:
 - Like
 - Recommend
3. Tap **Get Code** to copy the generated code to the clipboard.

Like Button Setup

Step 2: Create a Content Block

1. Return to your store. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Blocks**.
2. In the upper-right corner, click tap **Add New Block**. Then, do the following:
 - a. Enter a descriptive **Block Title** for internal reference. For example: Facebook Like Button.
 - b. Assign a unique **Identifier** to the block, using all lowercase characters, and underscores instead of spaces. For example: facebook_like_button.
 - c. If your Magento installation has multiple stores or store views, choose **Store View(s)** where you want the block to appear.
 - d. Set **Status** to “Enabled.”
 - e. Paste the snippet of code that you copied from the Facebook site into the **Content** box.
3. When complete, tap **Save Block**.

Step 3: Place the Block

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Frontend App**.
2. In the upper-right corner, tap **Add New 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, do the following:
5. 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. Set **Page** to where you want the block to appear.

For example, if you choose “All Pages,” and position the block in either the header or footer, the block will appear in the same place on every page of the store.
 - 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**.
6. In the panel on the left, choose **Widget Options**.
7. Tap **Select Block...**. Then in the list, choose the block that you want to place.
8. When complete, tap **Save**.
9. When prompted, follow the instructions at the top of the workspace to update the index and page cache.

The app now appears in the list.

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 and sliders available on [Magento Connect](#), and many are free. To add a lightbox or slider to your store, download the extension from Magento Connect, and follow the instructions from the developer.

Positioning Blocks

The code that controls the page layout and placement of blocks is written in XML [Widgets](#) make it easy to position a block at a specific place on the page, and even for a specific product or category without writing any code. You can select each option from a list, rather than trying to remember all of the possible combinations.

The following list shows the locations by page type where blocks are typically placed. To learn more about how areas on the page are defined, see: [Standard Page Layouts](#).

Category and CMS Pages

BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

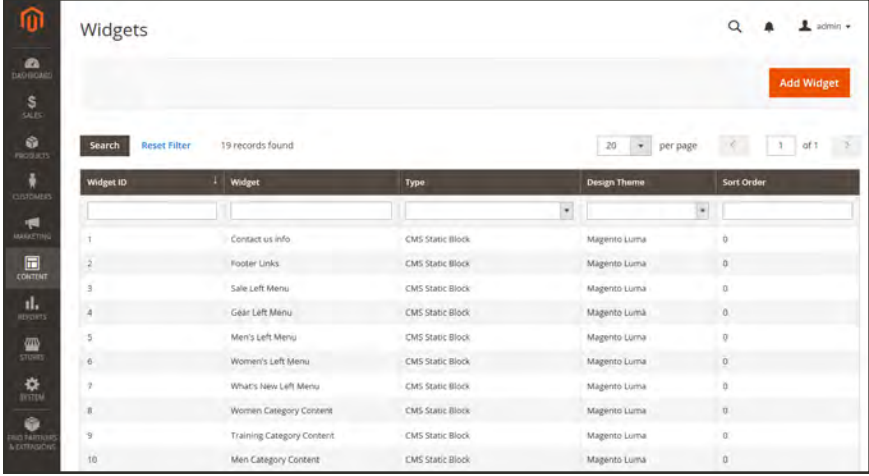
Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition) Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.

BLOCK REFERENCE	POSITION
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.

Using a Widget

The CMS Static Block widget gives you the ability to place an existing **content block** most anywhere in your store.



The screenshot shows the 'Widgets' management page in the Magento Admin interface. It features a sidebar on the left with navigation options like Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, and Settings & Extensions. The main content area displays a table of widgets with columns for Widget ID, Widget, Type, Design Theme, and Sort Order. There are 19 records found, and the table shows the first 10 records, all of which are CMS Static Blocks of various types like 'Contact us info', 'Footer Links', and 'Sale Left Menu'.

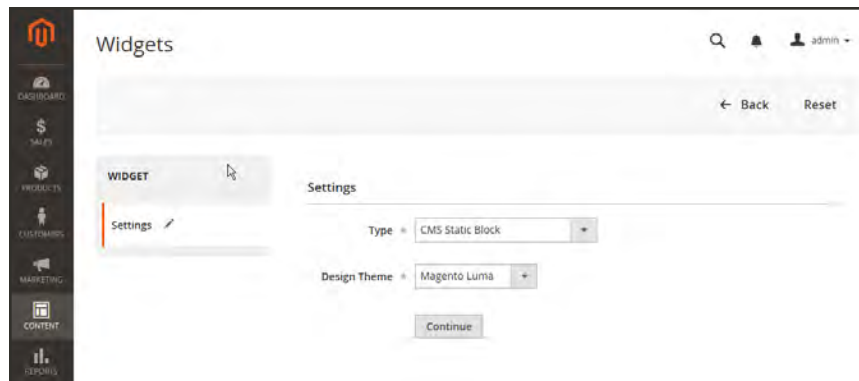
Widget ID	Widget	Type	Design Theme	Sort Order
1	Contact us info	CMS Static Block	Magento Luma	0
2	Footer Links	CMS Static Block	Magento Luma	0
3	Sale Left Menu	CMS Static Block	Magento Luma	0
4	Gear Left Menu	CMS Static Block	Magento Luma	0
5	Men's Left Menu	CMS Static Block	Magento Luma	0
6	Women's Left Menu	CMS Static Block	Magento Luma	0
7	What's New Left Menu	CMS Static Block	Magento Luma	0
8	Women Category Content	CMS Static Block	Magento Luma	0
9	Training Category Content	CMS Static Block	Magento Luma	0
10	Men Category Content	CMS Static Block	Magento Luma	0

Process Overview:

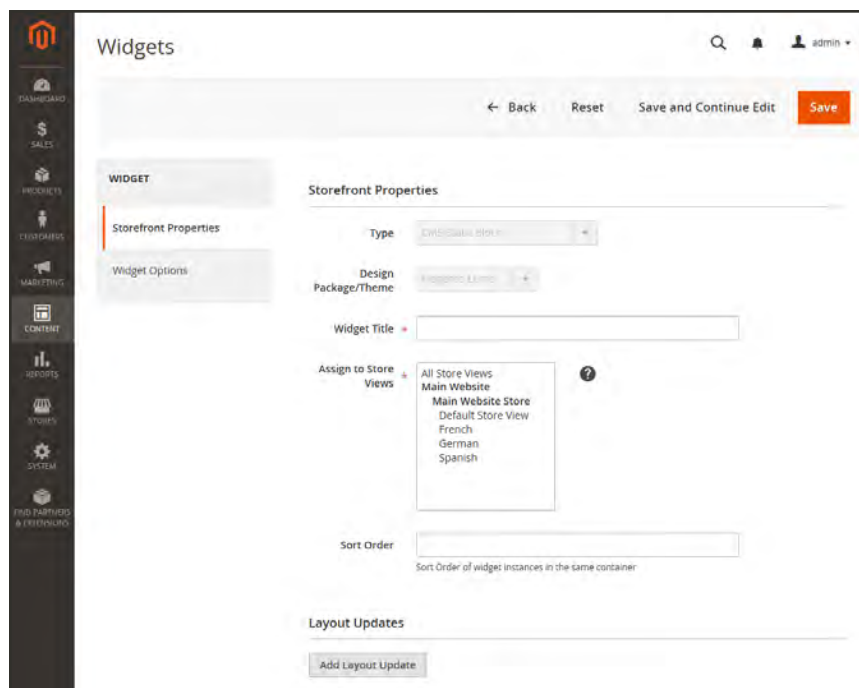
- Step 1: **Choose the Type**
- Step 2: **Complete the Layout Updates**
- Step 3: **Place the Block**

Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. In the upper-right corner, tap **Add Widget**. Then do the following:
 - a. In the Settings section, set **Type** to “CMS Static Block.” Then, tap **Continue**.
 - b. Verify that **Design Theme** is set to the current theme.
 - c. Tap **Continue**.

*Settings*

3. In the Storefront Properties section, do the following:
 - a. In the **Widget Title** field, enter a descriptive title for internal reference.
 - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
 - c. Enter a number in the **Sort Order** field to determine the order of the block if it assigned to appear in the same location on the page as other content elements. The top position is zero.

*Storefront Properties*

Step 2: Complete the Layout Updates

1. In the Layout Updates section, tap **Add Layout Update**. Then, do the following:
2. Set **Display On** to the category, product, or page where you want the block to appear. To place the block on a specific page, do the following:
 - a. Choose the **Page** where you want the block to appear.
 - b. Choose the **Block Reference** that identifies the place on the page where the block is to be placed.
 - c. Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."

The screenshot shows a form titled "Layout Updates". At the top, there is a "Display on" dropdown menu currently set to "Specified Page". Below this, the form is organized into three columns: "Page", "Container", and "Template". The "Page" column has a dropdown menu set to "CMS Home Page". The "Container" column has a dropdown menu set to "Main Content Area". The "Template" column contains the text "CMS Static Block Default Template". At the bottom left of the form is a button labeled "Add Layout Update".

Layout Updates

Step 3: Place the Block

1. In the panel on the left, select **Widget Options**.
2. Tap **Select Block...**. Then in the list, choose the block that you want to place.
3. When complete, tap **Save**.
The app now appears in the list.
4. When prompted, follow the instructions at the top of the workspace to update the index and page cache.
5. Return to your storefront to verify that the block appears in the correct location. To move the block, you can reopen the frontend app try a different page or block reference.

Using a Layout Update

Blocks can be placed in the left or right sidebar of a specific page by making a **layout update** to the XML code. With a few simple changes to the code, you can position the block in either sidebar, and control its position in relation to other blocks.

The term **callout**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**.

¹A term that is sometimes used to describe a block that is defined as a layout update using XML code.

²The right or left column of a two-column page layout.



CHAPTER 34:

Widgets

A widget is a snippet of code that makes it possible to display a wide range of content and place it at specific block references in your store. Many display real-time, dynamic data and create opportunities for your customers to interact with your store. The Widget tool makes it easy to place existing content such as blocks with images and text, and interactive elements most anywhere in your store.

You can use widgets to create landing pages for marketing campaigns, display promotional content at specific locations throughout the store. Widgets can also be used to add interactive elements and action blocks for external review systems, video chats, voting, and subscription forms, or to provide navigation elements for tag clouds and image sliders.

Widget Types

Widgets

TYPE	DESCRIPTION
CMS Page Link	Displays a link to a selected page. Allows you to specify custom text and title. When the link is complete, it can be used in content pages and blocks.
CMS Static Block	Displays a block of content at a specific location on a page.
Catalog Category Link	Displays either an inline or block-style link to a selected catalog category. When the link is complete, it can be used in content pages and blocks.
Catalog 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.
Orders and Returns	Gives customers the ability to submit their own requests for returned merchandise authorization.
Recently Compared Products	Displays the block of recently compared products. You can specify the number of products included, and format them as a list or product grid.
Recently Viewed Products	Displays the block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.

Creating a Widget

The process of creating a widget is nearly the same for each type. You can follow the first part of the instructions, and then complete the last part for the specific type of widget.

Widget ID	Widget	Type	Design Theme	Sort Order
1	Contact us info	CMS Static Block	Magento Luma	0
2	Footer Links	CMS Static Block	Magento Luma	0
3	Sale Left Menu	CMS Static Block	Magento Luma	0
4	Gear Left Menu	CMS Static Block	Magento Luma	0
5	Men's Left Menu	CMS Static Block	Magento Luma	0
6	Women's Left Menu	CMS Static Block	Magento Luma	0
7	What's New Left Menu	CMS Static Block	Magento Luma	0
8	Women Category Content	CMS Static Block	Magento Luma	0
9	Training Category Content	CMS Static Block	Magento Luma	0
10	Men Category Content	CMS Static Block	Magento Luma	0

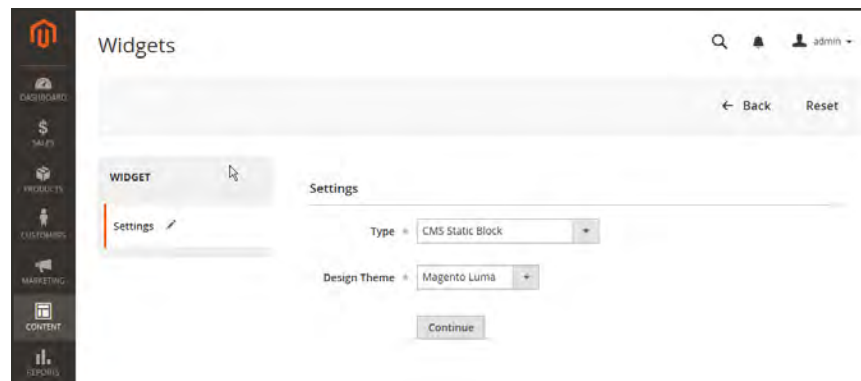
Widgets

Process Overview:

- Step 1: **Choose the Type**
- Step 2: **Specify Where It Goes**
- Step 3: **Complete the Options**
- Step 4: **Check It Out!**

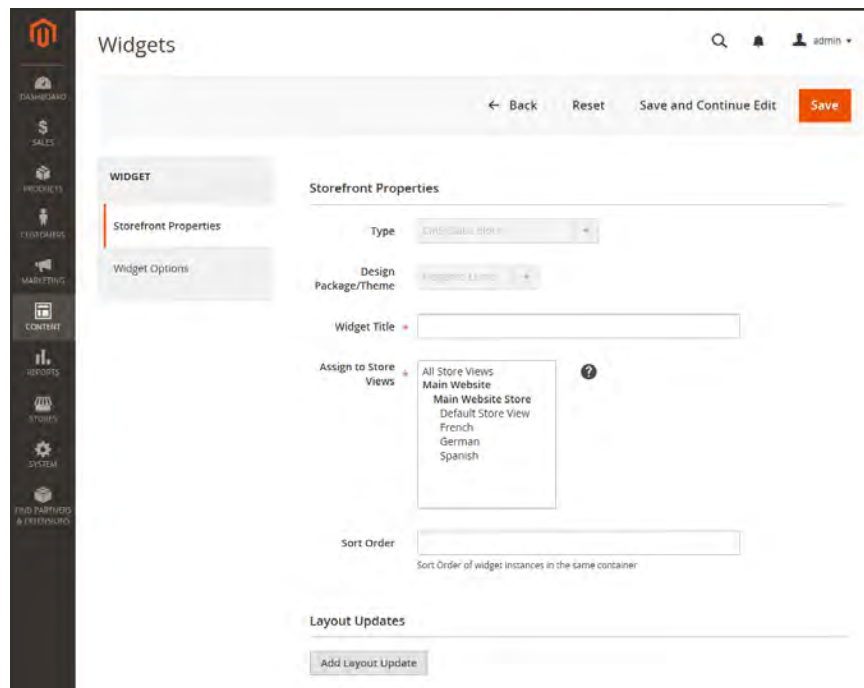
Step 1: Choose the Type

1. On the Admin sidebar, tap **Content**. Then under **Elements**, choose **Widgets**.
2. Tap **Add Widget**. Then, do the following;
 - a. In the Settings section, set **Type** to the type of widget that you want to create. Then, tap **Continue**.
 - b. Verify that **Design Theme** is set to the current theme.
3. Tap **Continue**.



Widget Settings

4. Under **Storefront Properties**, do the following:
 - a. In the **Widget Title** field, enter a descriptive title for internal reference only.
 - b. Set **Assign to Store Views** to “All Store Views,” or to the view where the app will be available. To select more than one, hold the Ctrl key down and select each option.
 - c. Enter a number in the **Sort Order** field to determine the order of the block if it appears in the same location as other content elements. The top position is zero.



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.

The screenshot shows a 'Layout Updates' configuration window. At the top, there's a 'Display on' dropdown menu with 'Specified Page' selected. Below this, there are three columns of dropdown menus: 'Page' (set to 'CMS Home Page'), 'Container' (set to 'Main Content Area'), and 'Template' (set to 'CMS Static Block Default Template'). At the bottom of the panel is a button labeled 'Add Layout Update'.

Layout Updates

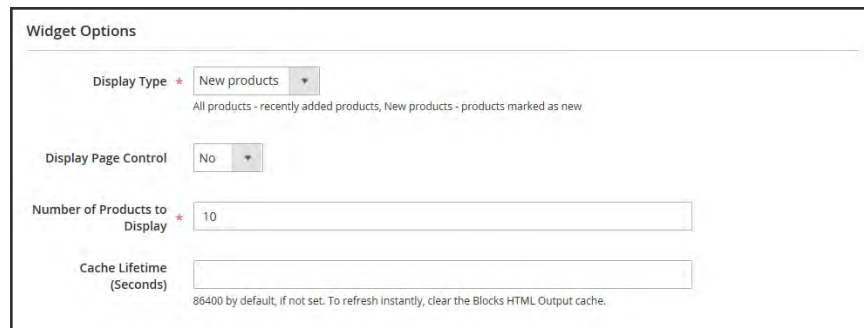
4. If the widget is a link, set **Template** to one of the following:

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

Display Type *
All products - recently added products, New products - products marked as new

Display Page Control

Number of Products to Display *

Cache Lifetime (Seconds)

86400 by default, if not set. To refresh instantly, clear the Blocks HTML Output cache.

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.

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.

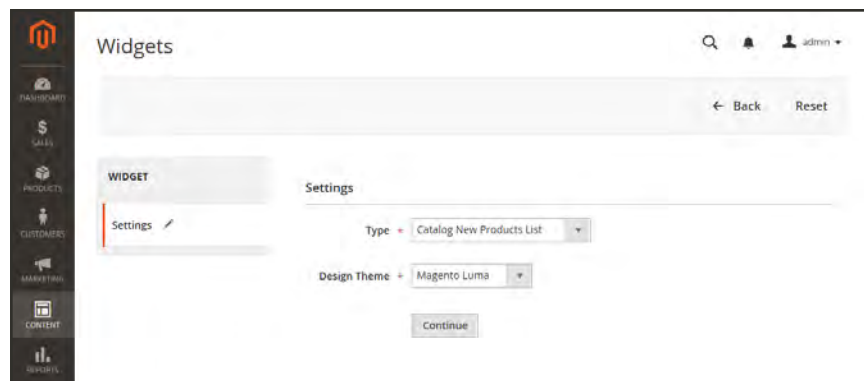
1. On the Admin sidebar, tap **Products**. Then under **Inventory**, choose **Catalog**.
2. Find each product that you want to feature, and open in edit mode. Then, do the following:
 - a. In the **Set Product as New From Date** field, tap the calendar . Then, choose the first date that you want the product to be featured.
 - b. In the **Set Product as New To Date** field, tap the calendar . Then, choose the last date that you want the product to be featured.
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 products now appear in the New Products list during 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 New 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 Templates
 - New Products Grid Template

Layout Updates

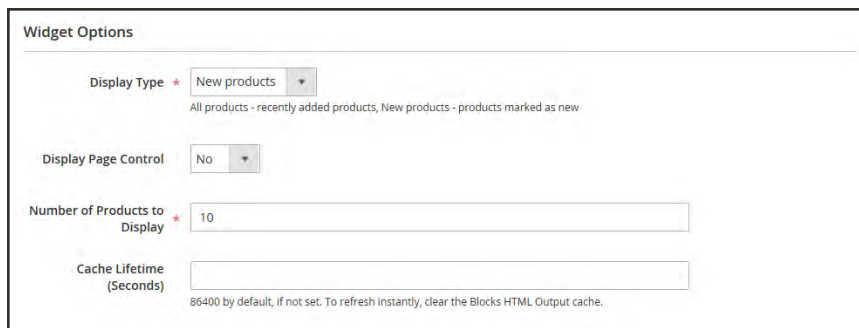
- 2. Tap **Save and Continue Edit**.

Step 4: Configure the List

- 1. In the panel on the left, choose **Widget Options**. Then, do the following:
- 2. Set **Display Products** to one of the following:

All Products	Lists products in sequence, starting with those most recently added.
New Products	Lists only the products which are identified as "New." A product is considered to be new during the date range specified in the "Set Product As New From" date and "Set Product As New To" date. fields of the product. The list will be blank if the date range expires and no additional products have been set as "New."

- 3. Complete the remaining information as follows:
 - a. To provide navigation control for lists with multiple pages, set **Display Page Control** to "Yes." Then, in the **Number of Products per Page** field, enter the number of products you want to appear on each page.
 - b. Set **Number of Products to Display** to the number of new products you want to include in the list. The default setting is 10.
 - c. In the **Cache Lifetime (Seconds)** field, select how often you want to refresh the list of new products. By default, the cache is set to 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.

Design & Theme

Your store's theme is like a window dressing that can be changed for a season or promotion. In this section, you will learn about page layouts, how to make simple HTML changes, and apply a new theme to your store.

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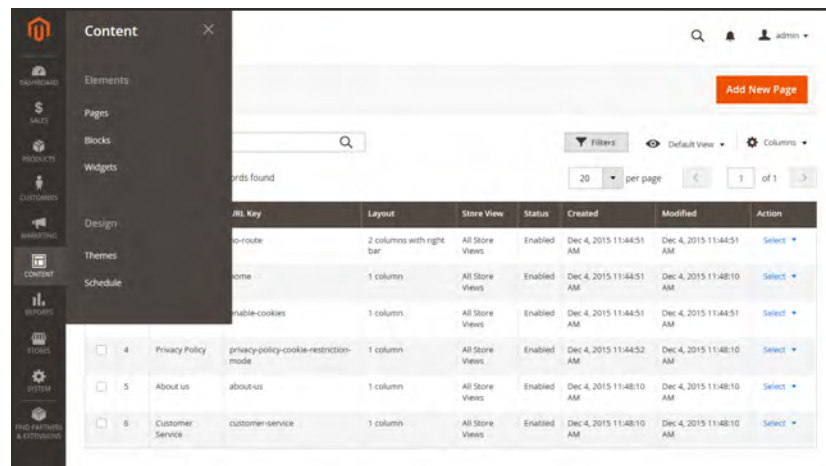
Scheduling Design Changes

CHAPTER 35:

Design Menu

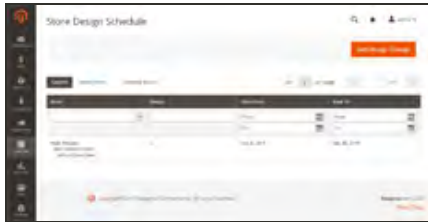
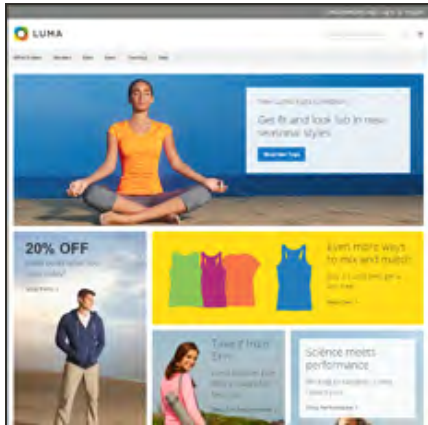
Magento provides a variety of easy-to-use design options that you can use to make simple changes to your store. In addition, you will find many professionally designed themes available on Magento Connect. Like the window dressing of your store, you can change the theme for the season or for a promotion.

More advanced users will appreciate the flexibility of working with Magento's object-oriented environment that assembles pages from separate components. After you understand the basics, you'll appreciate working in such a flexible and fluid environment. To learn more, see the [Magento Design's Guide](#).



Design Menu

Menu Options



Themes

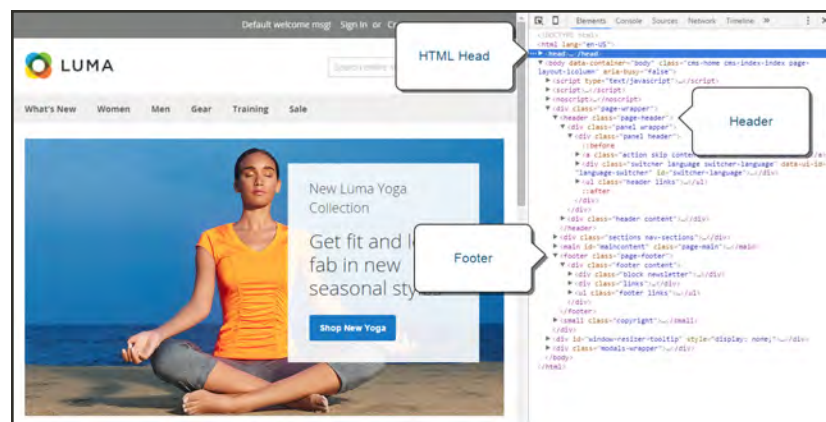
The theme determines the visual presentation of your store, and consists of a collection of layout files, template files, translation files, and skins.

Schedule

Themes can be activated for a period of time, according to a schedule. Use the schedule to plan theme changes in advance for a season or promotion.

CHAPTER 36:**Page Setup**

The main sections of the page are controlled, in part, by a set of standard HTML tags. Some of these tags can be used to determine the selection of fonts, color, size, background colors, and images that are used in each section of the page. Other settings control page elements such as the logo in the header, and the copyright notice in the footer. The Page Setup sections correspond to the underlying structure of the HTML page, and many of the basic properties can be set from the Admin.



HTML Page Sections

HTML Head

The settings in the HTML Head section correspond to the `<head>` tag of an HTML page, and can be configured for each store view. In addition to meta data for the page title, description, and keywords, the section includes a link to the favicon, and miscellaneous scripts.

Instructions for search engine robots and the display of the store demo notice are also configured in this section.

To configure the HTML Head:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. If you have multiple stores or views, set the **Store View** in the upper-left corner to the store view where the configuration applies. (When configuring a specific store view, you must clear the Use Default checkbox after each field so new values can be entered.)
4. Expand ☺ the **HTML Head** section.
5. Update the fields as needed. (See the [Configuration Reference](#) for a description of each field,)
6. When complete, tap **Save Config**.

HTML Head

Favicon Icon No file chosen [STORE VIEW]
Allowed file types: ICO, PNG, GIF, JPG, JPEG, APNG, SVG. Not all browsers support all these formats!

Default Title [STORE VIEW]

Title Prefix [STORE VIEW]

Title Suffix [STORE VIEW]

Default Description [STORE VIEW]

Default Keywords [STORE VIEW]

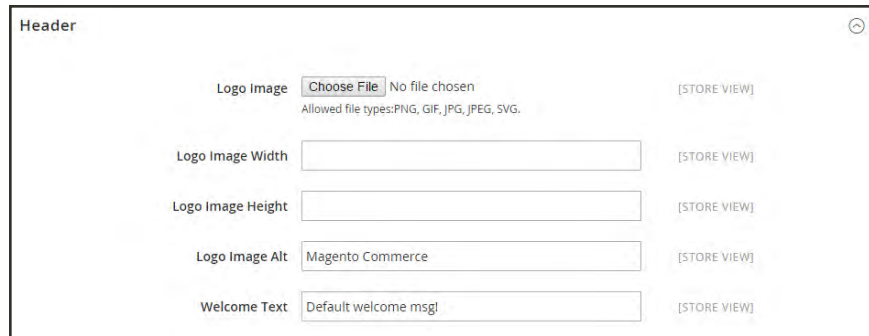
Miscellaneous Scripts [STORE VIEW]
This will be included before head closing tag in page HTML.

Display Demo Store Notice [STORE VIEW]

HTML Head

Header

The Header section identifies the path to your store logo, and specifies the logo alt text and welcome message.




The screenshot shows the 'Header' configuration panel in the Magento Admin interface. It contains the following fields and options:

- Logo Image:** A file selection field with a 'Choose File' button, 'No file chosen' text, and a list of allowed file types: PNG, GIF, JPG, JPEG, SVG. A '[STORE VIEW]' link is to the right.
- Logo Image Width:** A text input field with a '[STORE VIEW]' link to the right.
- Logo Image Height:** A text input field with a '[STORE VIEW]' link to the right.
- Logo Image Alt:** A text input field containing 'Magento Commerce' with a '[STORE VIEW]' link to the right.
- Welcome Text:** A text input field containing 'Default welcome msg!' with a '[STORE VIEW]' link to the right.

Header

To configure the header:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand  the **Header** section. Then, make any changes necessary.
4. When complete, tap **Save Config**.

Footer

The Footer configuration section is where you can update the **copyright notice** that appears at the bottom of the page, and enter miscellaneous scripts that must be positioned before the closing `<body>` tag..



The screenshot shows the 'Footer' configuration section in the Magento Admin interface. It features two text input fields. The first field is labeled 'Copyright' and contains the text 'Copyright © 2015 Magento. All rights reserved.' with a '[STORE VIEW]' dropdown menu to its right. The second field is labeled 'Miscellaneous HTML' and is currently empty, also with a '[STORE VIEW]' dropdown menu to its right. Below the second field, a small note states: 'This will be displayed just before body closing tag.'

Footer

To configure the footer:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Design**.
3. Expand ☺ the **Footer** section. Then, make any changes necessary.
4. When complete, tap **Save Config**.



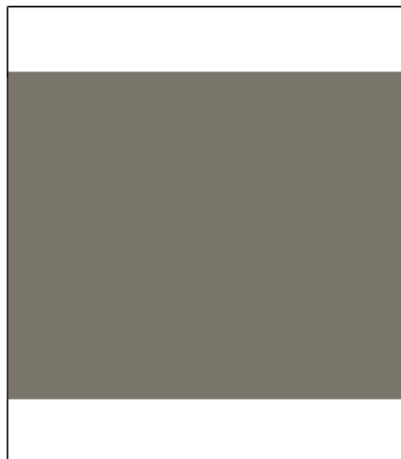
CHAPTER 37:

Page Layout

The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the “floor plan” of the page.

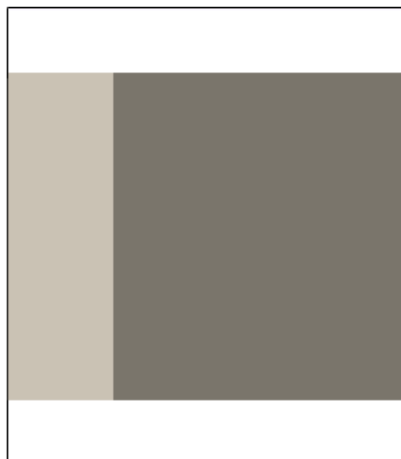
Content blocks float to fill the available space, according to the section of the [page layout](#) where they are assigned to appear. You will discover that if you change the layout from a three-column to a two-column layout, the content of the main area expands to fill the available space, and any blocks that are associated with the unused side bar seem to disappear. However, if you restore the three-column layout, the blocks reappear. This fluid approach, or liquid layout, makes it possible to change the page layout without having to rework the content. If you are used to working with individual HTML pages, you will discover that this modular, “building block” approach requires a different way of thinking.

Standard Page Layouts



1 Column

The “1 Column” layout can be used to create a dramatic home page with a large image or focal point. It’s also a good choice for a landing page, or any other page that has a combination of text, images, and video.



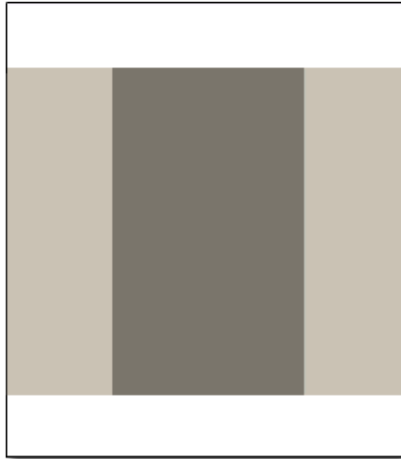
2 Columns with Left Bar

The “2 Columns with Left Bar” layout is often used for pages with navigation on the left, such as a catalog or search results pages with layered navigation. It is also an excellent choice for home pages that need additional navigation or blocks of supporting content on the left.



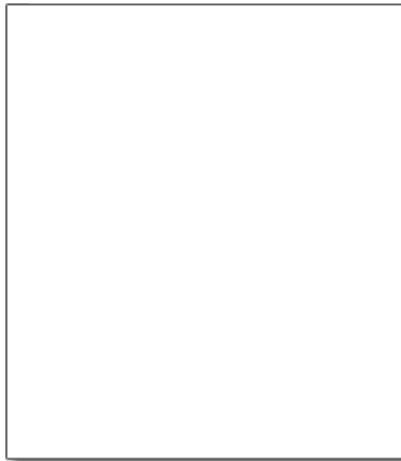
2 Columns with Right Bar

With a “2 Columns with Right Bar” layout, the main content area is large enough for an eye-catching image or banner. This layout is also often used for Product pages with blocks of supporting content on the right.



3 Columns

The “3 Column” layout has a center column that is wide enough for the main text of the page, with room on each side for additional navigation and blocks of supporting content.



Empty

The “Empty” layout can be used to define custom page layouts. To learn more, see the [Magento Designer’s Guide](#).

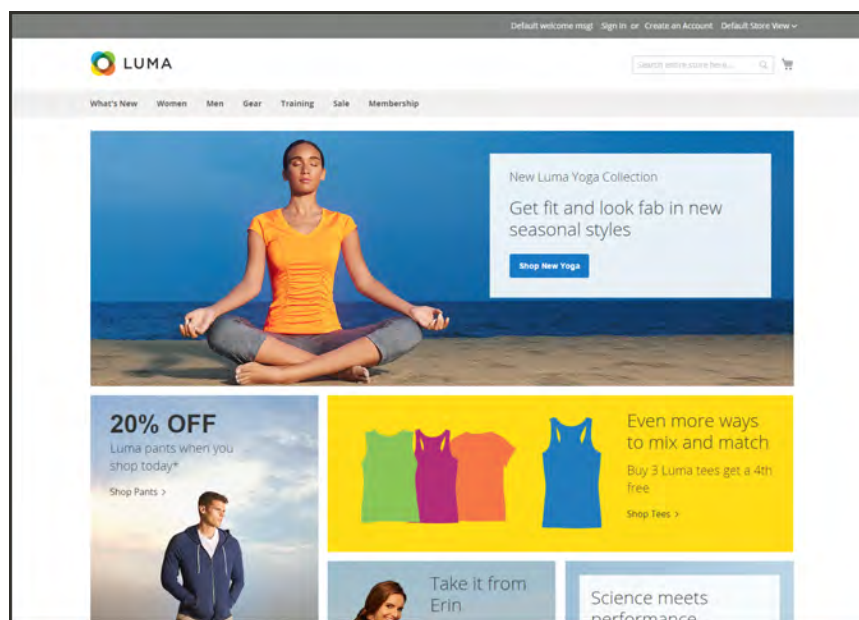
Storefront Examples

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

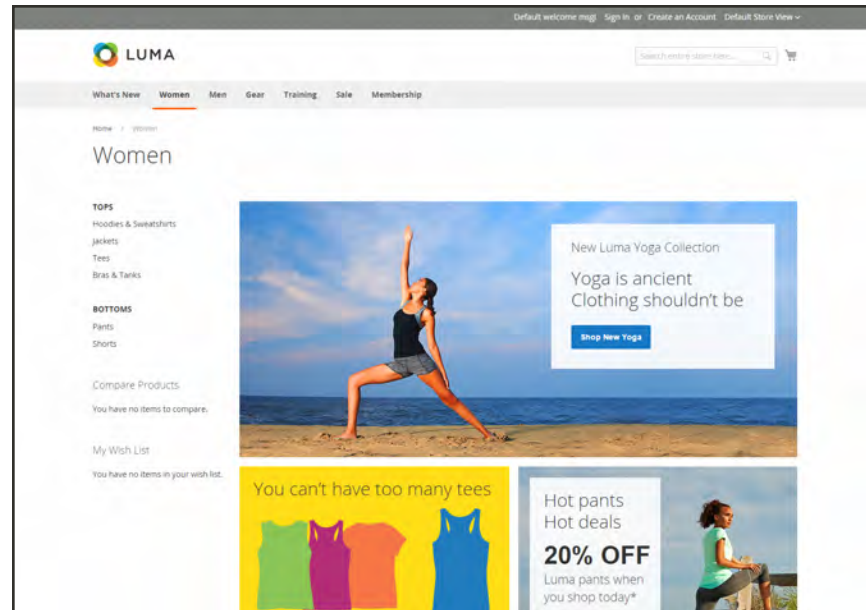
The content area of a “1 Column” layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.



1 Column Layout

2 Columns with Left Bar

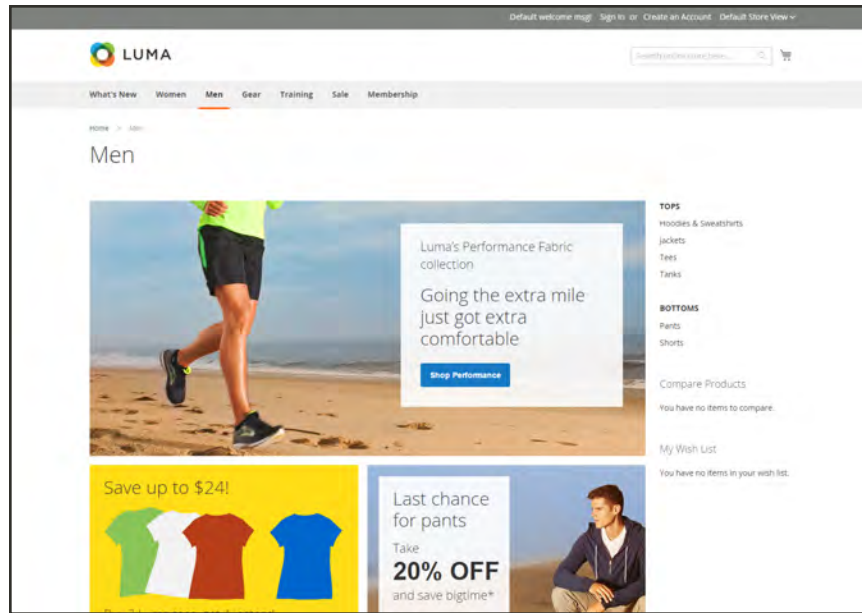
The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.



2 Columns Left Bar

2 Columns with Right Bar

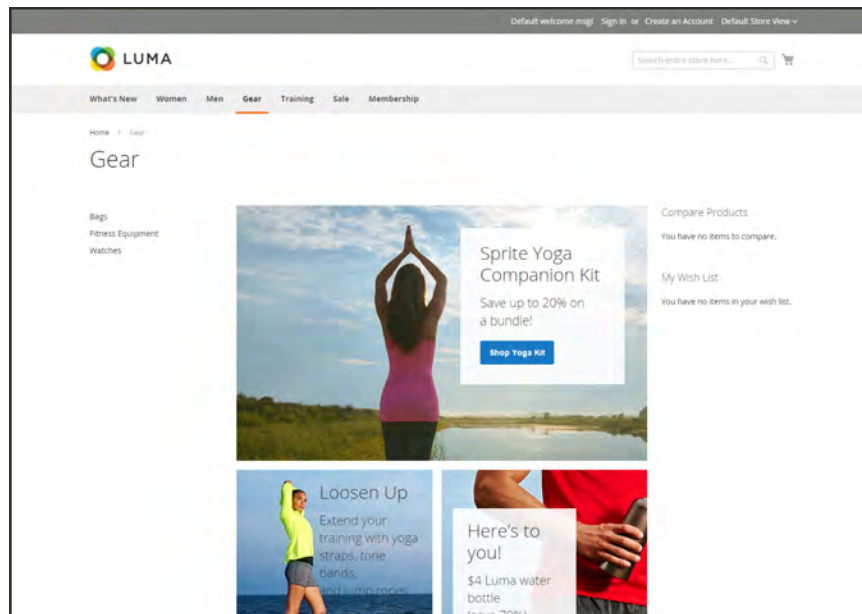
This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.



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 Community Edition 2.0 store is a hierarchical structure of blocks. Some elements appear on every page, and others appear only on specific pages. You can see how these structural blocks are referenced by examining the layout update code for your home page. To do so, simply open your home page in edit mode, and choose the Design tab to view the Page Layout section. Depending on the theme, it might contain instructions to remove blocks, unset blocks, and add blocks by referencing specific areas of the page layout.

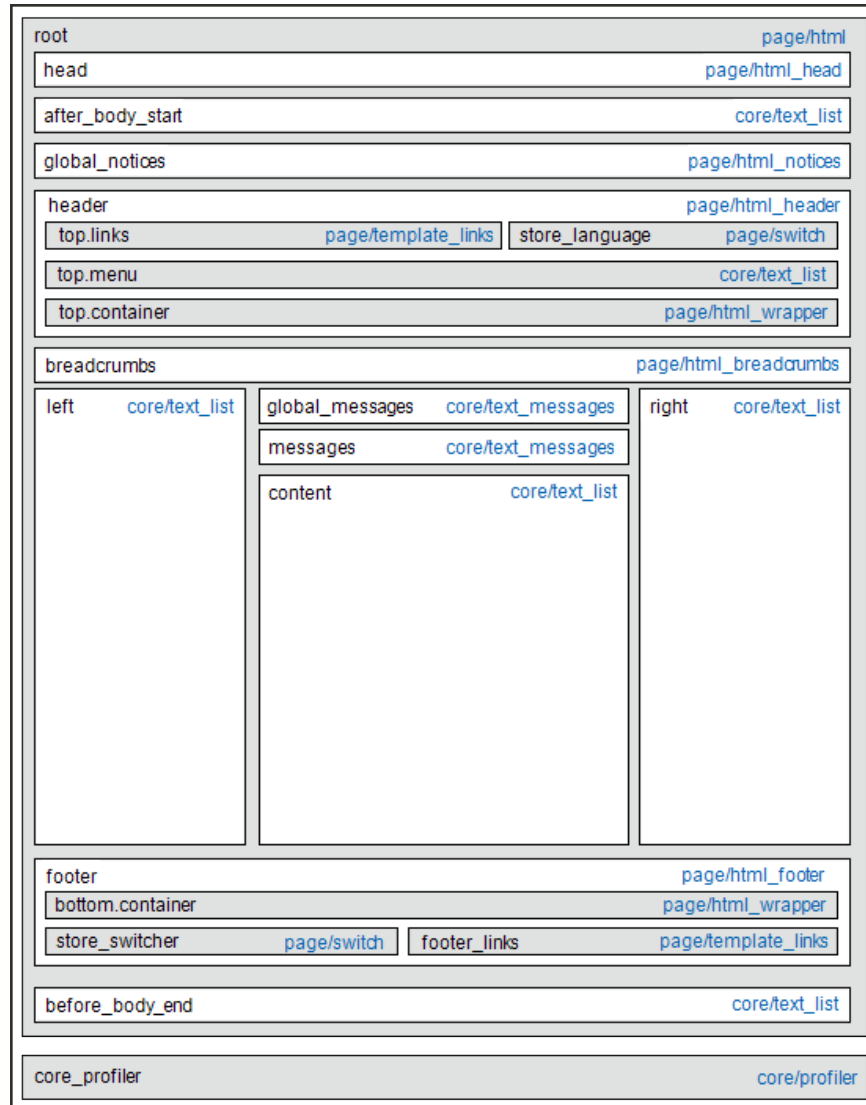
In many cases, the same result can be achieved with the Frontend App tool. To place a block of content as a frontend app, you must identify the page, and the location on the page where you want the block to appear. You can use the Frontend App tool to place a block on most any page in your store, including the home page and all content pages. However, to place a block in the sidebar of a specific page, you must make the change by entering code as a layout update.

¹The visual and structural composition of a page.

²A specific set of XML instructions that determines how the page is constructed.

Standard Block Layout

In the following diagram, the block names that can be used to refer to a block in the layout are black, and the block types, or block class paths, are blue.



Standard Block Layout

Block Descriptions

BLOCK TYPE	DESCRIPTION
<code>page/html</code>	There can be only one block of this type per page. The block name is "root," and, it is one of the few root blocks in the layout. You can also create your own block and name it "root," which is the standard name for blocks of this type.
<code>page/html_head</code>	There can be only one block of this type per page. The block name is "head," and it is a child of the root block. This block must not be removed from layout.
<code>page/html_notices</code>	There can be only one block of this type per page. The block name is "global_notices," and it is a child of the root block. If this block is removed from the layout, the global notices will not appear on the page.
<code>page/html_header</code>	There can be only one block of that type per page. The block name is "header," and it is a child of the root block. This block corresponds to the visual header at the top of the page, and contains several standard blocks. This block must not be removed.
<code>page/html_wrapper</code>	Although included in the default layout, this block is deprecated, and only is included to ensure backward compatibility. Do not use blocks of this type.
<code>page/html_breadcrumbs</code>	There can be only one block of this type per page. The name of this block is "breadcrumbs," and it is a child of the header block. This block displays breadcrumbs for the current page.
<code>page/html_footer</code>	There can be only one block of this type per page. The block name is "footer," and it is a child of the root block. The footer block corresponds to the visual footer at the bottom of the page, and contains several standard blocks. This block must not be removed.
<code>page/template_links</code>	There are two blocks of this type in the standard layout. The "top.links" block is a child of the header block, and corresponds to the top navigation menu. The "footer_links" block is a child of the footer block, and corresponds to the bottom navigation menu. It is possible to manipulate the template links, as shown in the examples.

Block Descriptions (cont.)

BLOCK TYPE	DESCRIPTION
<code>page/switch</code>	There are two blocks of this type in a standard layout. The "store_language" block is a child of the header block, and corresponds to the top language switcher. The "store_switcher" block is a child of the footer block, and corresponds to the bottom store switcher.
<code>core/messages</code>	There are two blocks of this type in a standard layout. The "global_messages" block displays global messages. The "messages" block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.
<code>core/text_list</code>	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
<code>core/profiler</code>	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
<pre>addLink(\$label, \$url, \$title, \$prepare</pre>	<p>Adds another link to the end of the list of existing links. Just specify the <code>\$label</code> (link caption), <code>\$url</code> (link URL) and <code>\$title</code> (link tooltip), and you'll see a new link in the corresponding place. The <code>\$prepare</code> parameter must be "true" if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the new page becomes <code>BASE_URL/newpage</code> if prepared.</p>
<pre>removeLinkByUrl(\$url)</pre>	<p>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.</p>

cms/block

Syntax

ACTION	DESCRIPTION
<pre>setBlockId(\$blockId)</pre>	<p>Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.</p>

```
?
<!--...-->

<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)	<p>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:</p> <pre data-bbox="760 615 997 636"><![CDATA[...]]></pre>

```

?
<!--...-->

<reference name="content">
  <block type="core/text" name="test.block">
    <action method="addText">
      <txt><![CDATA[<h2>ATTENTION!</h2><p>Check your options
carefully before you submit.</p>]]></txt>
    </action>
  </block>
</reference>
<!-- -->

```

page/html_welcome

This block can be used to duplicate the “Welcome, <USERNAME>!” message that appears in the header block. When the user is not logged in, the welcome message specified in the configuration appears.

Layout Update Syntax

Custom layout updates can be applied to product category pages, product pages, and content page to achieve a variety of results, such as:

<code><block></code>	Create new block.
<code><reference></code>	Update existing content.
<code><action></code>	Assign actions to blocks.
<code><remove></code>	Remove blocks.

Any change made to the layout is applied when the associated entity—which can be either a product, category, or CMS page—becomes active in the frontend of the store.

Custom layout update instructions consist of well-formed XML tags, without the `<?xml ...>` declaration and root tag. As with normal XML, every tag must either be empty or properly closed, as shown in the following examples:

```
<tag attribute="value" />
<tag attribute="value"> ... </tag>
```

<block>

Creates a new block within the current context. Layout block nesting defines the ordering of block initialization location of the blocks on the page.

Syntax

NAME	VALUE
type	<p>* block class path</p> <p>An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.</p>
name	<p>* block name identifier</p> <p>A name that can be used to address the block in which this attribute is assigned. If you create a new block with the name that is the same as one of the existing blocks, your newly created block substitutes the previously existing block. See the list of names of existing blocks below.</p>
before	<p>block name '-'</p> <p>Is used to position the block before a block with the name specified in the value. If "-" value used the block is positioned before all other sibling blocks.</p>
after	<p>block name '-'</p> <p>Is used to position the block after a block with the name specified in the value. If "-" value used the block is positioned after all other sibling blocks.</p>
template	<p>template filename</p> <p>A template filename used for the specific block type. As you have no way to see the list of template files, use whatever template value is demanded for every block type listed below.</p>
as	<p>block alias</p> <p>An alias name by which a template calls the block in which this attribute is assigned. Sometimes it's necessary to specify the alias for a specific block type.</p>

<reference>

Changes the context for all included instructions to a previously defined block. An empty `<reference>` tag if of no use, because it affects only the instructions which are children.

Syntax

NAME	VALUE
name	* block name A name of a block to reference.

<action>

Used to access block API, in other words, call block's public methods. It is used to set up the execution of a certain method of the block during the block generation. Action child tags are translated into block method arguments. The list of all available methods depends on the block implementation (e.g. public method of the block class).

Syntax

NAME	VALUE
method	* block method name A name of the public method of the block class this instruction is located in that is called during the block generation.

<remove>

Removes an existing block from the layout.

Syntax

NAME	VALUE
name	* block name The name of the block to be removed.

<extend>

This instruction performs final modifications to blocks which are already part of the layout. Every attribute in the `<block>` instruction—except for the block name—is subject for change. In addition, the special attribute `parent` can be used to change the parent of the block. Simply put the name of the new parent block into the `<extend>` instruction, and the parent of the block that is referenced will be changed in the layout.

Syntax

NAME	VALUE
name	* block name The name of any block to be extended.
*	any other Any other attribute specific for the <block> instruction.
parent	block name The name of the block that should become a new parent for the referenced block.
	* Indicates a required value

Controlling Block Order

Sometimes more than one content element is assigned to the same structural block. For example, there might be several blocks 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.

¹The order in which scripts are loaded into memory. To work correctly, some scripts must be loaded before others.

²In programming, a name used to reference an object.

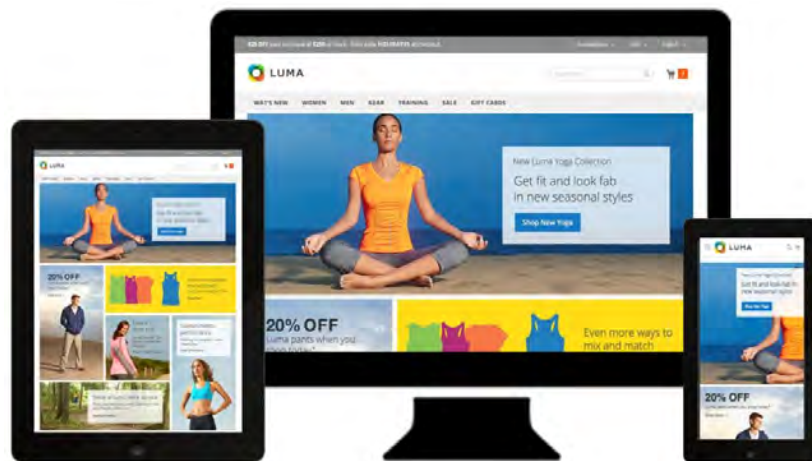


CHAPTER 38:

Themes

A theme is a collection of files that determines the visual presentation of your store. When you first install Magento Community Edition 2.0, the design elements of the store are based on the “Default” Theme. In addition to the initial default theme that comes with your Magento installation, there is a wide variety of themes that are available “off the shelf” on Magento Connect.

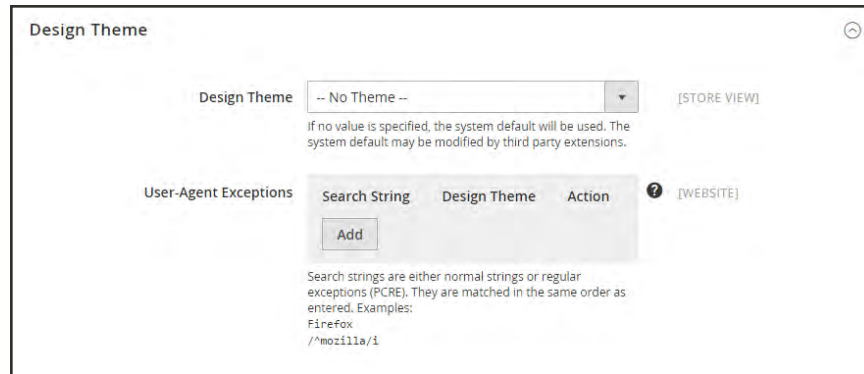
Magento themes include layout files, template files, translation files, and skins. A skin is a collection of supporting CSS, images, and JavaScript files that together, create the visual presentation and interactions that your customers experience when they visit your store. Themes and skins can be modified and customized by a developer or designer who has knowledge of Magento theme design and access to your server. To learn more, see the [Frontend Developer Guide](#).



Luma Theme

Using the Default Theme

Magento's default responsive theme renders the display of your storefront for different devices, and incorporates best practices for desktop, table, and mobile devices. To learn more, see the [Responsive Theme Developer's Guide](#).



Design Theme

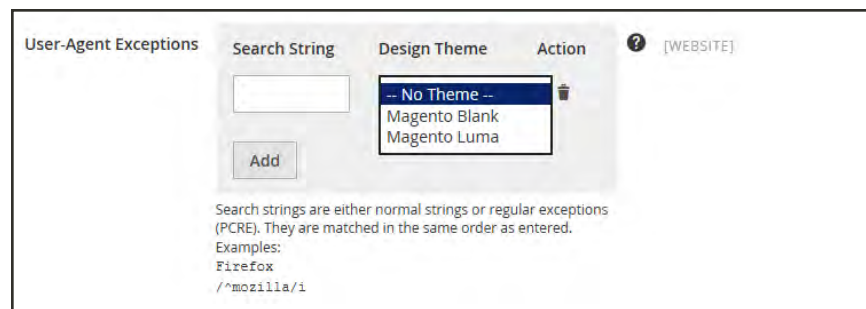
Some themes are designed to be used only with specific devices. When Magento detects a specific browser ID, or user agent, it uses the theme that is configured to be used for the specific browser. The search string can also include Perl-Compatible Regular Expressions (PCRE). To learn more, see: [User Agent](#).

```
Firefox  
/^mozilla/i
```

To view the default theme:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand ☑ the **Design Theme** section.
4. Set **Design Theme** to the theme that you want to apply to the store.
5. If the theme is to be used for only a specific device, do the following:
 - a. Under **User-Agent Exceptions**, tap **Add**.
 - b. In the **Search String** field, enter the browser ID for the specific device.

Search strings are matched in the order they are entered.



User-Agent Exceptions

- c. Repeat the process to enter additional devices.
6. When complete, tap **Save Config**.

Installing a New Theme


When you first install Magento, the design elements of the store are based on the “Default” theme. You can modify the theme, add themes created by others, or create new ones. To learn more, see the [Designer’s Guide](#).

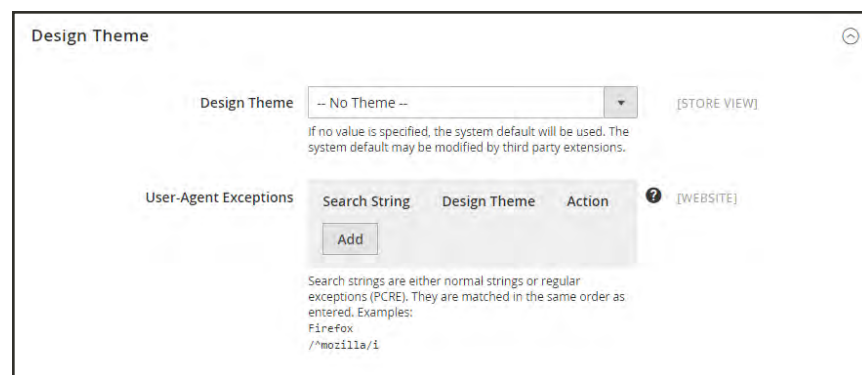
Magento Connect contains a wide selection of extensions that you can install to enhance the appearance of your store. The following example shows how to add a mobile theme from Magento Connect.

Step 1: Install a New Theme

1. On the Admin sidebar, tap **Find Partners & Extensions**.
2. Under Magento Marketplace, tap **Visit Magento Marketplaces**.
3. Find the Magento 2 theme that you want to install, and follow the instructions to install the theme on your server.

Step 2: Apply the Theme to Your Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Design**.
3. Expand  the **Themes** section.
4. Set **Design Theme** to the new theme.



Design Theme

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

Theme Assets

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

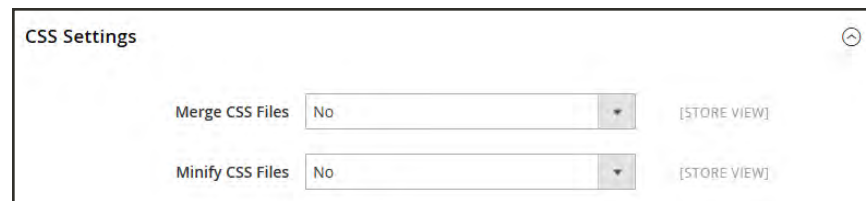
FOLDER	DESCRIPTION
CSS	Contains the CSS files that control the visual styling that is associated with the skin.
fonts	Contains any additional fonts that are used by the theme and that are not available by default on most systems.
images	Contains all images used by the theme, including buttons, background images, and so on.

Merging CSS Files

As part of an effort to optimize your site and reduce page load time, you can reduce the number of separate CSS files by merging them into a single condensed file. If you open a merged CSS file, you'll find one continuous stream of text, with line breaks removed. Because you can't edit the merged file, it's best to wait until you are out of the development mode, and no longer making frequent changes to the CSS.

To merge CSS files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand  the **CSS Settings** section.



Merge CSS Files	No	[STORE VIEW]
Minify CSS Files	No	[STORE VIEW]

CSS Settings

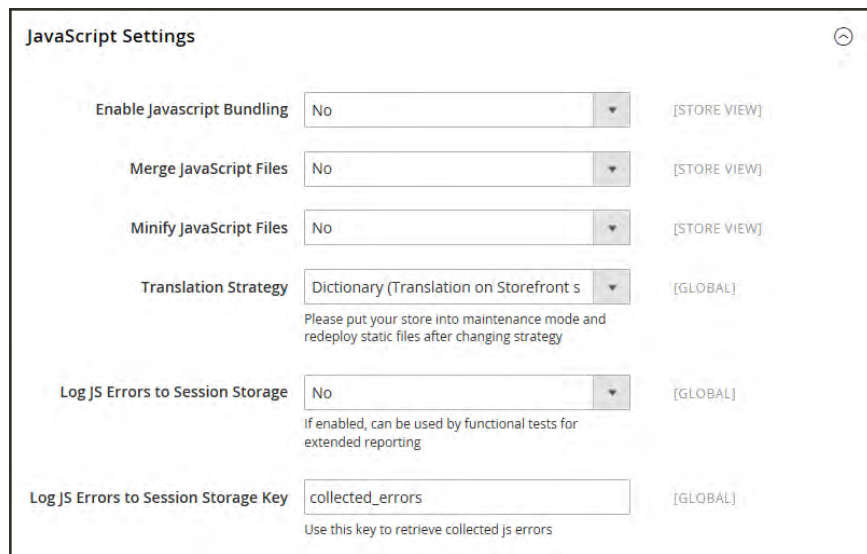
4. Set **Merge CSS Files** to “Yes.”
5. When complete, tap **Save Config**.

Merging JavaScript Files

Multiple JavaScript files can be merged into a single, condensed file to reduce page load time. If you open a merged JavaScript file, you'll find one continuous stream of text, with line breaks removed. If you are finished with the development process, and the code contains no errors, you might consider merging the files.

To merge JavaScript files:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Developer**.
3. Expand ☺ the **JavaScript Settings** section.



The screenshot shows the 'JavaScript Settings' configuration panel. It contains several settings, each with a dropdown menu and a scope indicator:

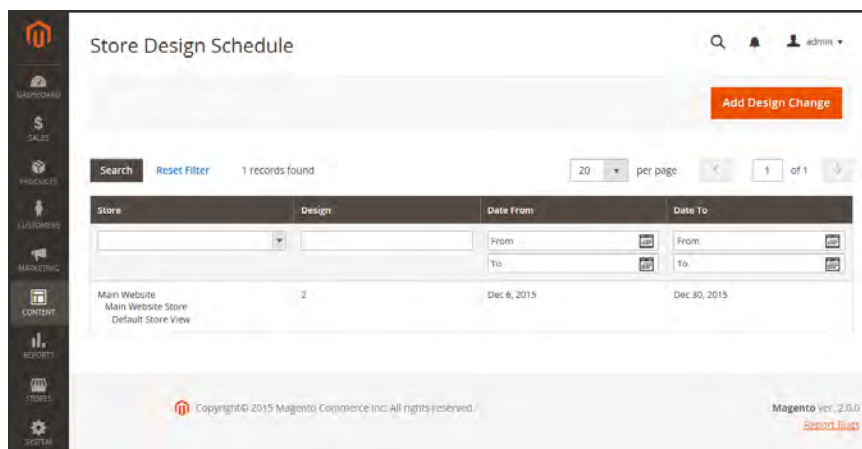
- Enable Javascript Bundling**: Set to 'No', scope [STORE VIEW]
- Merge JavaScript Files**: Set to 'No', scope [STORE VIEW]
- Minify JavaScript Files**: Set to 'No', scope [STORE VIEW]
- Translation Strategy**: Set to 'Dictionary (Translation on Storefront s)', scope [GLOBAL]. Below this setting is a note: 'Please put your store into maintenance mode and redeploy static files after changing strategy'.
- Log JS Errors to Session Storage**: Set to 'No', scope [GLOBAL]. Below this setting is a note: 'If enabled, can be used by functional tests for extended reporting'.
- Log JS Errors to Session Storage Key**: Set to 'collected_errors', scope [GLOBAL]. Below this setting is a note: 'Use this key to retrieve collected js errors'.

JavaScript Settings

4. Set **Merge JavaScript Files** to “Yes.”
5. When complete, tap **Save Config**.

Scheduling Design Changes

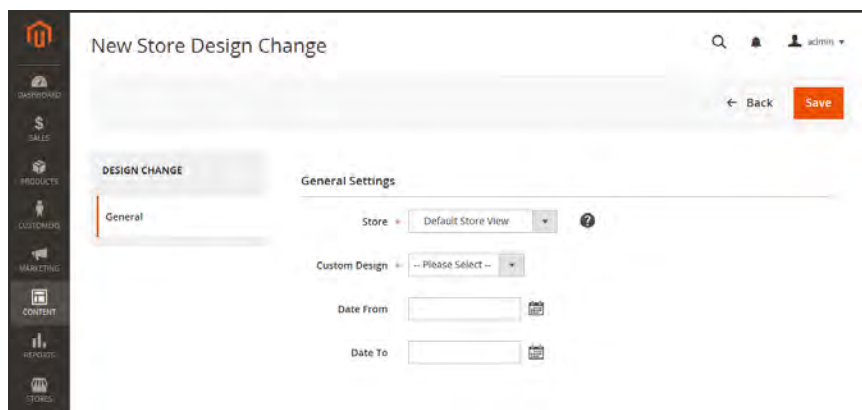
Design changes can be scheduled in advance, so they go into effect on schedule. You can use scheduled design changes for seasonal changes, promotions, or just to add variation.




Store Design Schedule

To schedule a design change:

1. On the Admin sidebar, tap **Content**. Then under **Design**, choose **Schedule**.
2. Tap **Add Design Change**. Then under General Settings, do the following:



New Design Change

- a. Set **Store** to the view where the change applies.
 - b. Set **Custom Design** to the theme, or variation of a theme, that is to be used.
 - c. To define the period when the change is in effect, use the calendar  to choose the values for the **Date From** and **Date To** fields.
3. When complete, tap **Save**.

CUSTOMERS

[Customers Menu](#)

[All Customers](#)

[Now Online](#)

[Customer Accounts](#)

[Customer Groups](#)

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- Customer Sign In

- Account Dashboard

- Configuring Customer Accounts

 - Online Session Length

 - Account Scope

 - Login Landing Page

 - New Account Options

 - Name and Address Options

 - Password Options

- Creating a New Account

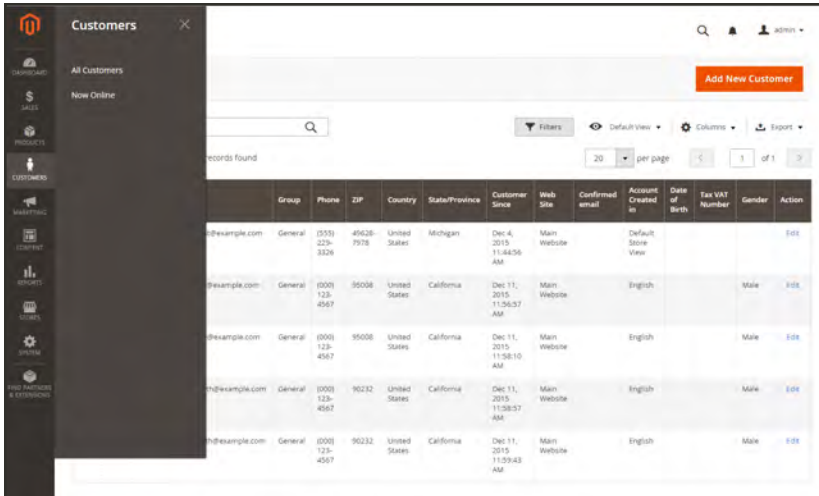
- Updating Customer Accounts

Customer Groups

CHAPTER 39:

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.



The screenshot shows the 'Customers' menu in the Magento admin interface. The menu is open, displaying a list of customer accounts. The table includes columns for Group, Phone, ZIP, Country, State/Province, Customer Since, Web Site, Confirmed email, Account Created in, State of Birth, Tax/VAT Number, Gender, and Action. The data is as follows:

Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	State of Birth	Tax/VAT Number	Gender	Action
General	(555) 223-3326	48428	United States	Michigan	Dec 4, 2015 11:48:56 AM	Main Website		Default Store View				Edit
General	(500) 123-4567	95008	United States	California	Dec 11, 2015 11:56:37 AM	Main Website	English				Male	Edit
General	(500) 123-4567	95008	United States	California	Dec 11, 2015 11:58:10 AM	Main Website	English				Male	Edit
General	(500) 123-4567	90232	United States	California	Dec 11, 2015 11:58:37 AM	Main Website	English				Male	Edit
General	(500) 123-4567	90232	United States	California	Dec 11, 2015 11:59:43 AM	Main Website	English				Male	Edit

Customers Menu

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.

All Customers

The Customers page lists all customers who have registered for an account with your store, or were added by the administrator.

ID	Name	Email	Group	Phone	ZIP	Country	State/Province	Customer Since	Web Site	Confirmed email	Account Created in	Date of Birth	Tax/VAT Number	Gender	Action
1	Veronica Costello	ron_cost@example.com	General	(555) 223-3326	49628-7978	United States	Michigan	Dec 4, 2015 11:44:56 AM	Main Website		Default Store View				Edit
2	Jane Doe	jane@doe@example.com	General	(000) 123-4567	90008	United States	California	Dec 11, 2015 11:26:57 AM	Main Website		English			Male	Edit
3	John Doe	john@doe@example.com	General	(000) 123-4567	90008	United States	California	Dec 11, 2015 11:58:10 AM	Main Website		English			Male	Edit
4	John Smith	johnsmith@example.com	General	(000) 123-4567	90232	United States	California	Dec 11, 2015 11:58:57 AM	Main Website		English			Male	Edit
5	Jane Smith	janesmith@example.com	General	(000) 123-4567	90232	United States	California	Dec 11, 2015 11:59:43 AM	Main Website		English			Male	Edit

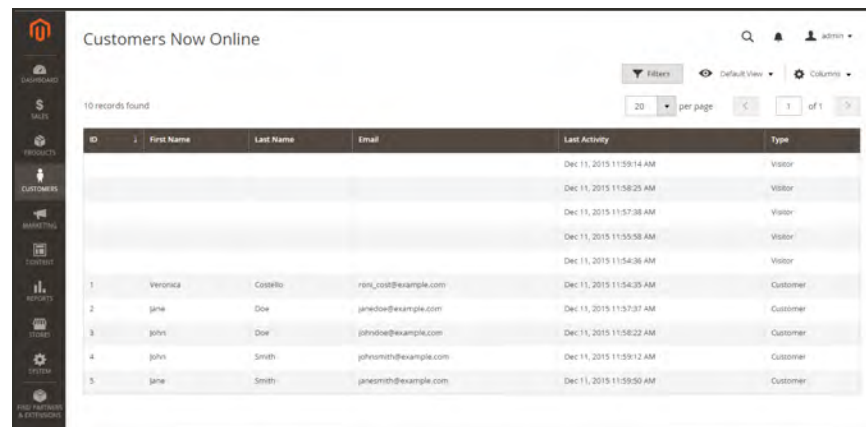
All Customers

To view customer information:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Open any customer record in edit mode.
3. In the panel on the left, choose the information you need to edit. Then, make the necessary changes.
4. When complete, tap **Save Customer**.

Now Online

The Now Online option on the Customers menu lists all customers and visitors who are currently online in your store. The length of the **online session** is set in the configuration, and determines how long the customer's activity is visible from the Admin. By default, a customer's online session lasts fifteen minutes.



ID	First Name	Last Name	Email	Last Activity	Type
				Dec 11, 2015 11:59:14 AM	Visitor
				Dec 11, 2015 11:58:25 AM	Visitor
				Dec 11, 2015 11:57:38 AM	Visitor
				Dec 11, 2015 11:55:58 AM	Visitor
				Dec 11, 2015 11:54:36 AM	Visitor
1	Veronica	Castello	ross.castello@example.com	Dec 11, 2015 11:54:25 AM	Customer
2	Jane	Doe	jane.doe@example.com	Dec 11, 2015 11:57:37 AM	Customer
3	John	Doe	john.doe@example.com	Dec 11, 2015 11:58:22 AM	Customer
4	John	Smith	john.smith@example.com	Dec 11, 2015 11:59:12 AM	Customer
5	Jane	Smith	jane.smith@example.com	Dec 11, 2015 11:59:50 AM	Customer

Online Customers

To see all customers who are online now:

1. On the Admin sidebar, tap **Customers**. Then, choose **Online Now**.
2. In the list, open any record to view the customer's information and activity.



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 starting date and time of the current 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.

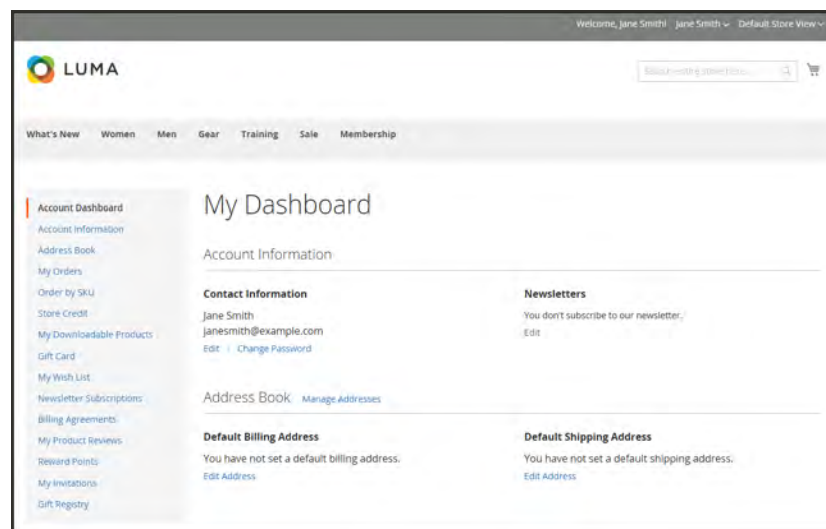
CHAPTER 40:

Customer Accounts

The header of every page in your store extends an invitation for shoppers to “Log in or register” for an account with your store. Customers who open an account with your store enjoy a range of benefits, including:

-  **Faster checkout.** Registered customers move through checkout faster because much of the information is already in their accounts.
-  **Self service.** Registered customers can update their information, check the status of orders, and even reorder from their account dashboard.

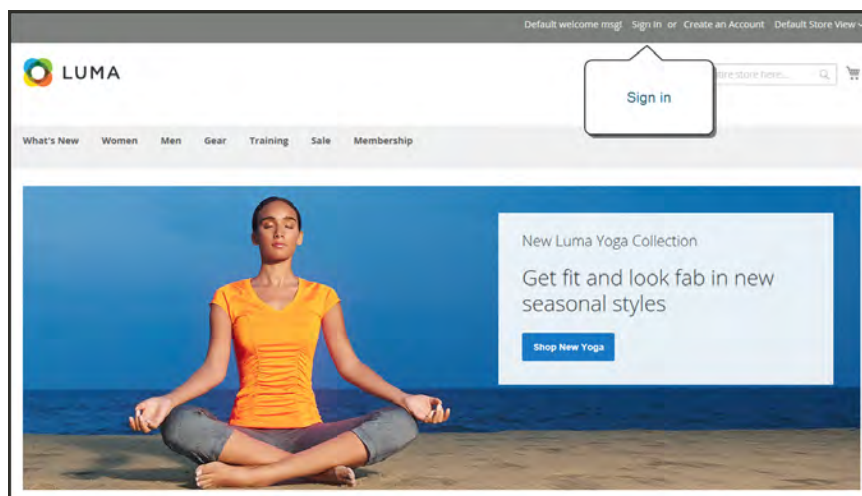
Customers can access their account dashboard by clicking the “My Account” link in the header of the store. They can use their account dashboard to view and modify their information, including past and current addresses, billing and shipping preferences, newsletter subscriptions, wishlist, and more.



Account Dashboard

Customer Sign In

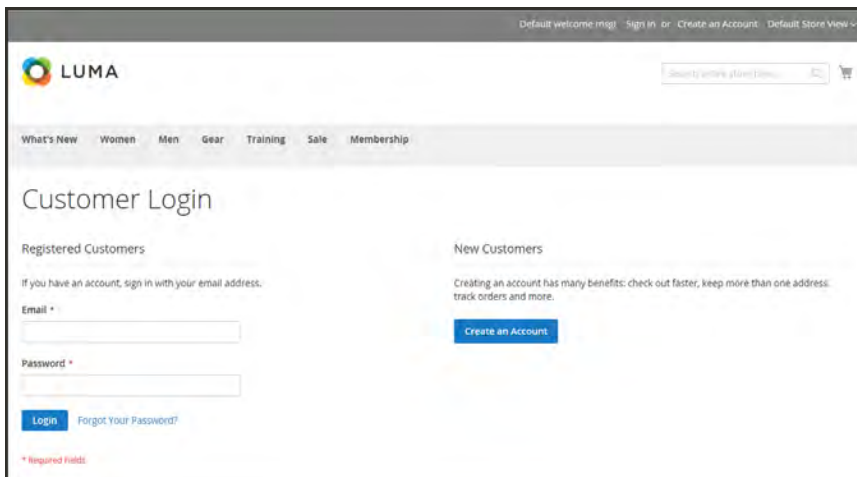
Customers have easy access to their accounts from every page in your store. Depending on the configuration, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts. When customers forget their passwords, a reset link is sent to the email address that is associated with the account.



Sign In

To sign in to your customer account:

1. In the header of the store, tap **Sign in**.
2. When prompted, enter the **Email Address** that is associated with your account, and your **Password**. Then, tap **Login**.



Customer Login

To reset your password:

1. On the Login page, tap **Forgot Your Password?**.
2. When prompted, enter the **Email Address** that is associated with your account, and tap **Submit**.

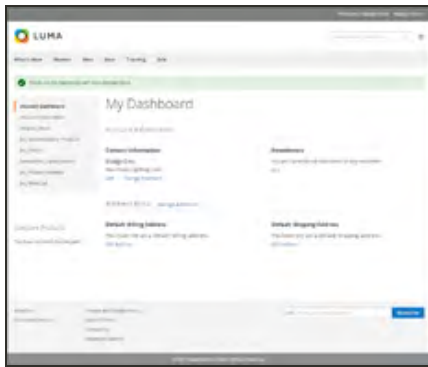
If the email address you entered matches the one that is associated with the account, you will receive a "Password Reset Confirmation" email with a link to reset your password.

3. Tap the link in the email, and when prompted, enter your **New Password**. Enter it again to confirm, and tap **Reset Password**.

Your new password must be six or more characters in length, without spaces.

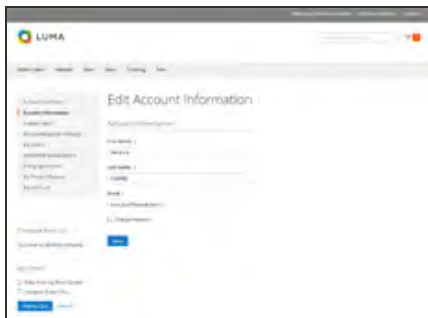
When you receive confirmation that the password is updated, you can use the new password to log in to your account.

Account Dashboard



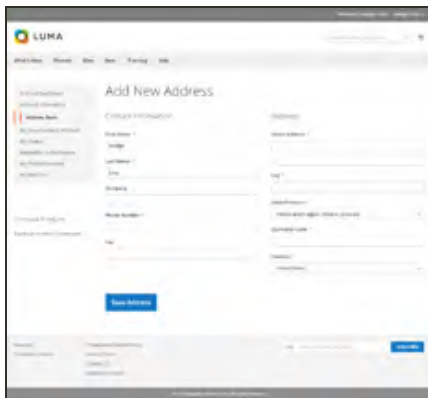
My Dashboard

The customer's account dashboard gives them the ability to track orders, manage shipping addresses, and manage other store activities.



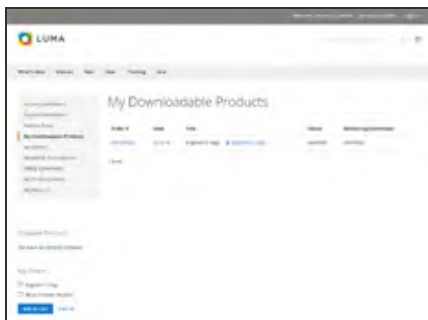
Account Information

Customers can update their account information and change their password as needed.



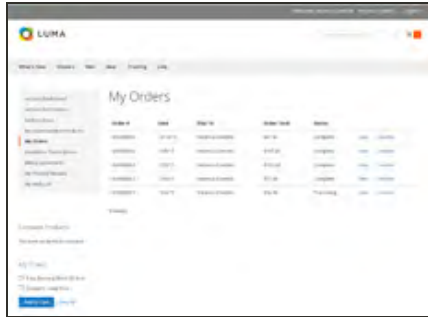
Address Book

The customer address book includes the default billing and shipping address, and additional address entries.



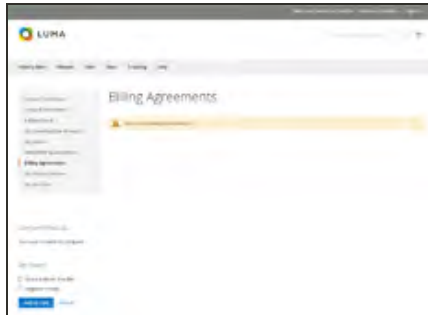
Downloadable Products

Lists all downloadable products the customer has purchased, with a link to each.



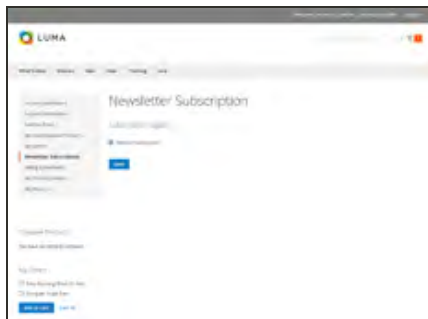
Orders

Displays a list of all customer orders, with a link to each. If enabled in the configuration, any order can be reordered by simply clicking the Reorder link.



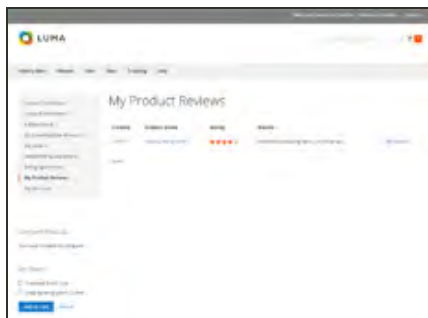
Billing Agreements

Displays a list of any customer billing agreements.



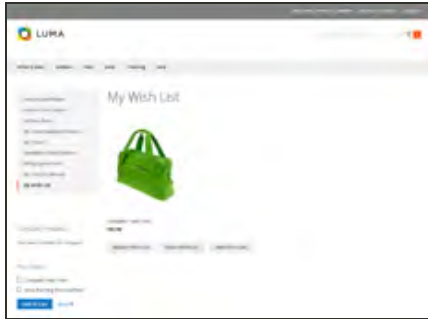
Newsletter Subscriptions

Lists all available newsletters. Those to which the customer is currently subscribed have a checkmark.



My Product Reviews

Displays a list of all product reviews submitted by the customer, with a link to each.



My Wish List

This section is a placeholder for API applications that link the customer account to other applications or extensions.

Configuring Customer Accounts

The customer account settings determine the information that is collected during customer registration, and the experience that customers have during the process. Customer configuration settings include:

- [Online Session Length](#)
- [Account Scope](#)
- [Login Landing Page](#)
- [New Account Options](#)
- [Name and Address Options](#)
- [Password Options](#)

Online Session Length

The length of each customer session is set by default to fifteen minutes. If there is no keyboard activity during that time, the current session ends, and customers must log back into their accounts to continue shopping. If **Persistent Cart** is enabled, the contents of their carts are saved for the next time they sign in to their accounts.

To configure the online session length:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Online Now**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Online Customers Options** section.
4. In the **Online Minutes Interval** field, enter the number of minutes before the customer session. Leave the field empty to accept the default interval of fifteen minutes.



Online Customers Options

Online Minutes Interval [GLOBAL]

Leave empty for default (15 minutes).

Online Customers Options

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

Account Scope

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

To set the scope of customer accounts:

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



Account Sharing Options

4. Set **Share Customer Accounts** to one of the following:

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

Login Landing Page

You can configure your store to redirect customers to their account dashboard after they log in, or let them continue shopping.

To set the login landing page:

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



Login Options

4. Set **Redirect Customer to Account Dashboard after Logging in** to one of the following:

Yes	The account dashboard appears when customers log in to their accounts.
No	Customers can continue shopping after logging in to their accounts.
5. When complete, tap **Save Config**.

New Account Options

In the Create New Account Options section of the configuration, the basic account options are combined with more advanced options that relate to VAT ID Validation and custom integrations. The following instructions cover only the most frequently used options. To learn about automatic customer group assignments, see: [VAT Validation](#).

Create New Account Options

Enable Automatic Assignment to Customer Group	No	[STORE VIEW]
Default Group	General	[STORE VIEW]
Default Value for Disable Automatic Group Changes Based on VAT ID	No	[GLOBAL]
Show VAT Number on Storefront	No	[WEBSITE]
	To show VAT number on Storefront, set Show VAT Number on Storefront option to Yes.	
Default Email Domain	example.com	[STORE VIEW]
Default Welcome Email	New Account (Default)	[STORE VIEW]
	Email template chosen based on theme fallback when "Default" option is selected.	
Default Welcome Email Without Password	New Account Without Password (Default)	[STORE VIEW]
	This email will be sent instead of the Default Welcome Email, if a customer was created without password.	
	Email template chosen based on theme fallback when "Default" option is selected.	
Email Sender	General Contact	[STORE VIEW]
Require Emails Confirmation	No	[WEBSITE]
Confirmation Link Email	New Account Confirmation Key (Default)	[STORE VIEW]
	Email template chosen based on theme fallback when "Default" option is selected.	
Welcome Email	New Account Confirmed (Default)	[STORE VIEW]
	This email will be sent instead of the Default Welcome Email, after account confirmation.	
	Email template chosen based on theme fallback when "Default" option is selected.	
Generate Human-Friendly Customer ID	No	[GLOBAL]

Create New Account Options

To set up the basic customer account options:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Customers**, choose **Customer Configuration**.
3. Expand ☺ the **Create New Account Options** section. Then, do the following:
 - a. Set **Default Group** to the customer group that is assigned to new customers when an account is created.
 - a. If you have a Value Added Tax number, and want it to be visible to customers, set **Show VAT Number on Storefront** to “Yes.”
 - b. Enter the **Default Email Domain** for the store. For example: mystore.com
 - c. Set **Default Welcome Email** to the template that is used for the Welcome email sent to new customers.
 - d. Set **Default Welcome Email without Password** to the template that is used when a customer account is created that does not yet have a password. For example, a customer account created from the Admin does not yet have a password assigned.
 - e. Set **Email Sender** to the store contact that appears as the sender of the Welcome email.
 - f. To require that customers confirm their request to open an account with your store, set **Require Emails Confirmation** to “Yes.” Then, set **Confirmation Link Email** to the template that is used for the confirmation email.
 - g. Set **Welcome Email** to the template that is used for the Welcome message that is sent after the account is confirmed.
4. When complete, tap **Save Config**.

Name and Address Options

The Name and Address Options determine the values in the drop-down lists for the prefix and suffix part of the customer name.

To configure the customer name and address:

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

The screenshot shows the 'Name and Address Options' configuration panel. It contains several settings, each with a text input field or a dropdown menu and a '[WEBSITE]' label to its right. The settings are:

- Number of Lines in a Street Address:** Text input field containing '2'. Below it, a note reads: 'Leave empty for default (2). Valid range: 1-4'.
- Show Prefix:** Dropdown menu with 'No' selected. Below it, a note reads: 'The title that goes before name (Mr., Mrs., etc.)'.
- Prefix Dropdown Options:** Text input field. Below it, a note reads: 'Semicolon (;) separated values. Put semicolon in the beginning for empty first option. Leave empty for open text field.'
- Show Middle Name (initial):** Dropdown menu with 'No' selected. Below it, a note reads: 'Always optional.'
- Show Suffix:** Dropdown menu with 'No' selected. Below it, a note reads: 'The suffix that goes after name (Jr., Sr., etc.)'.
- Suffix Dropdown Options:** Text input field. Below it, a note reads: 'Semicolon (;) separated values. Put semicolon in the beginning for empty first option. Leave empty for open text field.'
- Show Date of Birth:** Dropdown menu with 'No' selected.
- Show Tax/VAT Number:** Dropdown menu with 'No' selected.
- Show Gender:** Dropdown menu with 'No' selected.

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 determine the email templates that are used when customers forget their passwords, and the lifetime of the password recovery link. You can allow customers to change their own passwords, or require that only store administrators can do so.

To configure customer password options:

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

The screenshot shows the 'Password Options' configuration panel. It includes the following settings:

- Forgot Email Template:** A dropdown menu set to 'Forgot Password (Default)' with a '[STORE VIEW]' label. Below it, a note reads: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Remind Email Template:** A dropdown menu set to 'Remind Password (Default)' with a '[STORE VIEW]' label. Below it, a note reads: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Reset Password Template:** A dropdown menu set to 'Reset Password (Default)' with a '[STORE VIEW]' label. Below it, a note reads: 'Email template chosen based on theme fallback when "Default" option is selected.'
- Password Template Email Sender:** A dropdown menu set to 'Customer Support' with a '[STORE VIEW]' label.
- Recovery Link Expiration Period (days):** A text input field containing the number '1' with a '[GLOBAL]' label. Below it, a note reads: 'Please enter a number 1 or greater in this field.'

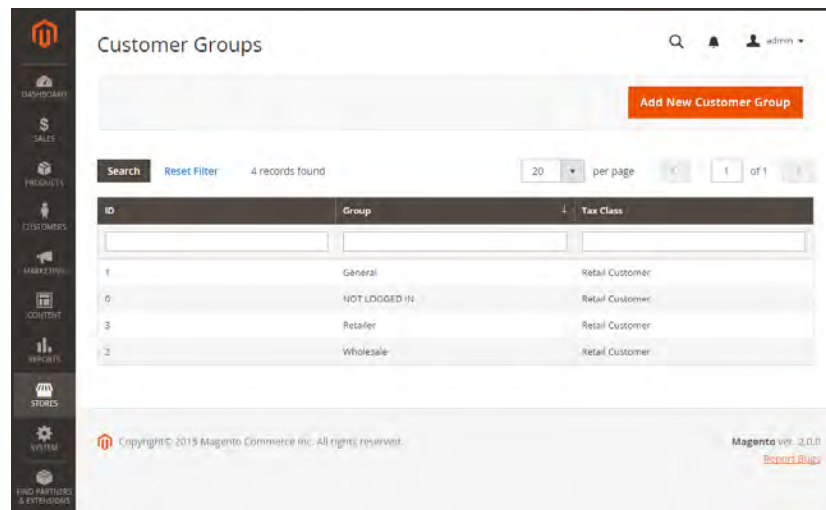
Password Options

- a. Set **Forgot Email Template** to the template that is used for the email sent to customers who have forgotten their passwords.
 - b. Set **Remind Email Template** to the template that is used when a password hint is sent to customers.
 - c. Set **Forgot and Remind Email Sender** to the **store contact** that appears as the sender of the Forgot Email and Remind Email notifications.
 - d. In the **Recovery Link Expiration Period** field, enter the number of days before the password recovery link expires.
 - e. To require that only the store administrator can change customer passwords, set **Require admin user to change user password** to “Yes.”
4. When complete, tap **Save Config**.

CHAPTER 41:

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 under **Other Settings**, choose **Customer Groups**.
2. Tap **Add New Customer Group**. Then, do the following:
 - a. Enter a unique **Group Name** less than 32 characters to identify the group.
 - b. Select the **Tax Class** that applies to the group.

Group Information

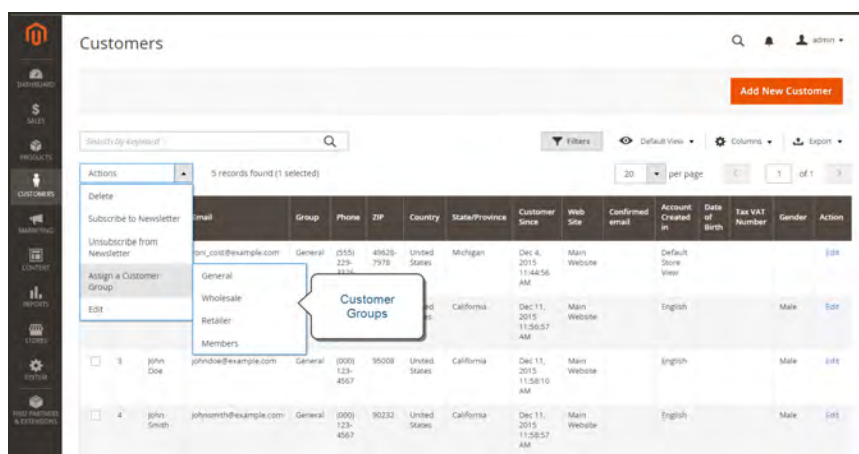
3. When complete, tap **Save Customer Group**.

To edit a customer group:

1. On the Admin sidebar, tap **Stores**. Then under **Other Settings**, choose **Customer Groups**.
2. Open the record in edit mode.
3. Make the necessary changes.
4. When complete, tap **Save Customer Group**.

To assign a customer to a different group:

1. On the Admin sidebar, tap **Customers**. Then, choose **All Customers**.
2. Find the customer in the list, and mark the checkbox in the first column. Then, do the following:
 - a. Set the **Actions** control to “Assign a Customer Group.”
 - b. Set the **Group** control to the new group.
 - c. When prompted to confirm, tap **OK**.



Assign a Customer Group

SALES

Sales Menu

Point of Purchase

Order Management

Payments

Shipping

Contents

Sales Menu

Point of Purchase

Shopping Cart

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Order Management

Orders

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Payments

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PayPal

Other Payment Solutions

Shipping

Shipping Settings

Basic Shipping Methods

Carriers

Shipping Labels

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.



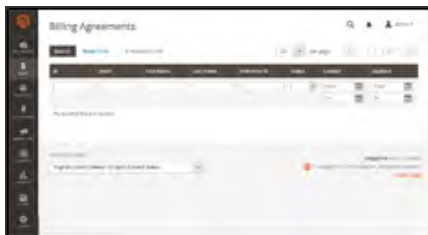
Invoices

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.



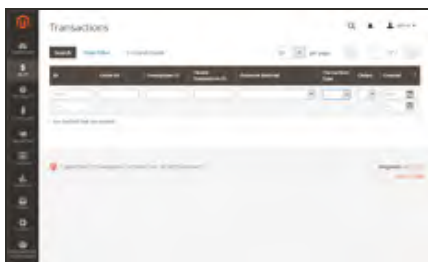
Shipments

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.



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.

Order Management

In this section of the guide, you will learn about each stage of the order workflow, and how to process orders, create invoices, and shipments. You will also learn how to issue credit memos and manage returns.

Contents

Orders

- Order Workspace

 - Order Actions

 - Order Search

 - Grid Layout

- Order Workflow

 - Processing Orders

 - Allow Reorders

- Order Status

 - Order Status Workflow

 - Custom Order Status

- Scheduled Operations

 - Pending Payment Order Lifetime

 - Scheduled Grid Updates

Invoices

- Printing Multiple Invoices

Billing Agreements

Shipments

Transactions

Credit Memos

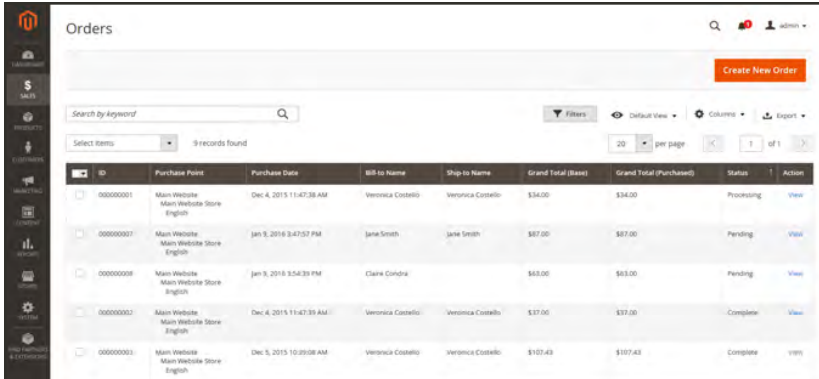
- Printing Credit Memos

- Product Return Workflow

CHAPTER 43:

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.



ID	Purchase Point	Purchase Date	Bill to Name	Ship to Name	Grand Total (Base)	Grand Total (Purchase)	Status	Action
00000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View
00000007	Main Website Main Website Store English	Jan 9, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$87.00	\$87.00	Pending	View
00000008	Main Website Main Website Store English	Jan 9, 2016 5:54:39 PM	Clare Condra		\$63.00	\$63.00	Pending	View
00000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	View
00000003	Main Website Main Website Store English	Dec 5, 2015 10:29:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	View

Orders

Workspace Controls

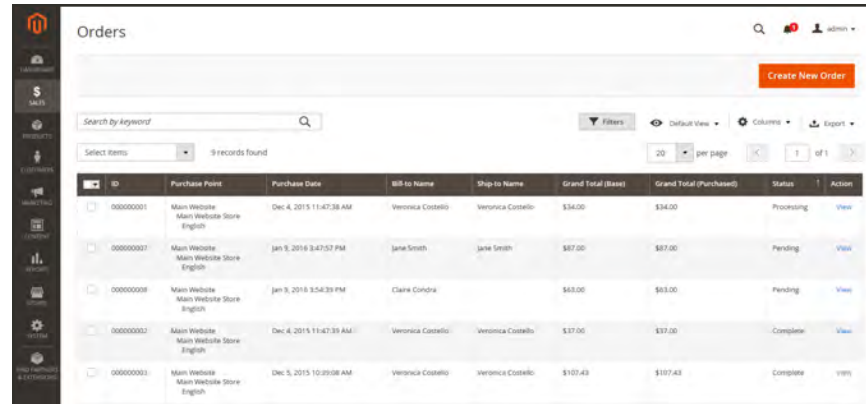
CONTROL	DESCRIPTION
Search	Initiates a search for orders based on keywords entered in the search box, and current filters.
<input type="button" value="Create New Order"/>	Creates a new order.
<input type="button" value="Go to Archive"/>	Displays the list of archived orders.
Search	Initiates a search for orders based on the current filters.
Reset Filter	Restores all filters to a blank state.
Actions	<p>Lists all actions that can be applied to selected orders. To apply an action to an order, or group of orders, mark the checkbox in the first column of each order. Order actions:</p> <ul style="list-style-type: none"> Cancel Hold Unhold Print Invoices Print Packing Slips Print Credit Memos Print All Move to Archive
Mass Actions	<p>Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options: Select All, Unselect All, Select Visible, and Unselect Visible</p>
<input type="button" value="Submit"/>	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

Columns

COLUMN	DESCRIPTION
Selection State	Filters the list of orders based on checkbox status. Options: <ul style="list-style-type: none"> Any Lists all records, regardless of checkbox status. Yes Lists only records with the checkbox marked. No Lists only records without the checkbox marked.
ID	A unique, sequential number that is assigned when a new order is saved for the first time.
Purchase Point	Identifies the store view where the order was placed.
Purchase Date	The date the order was placed.
Bill-to Name	The name of the person who is responsible to pay for the order.
Ship-to Name	The name of the person to whom the order is to be shipped.
Grand Total (Base)	The grand total of the order.
Grand Total (Purchased)	The grand total of products purchased in the order.
Status	The current order status.
Action	The View link opens the order.

Order Workspace

The Order workspace lists all current orders. Each row in the grid represents a customer order, and each column represents an attribute, or data field . Use the standard **controls** to sort and filter the list, find orders, and apply **actions** to selected orders. From the grid, you can view existing orders, and create new orders. The tabs above the pagination controls are used to filter the list, change the default view, change and rearrange columns, and export data.

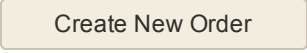
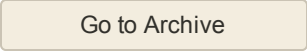
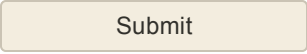


The screenshot shows the 'Orders' workspace in a Magento system. It features a search bar, a 'Create New Order' button, and a table of orders. The table has the following columns: ID, Purchase Point, Purchase Date, Bill to Name, Ship to Name, Grand Total (Base), Grand Total (Purchased), Status, and Action. There are 9 records found, with 20 per page.

ID	Purchase Point	Purchase Date	Bill to Name	Ship to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View
000000007	Main Website Main Website Store English	Jan 9, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$87.00	\$87.00	Pending	View
000000009	Main Website Main Website Store English	Jan 9, 2016 3:54:39 PM	Claire Concha		\$63.00	\$63.00	Pending	View
000000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	View
000000003	Main Website Main Website Store English	Dec 5, 2015 10:29:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	View

Orders

Workspace Controls

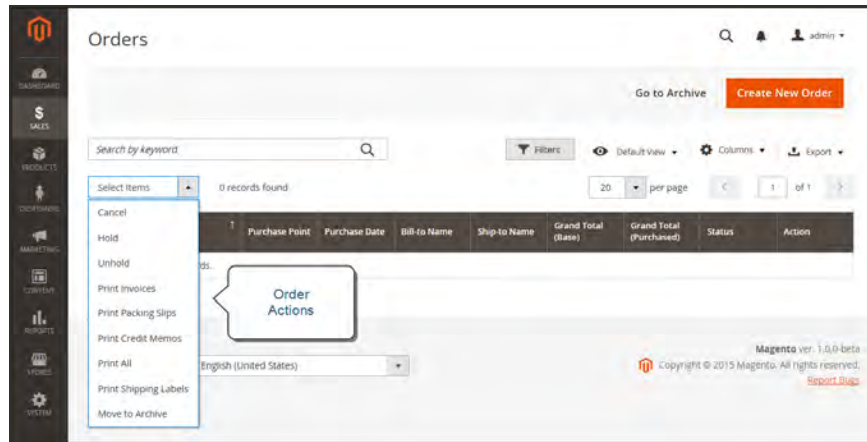
CONTROL	DESCRIPTION
Search	Initiates a search for orders based on keywords entered in the search box, and current filters.
	Creates a new order.
	Displays the list of archived orders.
Search	Initiates a search for orders based on the current filters.
Reset Filter	Restores all filters to a blank state.
Actions	<p>Lists all actions that can be applied to selected orders. To apply an action to an order, or group of orders, mark the checkbox in the first column of each order. Order actions:</p> <ul style="list-style-type: none"> Cancel Hold Unhold Print Invoices Print Packing Slips Print Credit Memos Print All Move to Archive
Mass Actions	Can be used to select multiple records as the target of action. Mark the checkbox in the first column of each record that is subject to the action. Options: Select All, Unselect All, Select Visible, and Unselect Visible
	Applies the current action to the selected order records.
Edit	Opens the order in edit mode.

Columns

COLUMN	DESCRIPTION						
Selection State	Filters the list of orders based on checkbox status. Options: <table border="0"> <tr> <td>Any</td> <td>Lists all records, regardless of checkbox status.</td> </tr> <tr> <td>Yes</td> <td>Lists only records with the checkbox marked.</td> </tr> <tr> <td>No</td> <td>Lists only records without the checkbox marked.</td> </tr> </table>	Any	Lists all records, regardless of checkbox status.	Yes	Lists only records with the checkbox marked.	No	Lists only records without the checkbox marked.
Any	Lists all records, regardless of checkbox status.						
Yes	Lists only records with the checkbox marked.						
No	Lists only records without the checkbox marked.						
ID	A unique, sequential number that is assigned when a new order is saved for the first time.						
Purchase Point	Identifies the store view where the order was placed.						
Purchase Date	The date the order was placed.						
Bill-to Name	The name of the person who is responsible to pay for the order.						
Ship-to Name	The name of the person to whom the order is to be shipped.						
Grand Total (Base)	The grand total of the order.						
Grand Total (Purchased)	The grand total of products purchased in the order.						
Status	The current order status. Options:						
Action	The View link opens the order.						

Order Actions

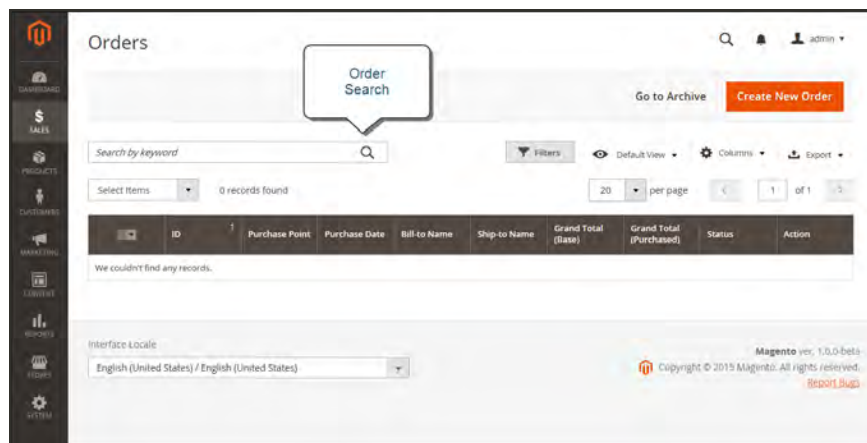
To apply an action to specific orders, mark the checkbox in the first column of each order. To select or deselect all orders, use the control at the top of the column.



Order Actions


Order Search

The Search box in the upper-left of the Orders grid can be used to find specific orders by keyword, or by filtering the order records that appear in the grid..



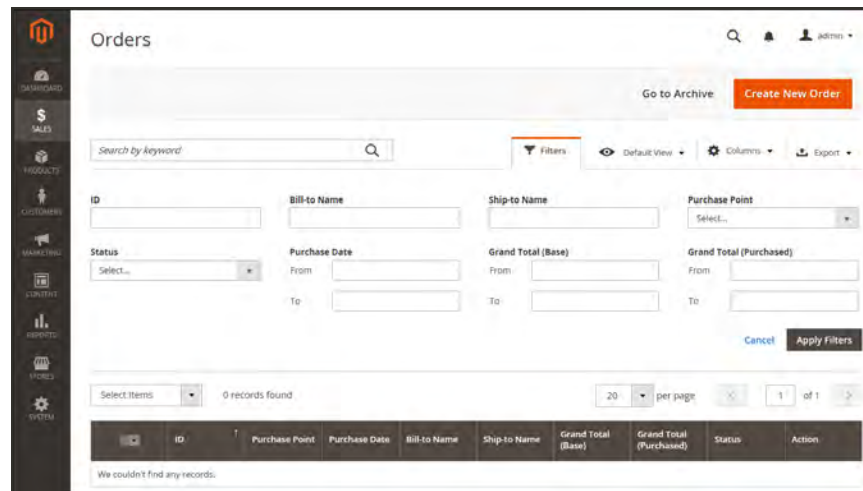
Search Results

To search for a match:

1. Enter a search term into the page search box.
2. Tap **Search**  to display the results.

To filter the search:

1. Tap the **Filters** ▾ tab to display the selection of search filters.
2. Complete as many of the filters as needed to describe the order(s) that you want to find.
3. Tap **Apply Filters** to display the results.



Order Filters

Search Filters

FILTER	DESCRIPTION
ID	Filters the search based on order ID.
Bill-to Name	Filters the search by the name of the person who is responsible to pay for the order.
Ship-to Name	Filters the search by the name of the person to whom each order is shipped .
Purchase Point	Filters the search by website, store, or store view where the order was placed.
Status	Filters the search based on order status. Options: Canceled Closed Complete Suspected Fraud On Hold

Search Filters (cont.)

FILTER	DESCRIPTION
	Payment Review
	PayPal Canceled Reversal
	Pending
	Pending Payment
	Processing
Purchase Date	Filters the search based on the date purchased. To find orders within a range of dates, enter both the From and To dates.
Grand Total (Base)	Filters the search based on the Grand Total of each order.
Grand Total (Purchased)	Filters the search based on Grand Total of items purchased in each order.
<input type="button" value="Apply Filters"/>	Applies all filters to the search.
Cancel	Cancels the current search.
Clear All	Clears all search filters.

Order Grid Layout

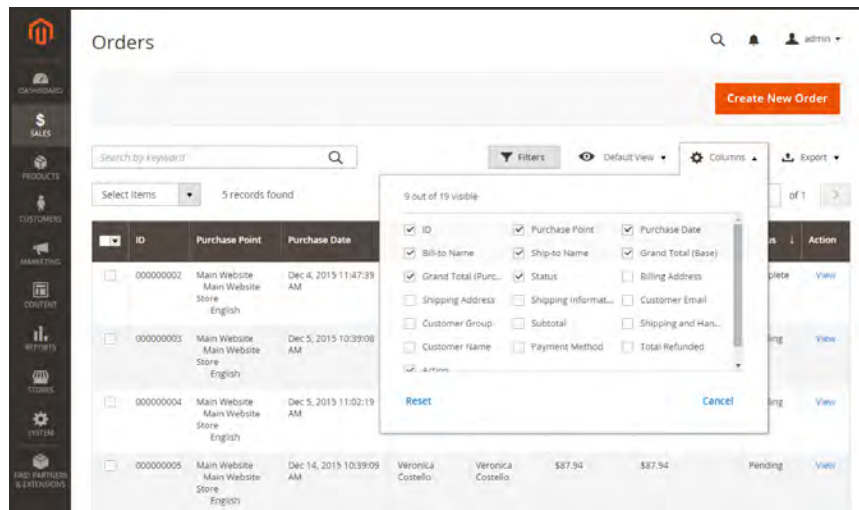
The selection of columns and their order in the grid can be changed according to your preference. The new layout can be saved as a grid “view.” By default, only nine of twenty available columns are included in the grid.

To change the selection of columns:

In the upper-right corner, tap the **Columns**  control. Then, do the following:

- Mark the checkbox of any column you want to add to the grid.
- Clear the checkbox of any column you want to remove from the grid.

Make sure to scroll down to see all available columns.





Order Grid Columns

To move a column:

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


To save a grid view :

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

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

To change the view:

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

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

Order Workflow

When a customer places an order, a sales order is created as a temporary record of the transaction. In the Orders grid, sales orders initially have a status of "Pending," and can be canceled at any time until the payment is processed. After payment is confirmed, the order can be invoiced and shipped.

1

Place Order. The checkout process begins when the shopper clicks the Go to Checkout button on the shopping cart page or **reorders** directly from their customer account.

2

Order Pending. In the Orders grid, the status of the sales order is initially "Pending." Payment has not been processed, and the order can still be canceled.

3

Receive Payment. The status of the order changes to "Processing." when payment is received or authorized. Depending on the payment method, you might receive notification when the transaction is authorized or processed.

4

Invoice Order. An order is typically invoiced after payment is received. Some payment methods generate an invoice automatically when payment is authorized and captured. The payment method determines which invoicing options are needed for the order. After the invoice is generated and submitted, a copy is sent to the customer.

5

Ship Order. The shipment is submitted, and the packing slip and shipping label are printed. The customer receives notification, and the package is shipped. If tracking numbers are used, the shipment can be tracked from the customer's account.

Processing Orders

When a customer places an order, a sales order is created as a temporary record of the transaction. The sales order has a status of “Pending” until payment is received. Sales orders can be canceled until an invoice is generated. An easy way to think of it is this: Orders become invoices, and invoices become shipments. The Orders grid lists all orders, regardless of where they are in the workflow.

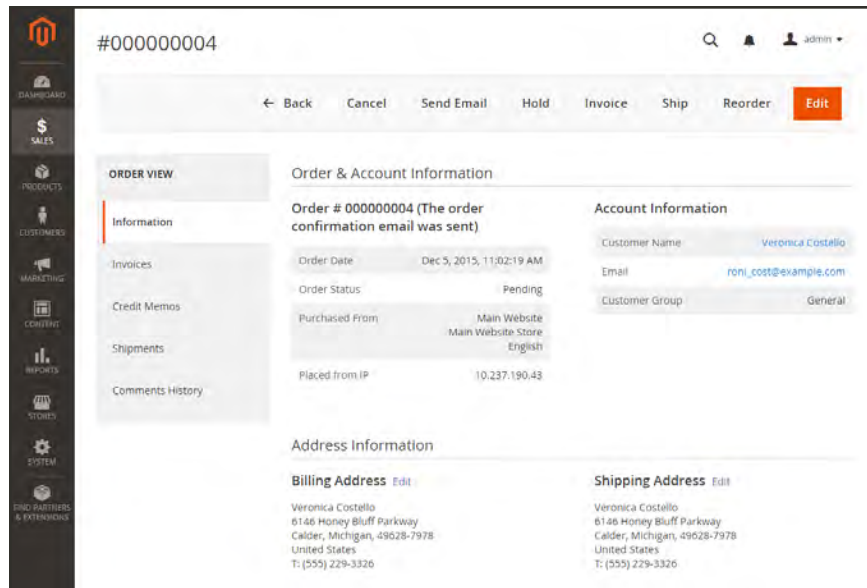
The screenshot shows the 'Orders' grid in a Magento administration interface. The grid contains five records. The status of the orders varies: two are 'Complete', two are 'Pending', and one is 'Processing'. The 'Action' column for each record contains a 'View' link.

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000002	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	View
000000003	Main Website Main Website Store English	Dec 5, 2015 10:39:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	View
000000004	Main Website Main Website Store English	Dec 5, 2015 11:02:19 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Pending	View
000000005	Main Website Main Website Store English	Dec 14, 2015 10:39:09 AM	Veronica Costello	Veronica Costello	\$87.94	\$87.94	Pending	View
000000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View

Orders

To view an order:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Orders**.
2. Find the order in the grid, and in the **Action** column, click **View**.
 - A pending order can be modified, put on hold, canceled, or invoiced and shipped.
 - A completed order can be reordered.



View Order

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.

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.

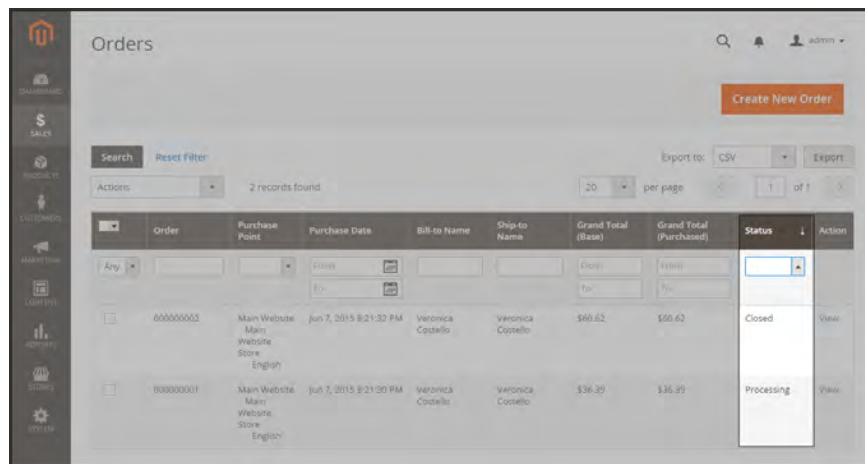
A screenshot of the Magento Admin configuration panel for the 'Reorder' section. The panel has a title 'Reorder' in the top left and a collapse icon in the top right. Below the title, there is a label 'Allow Reorder' followed by a dropdown menu currently set to 'Yes'. To the right of the dropdown is a link labeled '[STORE VIEW]'.

Reorder

4. Set **Allow Reorder** to your preference.

Order Status

All orders have an order status that is associated with a stage in the order processing workflow. The status of each order is shown in the Status column of the Orders grid. Your store has a set of predefined order status and order state settings. The order state describes the position of an order in the workflow.

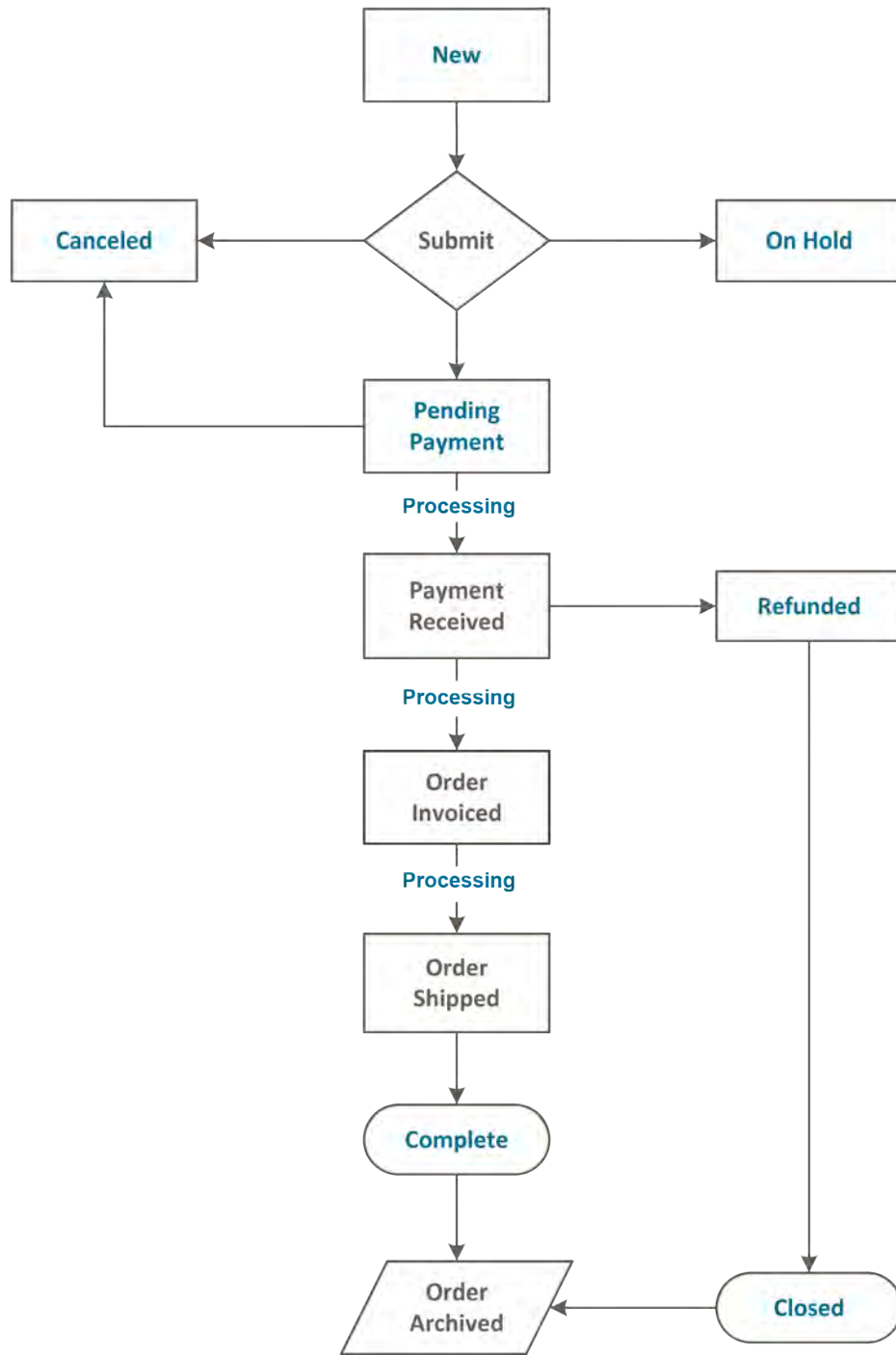


Order Status

Predefined Order Status

ORDER STATUS	ORDER STATE
Processing	New
Suspected Fraud	Pending Payment
Pending Payment	Processing
Payment Review	Complete
Suspected Fraud	Closed
Pending	Canceled
On Hold	On Hold
Complete	Payment Review
Closed	
Canceled	
PayPal Canceled Reversal	
Pending PayPal	
PayPal Reversed	

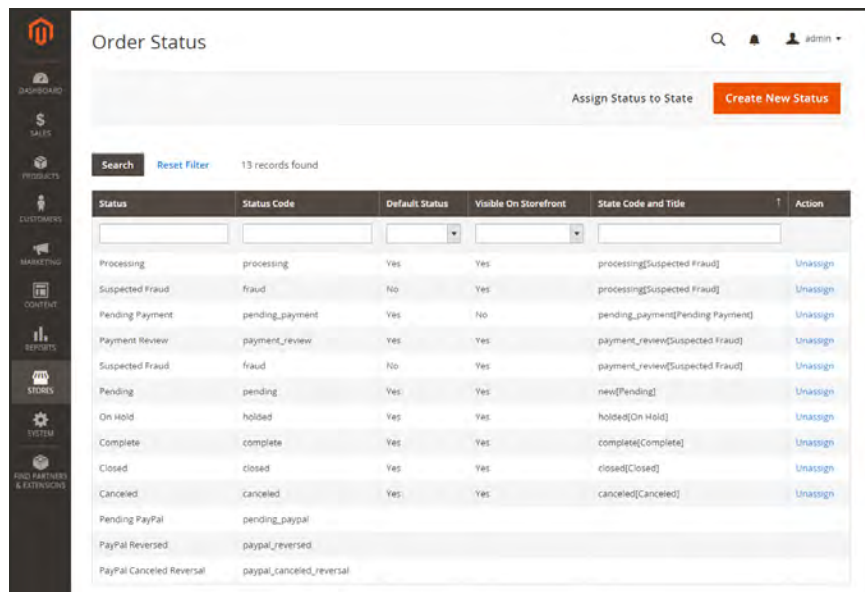
Order Status Workflow



Custom Order Status

In addition to the preset order status settings, you can create custom order status settings of your own, assign them to order states, and set a default order status for order states. For example, you might need a custom order status for orders such as “packaging” or “backordered,” or for a status that is specific to your needs. You can create a descriptive name for the custom status, and assign it to the associated order state in the workflow.

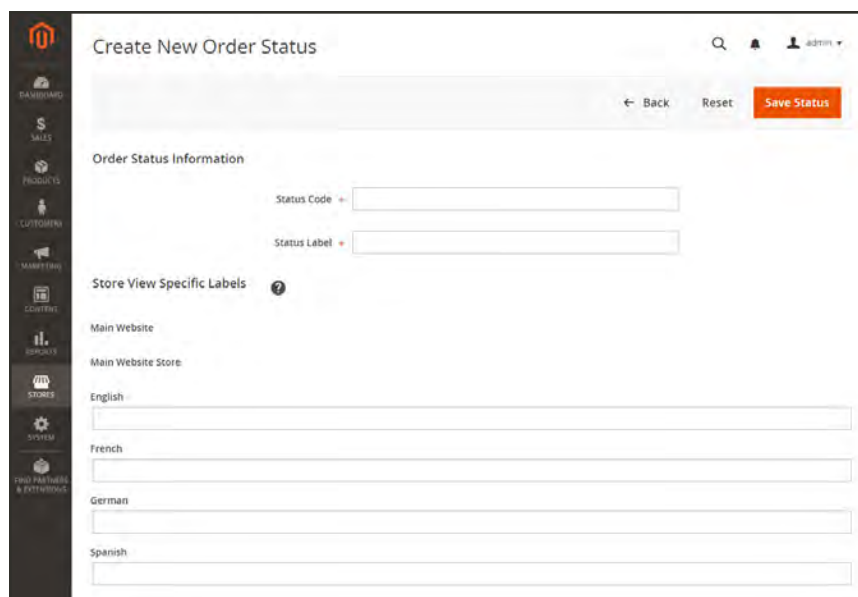
Only default custom order status values are used in the order workflow. Custom status values that are not set as default can be used only in the comments section of the order.



Order Status Settings

To create a custom order status:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Order Status**.
2. In the upper-right corner, tap **Create New Status**.

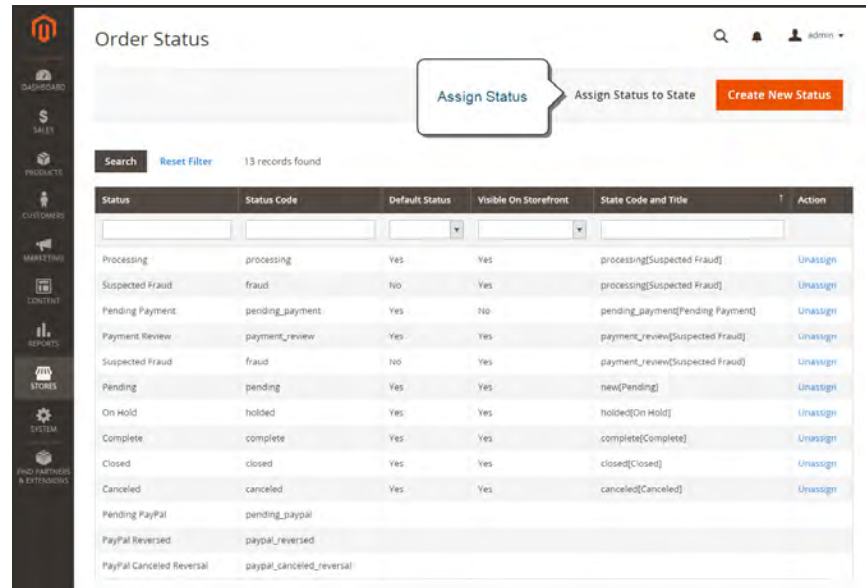
The screenshot shows the 'Create New Order Status' form in the Magento Admin interface. The form is titled 'Create New Order Status' and has a search icon, a notification bell, and a user profile icon in the top right corner. Below the title, there are three buttons: 'Back', 'Reset', and 'Save Status'. The form is divided into two main sections: 'Order Status Information' and 'Store View Specific Labels'. The 'Order Status Information' section contains two input fields: 'Status Code' and 'Status Label'. The 'Store View Specific Labels' section contains a list of store views with corresponding input fields: 'Main Website', 'Main Website Store', 'English', 'French', 'German', and 'Spanish'. The 'Stores' menu item is highlighted in the left sidebar.

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**.

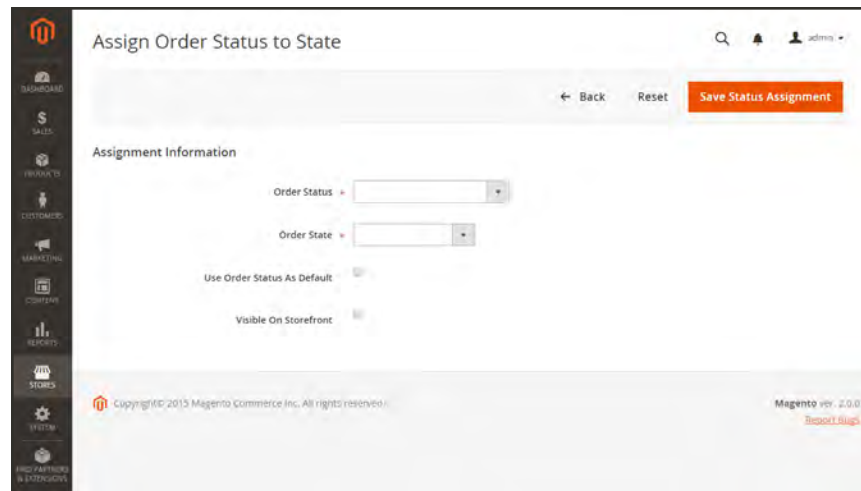
To assign an order status to a state:

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.

Scheduled Order Operations

Magento **cron** jobs can be used to schedule the following order management tasks:

- **Pending Payment Order Lifetime**
- **Scheduled Grid Updates**

ID	Purchase Point	Purchase Date	Bill to Name	Ship to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
000000001	Main Website Main Website Store English	Dec 4, 2015 11:47:38 AM	Veronica Costello	Veronica Costello	\$34.00	\$34.00	Processing	View
000000007	Main Website Main Website Store English	Jan 5, 2016 3:47:57 PM	Jane Smith	Jane Smith	\$87.00	\$87.00	Pending	View
000000008	Main Website Main Website Store English	Jan 5, 2016 3:54:39 PM	Clara Condra		\$63.00	\$63.00	Pending	View
000000003	Main Website Main Website Store English	Dec 4, 2015 11:47:39 AM	Veronica Costello	Veronica Costello	\$37.00	\$37.00	Complete	View
000000005	Main Website Main Website Store English	Dec 5, 2015 10:29:08 AM	Veronica Costello	Veronica Costello	\$107.43	\$107.43	Complete	View

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 ☺

Pending Payment Order Lifetime (minutes) [WEBSITE]

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.”



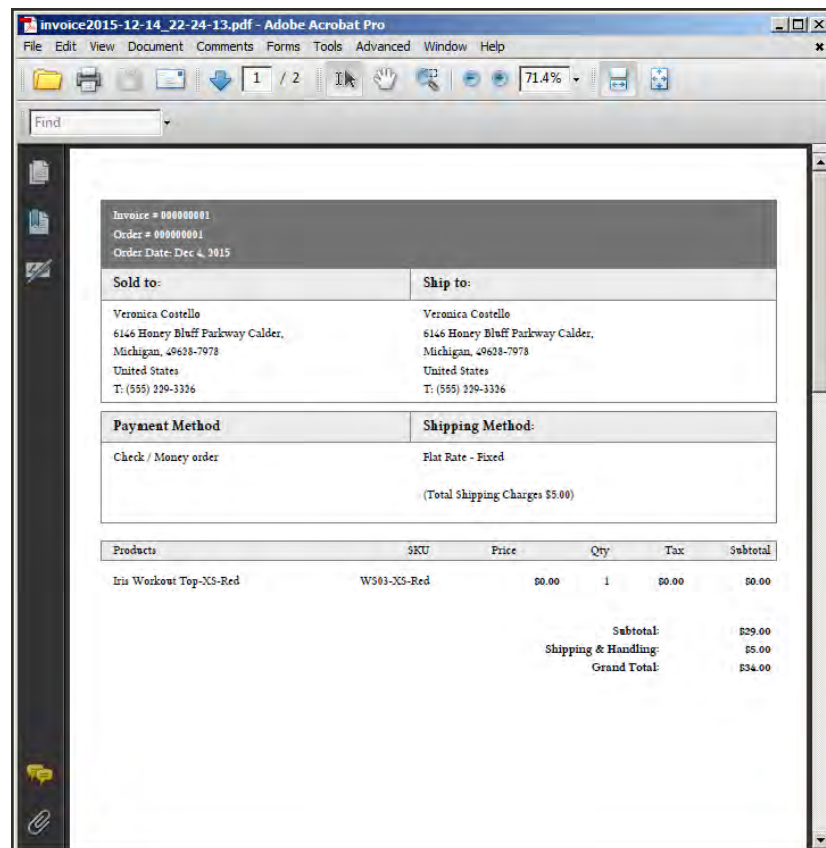
Grid Settings

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

CHAPTER 44:

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

Printing Multiple Invoices

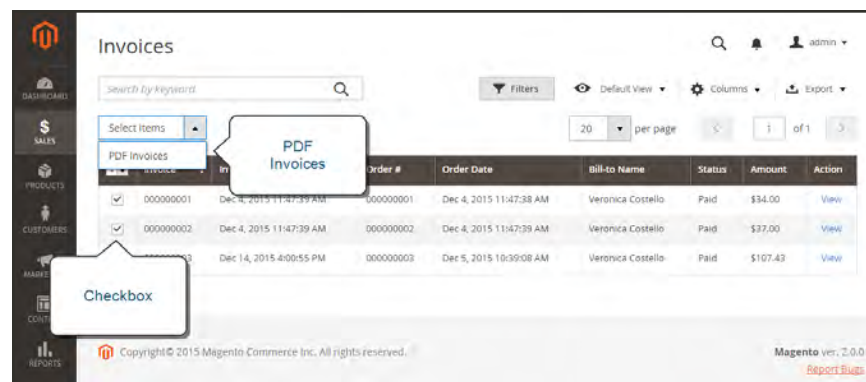
Invoices can be printed individually or as a batch. However, before an invoice can be printed, it must first be generated for the order. To add your logo and address to the invoice, see:

[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.”



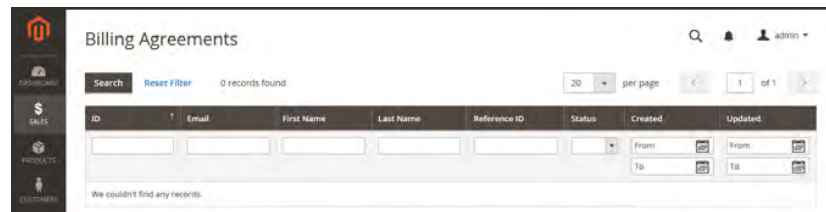
Print Invoices

The invoices are saved in a single PDF file that can be sent to a printer, or saved.

CHAPTER 45:

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.

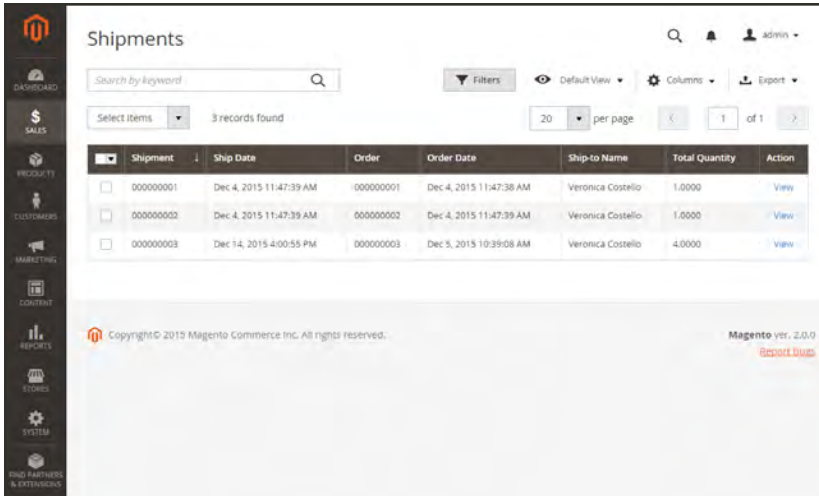


Billing Agreements

CHAPTER 46:

Shipments

The Shipments grid lists the shipment record of all invoices that have been prepared for shipping. A shipment record can be generated when an order is **invoiced**.



The screenshot shows the Magento Admin interface for the Shipments grid. It includes a search bar, filters, and a table with columns for Shipment, Ship Date, Order, Order Date, Ship-to Name, Total Quantity, and Action. The table contains three records for shipment ID 000000001, 000000002, and 000000003, all shipped to Veronica Costello.

Shipment	Ship Date	Order	Order Date	Ship-to Name	Total Quantity	Action
<input type="checkbox"/> 000000001	Dec 4, 2015 11:47:39 AM	000000001	Dec 4, 2015 11:47:38 AM	Veronica Costello	1.0000	View
<input type="checkbox"/> 000000002	Dec 4, 2015 11:47:39 AM	000000002	Dec 4, 2015 11:47:39 AM	Veronica Costello	1.0000	View
<input type="checkbox"/> 000000003	Dec 14, 2015 4:00:55 PM	000000003	Dec 5, 2015 10:39:08 AM	Veronica Costello	4.0000	View

Shipments

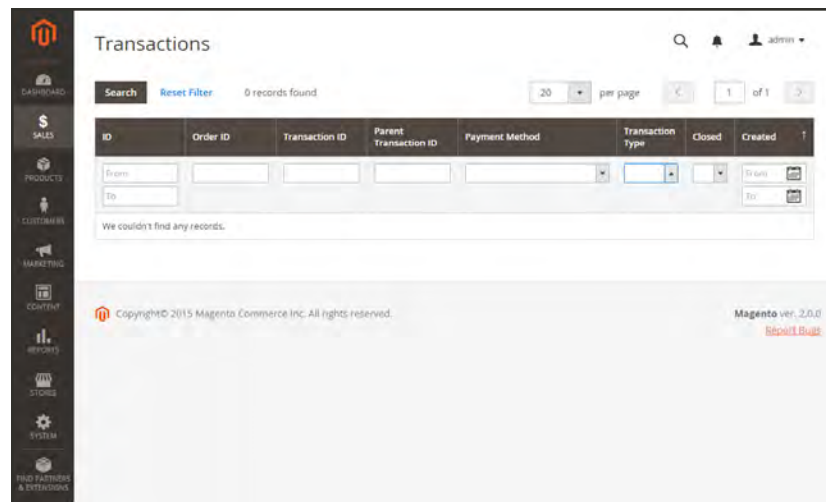
CHAPTER 47:

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:

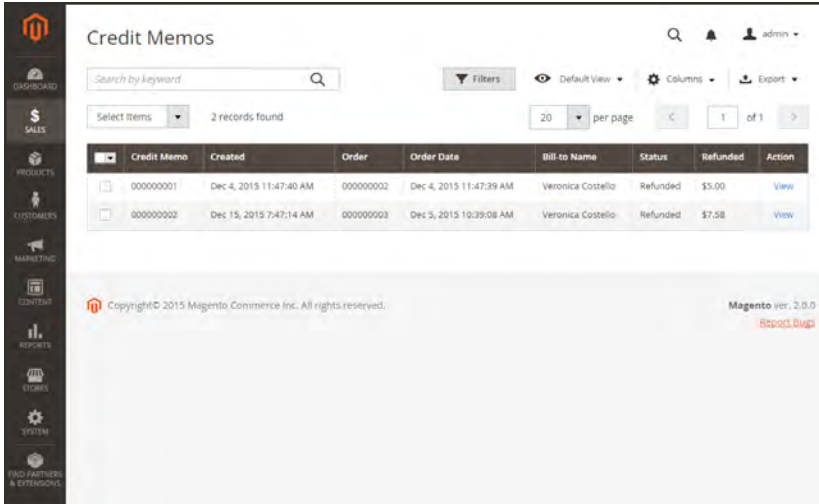
On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Transactions**.



Transactions

CHAPTER 48:**Credit Memos**

A credit memo is a document that shows the amount that is owed to the customer. The amount can be applied toward a purchase, or refunded to the customer. You can print a credit memo for a single order, or for multiple orders as a batch. Before a credit memo can be printed, it must first be generated for the order. The credit memo grid lists the credit memos that have been issued. to customers.

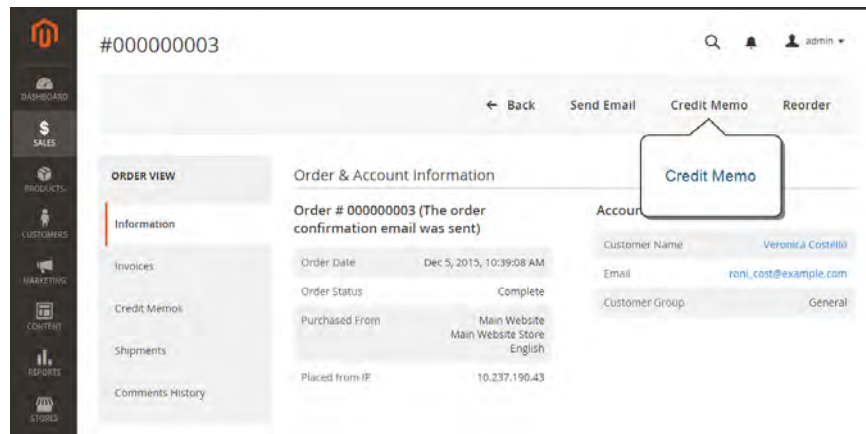


Credit Memo	Created	Order	Order Date	Bill to Name	Status	Refunded	Action
000000001	Dec 4, 2015 11:47:40 AM	000000002	Dec 4, 2015 11:47:39 AM	Veronica Costello	Refunded	\$5.00	View
000000002	Dec 15, 2015 7:47:14 AM	000000003	Dec 3, 2015 10:39:08 AM	Veronica Costello	Refunded	\$7.58	View

Credit Memos

To create a credit memo:

1. On the Admin sidebar tap **Sales**. Then under Operations, choose **Orders**.
2. Find the completed order in the grid. Then in the **Action** column, click the **View** link to open the order.
3. In the upper right corner, tap **Credit Memo**. (The button appears only after an order is invoiced.)



Create Credit Memo

The New Credit Memo page looks similar to the completed order page, with an Items to Refund section that lists each item from the invoice.

Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total
Overnight Duffel SKU: 24-WB07	\$45.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	0	\$45.00	\$3.71	\$0.00	\$48.71
Affirm Water Bottle SKU: 24-UG06	\$7.00	Ordered 1 Invoiced 1 Shipped 1	<input checked="" type="checkbox"/>	1	\$7.00	\$0.58	\$0.00	\$7.58
Harmony Lumaflex™ Strength Band Kit SKU: 24-UG03	\$22.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	0	\$22.00	\$1.82	\$0.00	\$23.82
Pursuit Lumaflex™ Tone Band SKU: 24-UG02	\$16.00	Ordered 1 Invoiced 1 Shipped 1	<input type="checkbox"/>	0	\$16.00	\$1.22	\$0.00	\$17.22

Items to Refund

If an online payment method was used, you will not be able to edit these fields.

4. Do one of the following:
 - If the product is to be returned to inventory, mark the **Return to Stock** checkbox.
 - If the product will not be returned to inventory, leave the checkbox blank.

The Return to Stock checkbox appears only if inventory Stock Options are set to “Decrease Stock When Order Is Placed.”

5. Complete the following:
 - a. In the **Qty to Refund** box, enter the number of items to be returned. Then, press the **Enter** key to record the change. The Update Qty’s button becomes active.
 - b. Enter **0** for the **Qty to Refund** of any items that are not to be refunded.
 - c. Tap **Update Qty’s** to recalculate the total. (The amount to be credited cannot exceed the maximum amount that is available for refund.)

6. In the **Refund Totals** section, do the following, as applicable:
 - a. In the **Refund Shipping** field, enter any amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.
 - b. In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (shipping, items, or tax). The amount entered cannot raise the total refund higher than the paid amount.
 - c. In the **Adjustment Fee** field, enter a value to be subtracted from the total amount refunded. This amount is not subtracted from a specific section of the order such as shipping, items, or tax.
 - d. If the purchase was paid with store credit, mark the **Refund to Store Credit** checkbox. The amount will be credited to the customer’s account balance.
 - e. To add a comment, enter the text in the **Credit Memo Comments** box.
 - f. To send an email notification to the customer, mark the **Email Copy of Credit Memo** checkbox.
 - g. To include the comments you have entered in the email, mark the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.

7. To complete the process and generate the credit memo, choose one of the following refund option buttons, according to the payment type:
 - Refund Offline
 - Refund Online

8. To add a comment to the completed credit memo, scroll down to the Comments History section, and enter the comment in the box. A history of all activity related to the order is listed below.

- To send the comment to the customer by email, mark the **Notify Customer by Email** checkbox.
- To post the comment in the customer's account, mark the **Visible on Frontend** checkbox.

Then, tap **Submit Comment** .

9. In the panel on the left, choose **Credit Memos**. Any credit memos that are associated with this order appear in the list.

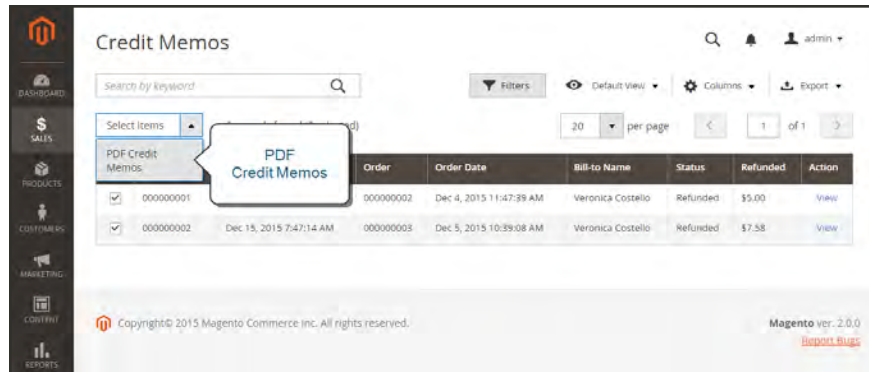
The screenshot displays the Magento Admin interface for order #000000003. The left sidebar shows the navigation menu with 'Credit Memos' selected. The main content area shows a table with one record:

<input type="checkbox"/>	Credit Memo	Created	Order	Order Date	Bill to Name	Status	Refunded	Action
<input type="checkbox"/>	000000002	Dec 15, 2015 7:47:14 AM	000000003	Dec 5, 2015 10:39:08 AM	Veronica Costello	Refunded	\$7.58	View

Completed Credit Memo

Printing Credit Memos

To print or view the completed credit memo, you must have a PDF reader installed on your computer. You can download [Adobe Reader](#) at no charge.



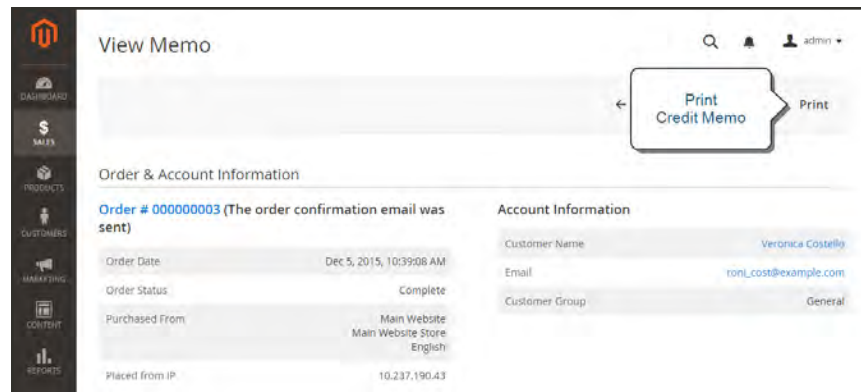
Credit Memos

To print a credit memo:

1. On the Admin sidebar, tap **Sales**. Then under **Operations**, choose **Credit Memos**.
2. Use one of the following methods to print the credit memo:

Method 1: Print current credit memo

1. In the grid, open the credit memo.
2. Tap **Print**.

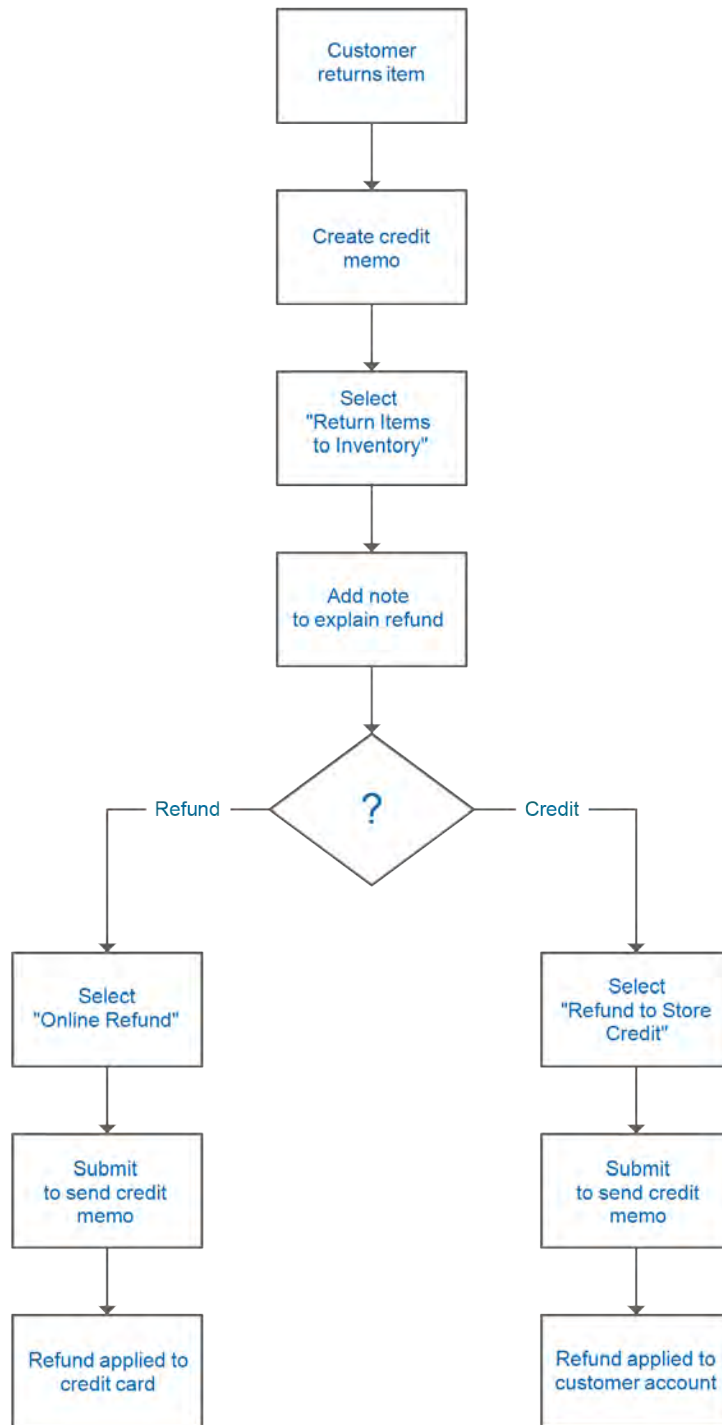


Print Credit Memo

Method 2: Print multiple credit memos

1. In the list, mark the checkbox of each credit memo that you want to print.
2. Set the **Actions** control to “PDF Credit Memos. Then, tap **Submit**.
3. When prompted, do one of the following:
 - To save the document, tap **Save**. Then, follow the prompts to save the file to your computer. When the download is complete, open the PDF in Adobe Reader, and print the document.
 - To view the document, tap **Open**. The printed-ready PDF credit memo opens in Adobe Reader. From here, you can either print the credit memo or save it to your computer.

Product Return Workflow



Product Return Workflow

Payments

Magento Community Edition 2.0 supports a variety of payment methods, services, and gateways that you can offer for your customers' convenience.

Contents

Basic Payment Methods

- Check / Money Order

- Cash On Delivery

- Bank Transfer

- Purchase Order

- Zero Subtotal Checkout

PayPal

- PayPal Business Account

- PayPal All-In-One Solutions

 - PayPal Payments Advanced

 - PayPal Payments Pro

 - PayPal Payments Standard

- PayPal Payment Gateways

 - PayPal Payflow Pro

 - PayPal Payflow Link

- PayPal Express Checkout

- PayPal Fraud Management Filter

- PayPal Payment Solutions

- PayPal Solutions by Country

Other Payment Solutions

- Testing Credentials

- Authorize.Net Direct Post

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. Additional online payment methods such **PayPal**, and credit card payments through payment **gateways** are covered later in the guide.

Check / Money Order

Magento Community Edition 2.0 allows you to accept payments by check or money order. The Check / Money Order payment method is enabled for your store by default. You can accept checks and money orders from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

Enabled	Yes	[WEBSITE]
Title	Check / Money order	[STORE VIEW]
New Order Status	Pending	[WEBSITE]
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]
Payment from Specific Countries	Afghanistan Åland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda	[WEBSITE]
Make Check Payable to		[STORE VIEW]
Send Check to		[STORE VIEW]
Minimum Order Total		[WEBSITE]
Maximum Order Total		[WEBSITE]
Sort Order		[WEBSITE]

Check / Money Order

To configure payment by check or money order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Check / Money Order** section. Then, do the following:
 - a. To accept payment by check or money order, set **Enabled** to “Yes.”
 - b. Enter a **Title** to identify the Check / Money Order payment method during checkout.
 - c. Set **New Order Status** to “Pending” until receipt of payment is confirmed.
 - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all 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 Community Edition 2.0 allows you to accept COD payments for purchases. You can accept COD payment from only specific countries, and fine-tune the configuration with minimum and maximum order total limits.

The shipping carrier receives payment from the customer at the time of delivery, which is then transferred to you. You can make an adjustment for any fee charged by the carrier service in your shipping and handling charges.

Cash On Delivery Payment

Enabled	No	[WEBSITE]
Title	Cash On Delivery	[STORE VIEW]
New Order Status	Pending	[WEBSITE]
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]
Payment from Specific Countries	Afghanistan Åland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda	[WEBSITE]
Instructions		[STORE VIEW]
Minimum Order Total		[WEBSITE]
Maximum Order Total		[WEBSITE]
Sort Order		[WEBSITE]

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 **Instructions** for making a COD payment.
 - f. Set **Minimum Order Total** and **Maximum Order Total** to the order amounts that are required to qualify for COD payment.

An order qualifies if the total is between, or matches, the minimum or maximum order total.
 - g. Enter a **Sort Order** number to determine the sequence in which Cash On Delivery is listed with other payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **Save Config**.

Bank Transfer

Magento Community Edition 2.0 allows you to accept payment that is transferred from a customer's bank account and deposited into your merchant bank account.

The screenshot shows the configuration interface for the 'Bank Transfer Payment' method. The page title is 'Bank Transfer Payment' with a close button in the top right corner. The configuration is organized into several sections:

- Enabled:** A dropdown menu set to 'No' with a '[WEBSITE]' label.
- Title:** A text input field containing 'Bank Transfer Payment' with a '[STORE VIEW]' label.
- New Order Status:** A dropdown menu set to 'Pending' with a '[WEBSITE]' label.
- Payment from Applicable Countries:** A dropdown menu set to 'All Allowed Countries' with a '[WEBSITE]' label.
- Payment from Specific Countries:** A multi-select dropdown menu showing a list of countries including Afghanistan, Alderney Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. It has a '[WEBSITE]' label.
- Instructions:** A large text area for providing payment instructions, with a '[STORE VIEW]' label.
- Minimum Order Total:** A text input field with a '[WEBSITE]' label.
- Maximum Order Total:** A text input field with a '[WEBSITE]' label.
- Sort Order:** A text input field with a '[WEBSITE]' label.

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 ⊙

Enabled	<input type="text" value="No"/>	[WEBSITE]
Title	<input type="text" value="Purchase Order"/>	[STORE VIEW]
New Order Status	<input type="text" value="Pending"/>	[WEBSITE]
Payment from Applicable Countries	<input type="text" value="All Allowed Countries"/>	[WEBSITE]
Payment from Specific Countries	<input type="text" value="Afghanistan, Åland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, Antigua and Barbuda"/>	[WEBSITE]
Minimum Order Total	<input type="text"/>	[WEBSITE]
Maximum Order Total	<input type="text"/>	[WEBSITE]
Sort Order	<input type="text"/>	[WEBSITE]

Purchase Order

To configure payment by purchase order:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Payment Methods**.
3. Expand ☺ the **Purchase Order** section. Then, do the following:
 - a. To activate this payment method, set **Enabled** to “Yes.”
 - b. Enter a **Title** to identify this payment method during checkout.
 - c. Set **New Order Status** to “Pending” until payment is authorized.
 - d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all 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.

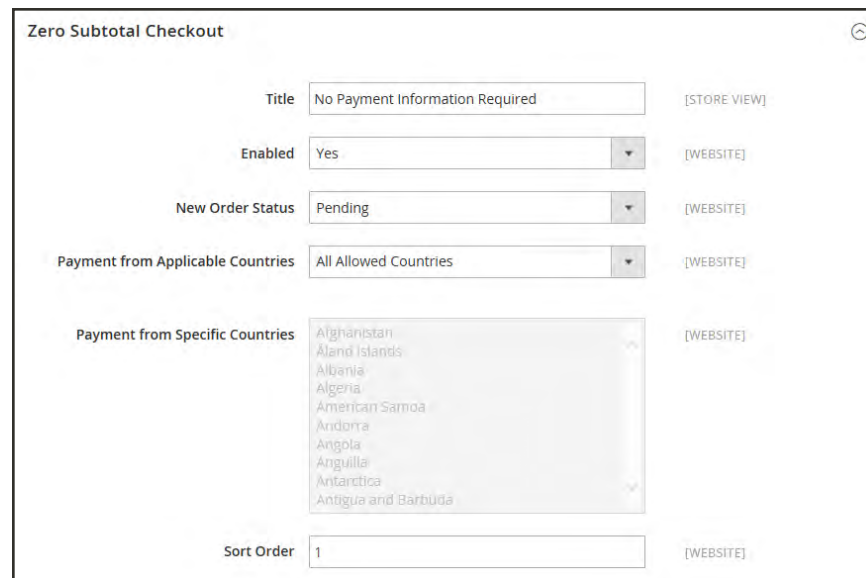
An order qualifies if the total falls between, or exactly matches, the minimum or maximum total values.
 - f. Enter a **Sort Order** number to determine the position of Purchase Order in the list of payment methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
4. When complete, tap **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.



The screenshot shows the configuration form for the Zero Subtotal Checkout payment method. The form is titled "Zero Subtotal Checkout" and includes the following fields:

- Title:** No Payment Information Required [STORE VIEW]
- Enabled:** Yes [WEBSITE]
- New Order Status:** Pending [WEBSITE]
- Payment from Applicable Countries:** All Allowed Countries [WEBSITE]
- Payment from Specific Countries:** A list of countries including Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda [WEBSITE]
- Sort Order:** 1 [WEBSITE]

Zero Subtotal Checkout

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, select **Payment Methods**.
3. Click to expand the **Zero Subtotal Checkout** section. Then, do the following:
 - a. Enter a **Title** to identify the Zero Subtotal method during checkout.
 - b. Set **Enabled** to “Yes” to activate Zero Subtotal Checkout.
 - c. If orders typically wait for authorization, set **New Order Status** to “Pending” until payment is authorized.

Pending	The order is waiting for authorization.
Processing	Payment has been authorized, and the transaction is being processed.
 - d. Set **Automatically Invoice All Items** to “Yes” if you want to automatically invoice all items that have a zero balance.
 - e. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all 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 50:

PayPal

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Community Edition 2.0, you can accept payments from all major debit and credit cards, and PayPal account holders. Since customers don't even need a PayPal account to pay with PayPal, both you and your customers can get extra convenience without extra effort.

The selection of available PayPal solutions varies by merchant location. To learn more, see: [PayPal Payment Solutions](#). PayPal Express Checkout and PayPal Payments Standard can be used in all parts of the world.

You cannot have more than one PayPal method enabled at a time, with the exception of PayPal Express Checkout. PayPal Express Checkout can be used in combination with other PayPal payment methods, except PayPal Payments Standard. PayPal Payments Standard cannot be enabled simultaneously with any other method, including PayPal Express Checkout.

PayPal Business Account

To offer PayPal as a payment method in your store, you must have a PayPal **business account** and/or a PayPal Payflow account. The account requirements are specified in the description of each PayPal solution. Your PayPal merchant account is also used to manage any **fraud filters** that are applied to purchases made from your store.

Customers who use PayPal Express Checkout or Express Checkout for Payflow Pro must have a PayPal buyer account. PayPal Payments Standard (which in some countries is called Website Payments Standard) can be used directly or through a buyer account, provided that the merchant enables PayPal Account Optional. By default, this parameter is enabled. Customers can choose to enter their credit card information, or create a buyer account with PayPal. When disabled, customers must first create a PayPal buyer account before making a purchase.

Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require customers to enter credit card information during checkout.

PayPal All-In-One Payment Solutions

In the United States, PayPal offers the following PCI-compliant solutions to meet the needs of your growing business.

- [PayPal Payments Advanced](#)
- [PayPal Payments Pro](#)
- [PayPal Payments Standard](#)

For the solutions available in other countries, see: [PayPal Solutions by Country](#).

PayPal All-in-One Payment Solutions
Accept and process credit cards and PayPal payments.

Choose a secure bundled payment solution for your business. [Help](#)

PayPal Payments Advanced (Includes Express Checkout)
Accept payments with a PCI-compliant checkout that keeps customers on your site.

[Configure](#) [Learn More](#)

PayPal Payments Pro (Includes Express Checkout)
Connect your merchant account with a fully customizable gateway that lets customers pay without leaving your site.

[Configure](#) [Learn More](#)

PayPal Payments Standard
Accept credit card and PayPal payments securely.

[Configure](#) [Learn More](#)

SECURE PAYMENTS BY **PayPal**
VISA DISCOVER AMEX

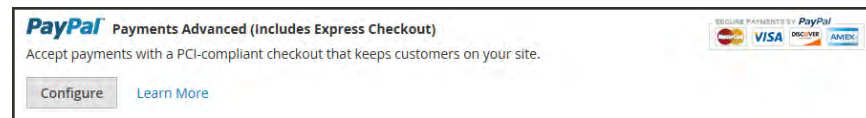
Payflow
from PayPal

Check out with **PayPal**

PayPal All-In-Payment Solutions

PayPal Payments Advanced

PayPal Payments Advanced is a **PCI-compliant** solution that lets your customers pay by debit or credit card without leaving your site. It includes an embedded checkout page that can be customized to create a seamless and secure checkout experience.



PayPal Payments Advanced

Even customers without a PayPal account can make purchases through PayPal's secure payment gateway. Accepted cards include Visa, MasterCard, Switch/Maestro, and Solo credit cards in the United States and United Kingdom. For additional convenience, PayPal Express Checkout is included with PayPal Payments Advanced.

You can have two PayPal solutions active at the same time: Express Checkout, plus any All-In-One or Payment Gateway solution. If you change payment solutions, the one that was used previously is disabled.

PayPal Payments Advanced cannot be used for orders created from the Admin of your store.

Checkout Workflow

1

Customer Chooses Payment Method. During checkout, the customer chooses to pay with PayPal Payments Advanced. The Pay Now button appears instead of the Place Order button.

2

Pay Now. The customer taps Pay Now, and a PayPal-hosted form appears. The customer enters the card information, and the card is verified. If successful, the order confirmation page appears.

Pay with PayPal. The form also includes the Pay with PayPal button, which redirects the customer to the PayPal site, where payment can be made with PayPal Express Checkout.

3

Troubleshooting. If the transaction fails for any reason, an error message appears on the checkout page and the customer is instructed to try again. Any issues are managed by PayPal.

Order Processing Workflow

Processing orders with PayPal Payments Advanced is the same as for any regular PayPal order.

Orders are invoiced and shipped, and credit memos generated for both online and offline refunds. However, multiple online refunds are not available for orders paid with PayPal Payments Advanced.

1

Customer Places Order. In the final stage of checkout, the customer taps the Place Order button.

2

PayPal Responds. PayPal evaluates the request. If found to be valid, PayPal processes the transaction.

3

Magento Sets Order Status. Magento receives response from PayPal, and sets the order status to one of the following:

Processing. The transaction was successful.

Pending Payment. The system did not receive any response from PayPal.

Canceled. The transaction was not successful for some reason.

Suspected Fraud. The transaction did not pass some of the [PayPal fraud filters](#); the system receives the response from PayPal that the transaction is reviewed by PayPal Fraud Service.

4

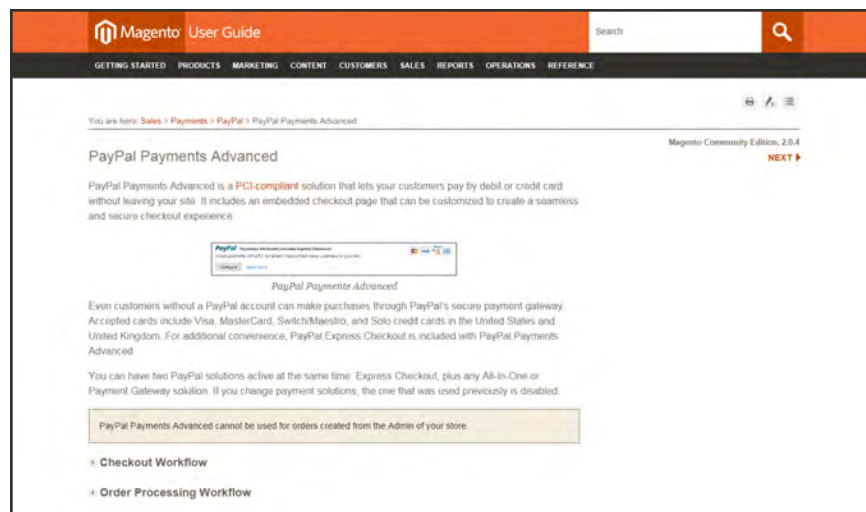
Merchant Fulfills Order. The merchant invoices and ships the order.

Requirements

- ✔ **PayPal Business Account**
- ✔ If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Setting Up PayPal Payments Advanced

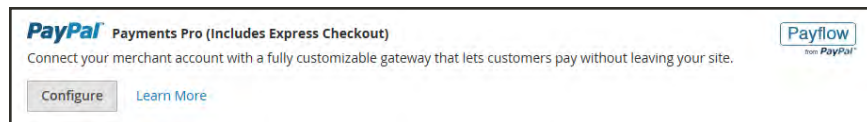
For step-by-step configuration instructions, see [PayPal Payments Advanced](#) in the Magento Community Edition 2.0 online user guide.



Setting Up PayPal Payments Advanced

PayPal Payments Pro

PayPal Payments Pro brings you all the benefits of a merchant account and payment gateway in one, plus the ability to create your own, fully customized checkout experience. PayPal Express Checkout is automatically enabled with PayPal Payments Pro, so you can tap into more than 110 million active PayPal users.



PayPal Payments Pro

For merchants outside the US, this method is called “PayPal Website Payments Pro.”

You can have two PayPal solutions active at the same time: PayPal Express Checkout, plus any one of the All-In-One solutions. If you change payment solutions, the one used previously is automatically disabled.

Checkout Workflow

- 1 Customer Goes to Checkout.** Customer adds products to cart, and taps Proceed to Checkout.
- 2 Customer Chooses Payment Method.** During checkout, customer chooses the PayPal Direct Payment option, and enters the credit card information.
 - If paying with PayPal Payments Pro, the customer stays on your site during the checkout process.
 - If paying with PayPal Express Checkout, the customer is redirected to the PayPal site to complete the transaction.

At the customer’s request, the store administrator can also create an order from the Admin, and process the transaction with PayPal Payments Pro.

Order Processing Workflow

1

Order Placed. The order can be processed either the Admin of your store, or from your PayPal merchant account.

2

Payment Action. The payment action specified in the configuration is applied to the order. Options include:

Authorize. Magento creates a sales order with the “Processing” status. In this case, the amount of money to be authorized is pending approval.

Sale. Magento creates both a sales order and invoice.

Capture. PayPal transfers the order amount from the buyer’s balance, bank account or credit card to the merchant’s account.

3

Invoicing. An invoice is created in Magento after PayPal sends an instant payment notification message to Magento.

Make sure that instant payment notifications are enabled in your PayPal merchant account.

If required, an order can be partially invoiced for a specified quantity of products. For each partial invoice submitted, a separate Capture transaction with a unique ID becomes available, and a separate invoice is generated.

Authorization-only payment transactions are closed only after the full order amount is captured.

An order can be voided online at any time until the order amount is fully invoiced.

4

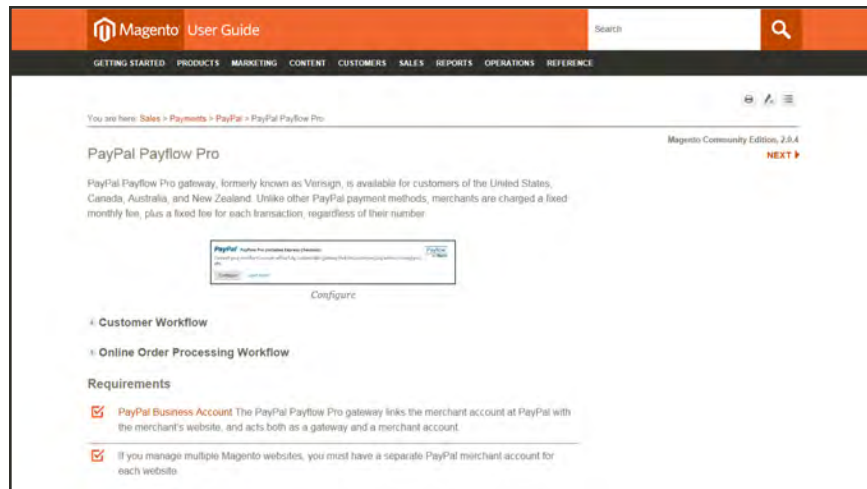
Returns. If for any reason the customer returns the purchased products and claims a refund, as with order amount capturing and invoice creation, you can create an online refund either from the Admin or from your PayPal merchant account.

Requirements

- PayPal Merchant Account** (with Direct Payments Activated)

Setting Up PayPal Payments Pro

For step-by-step configuration instructions, see **PayPal Payments Pro** in the Magento Community Edition 2.0 online user guide.



Setting Up PayPal Payment Pro

PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment both by credit card and PayPal by simply adding a checkout button to your store.



PayPal Payments Standard

For merchants outside the US, this method is called “PayPal Website Payments Standard.”

With PayPal Payments Standard, you can swipe credit cards on mobile devices. There is no monthly fee, and you can get paid on eBay. Supported credit cards include Visa, MasterCard, Discover, and American Express. In addition, customers can pay directly from their personal PayPal accounts. PayPal Payments Standard is available in all countries on the PayPal worldwide reference list.

Checkout Workflow

For customers, PayPal Payments Standard is a one-step process if the credit card information and their personal PayPal accounts is up to date.

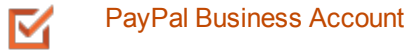
1

Customer Places Order. The customer taps the “Pay Now” button to complete the purchase.

2

PayPal Processes the Transaction. The customer is redirected to the PayPal site to complete the transaction.

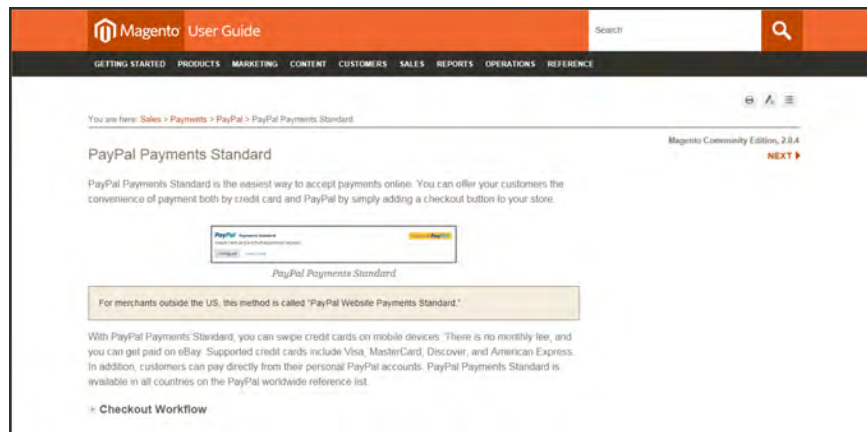
Merchant Requirements



Setting Up PayPal Payments Standard

PayPal Payments Standard cannot be used simultaneously with any other PayPal method, including Express Checkout. If you change payment solutions, the one used previously is disabled.

For step-by-step configuration instructions, see [PayPal Payments Standard](#) in the online user guide.

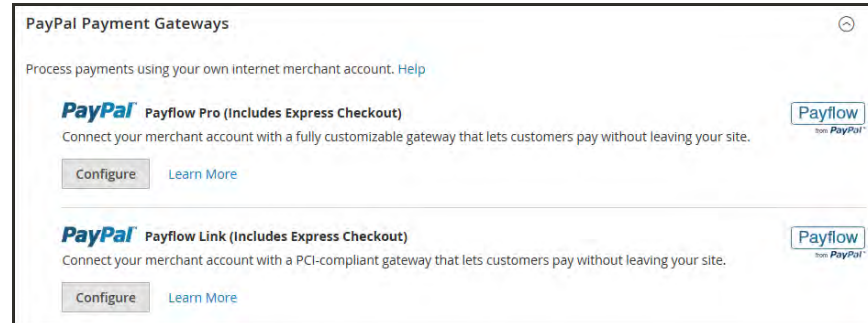


Setting Up PayPal Payments Standard

PayPal Payment Gateways

PayPal offers a choice of two payment gateway solutions for your business. You can 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 Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is available for customers of the United States, Canada, Australia, and New Zealand. Unlike other PayPal payment methods, merchants are charged a fixed monthly fee, plus a fixed fee for each transaction, regardless of their number.



Configure

Customer Workflow

- 1 Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow Pro, and enters the credit card information.

Customers are not required to have personal PayPal accounts. However, depending on the merchant country, customers can also use their personal PayPal account to pay for the order.
- 2 Customer Submits Order.** The customer submits the order, and the order information is sent to PayPal for processing. The customer does not leave the checkout page of your site.
- 3 PayPal Completes the Transaction.** Payments are accepted at the time the order is placed. Depending on the payment action specified in the configuration, either a sales order or a sales order and an invoice is created.

Online Order Processing Workflow

- 1 Admin Submits Online Invoice.** The store administrator submits an online invoice, and as a result a corresponding transaction and an invoice is created.
- 2 PayPal Receives the Transaction.** The order information is sent to PayPal. A record of the transaction and an invoice is generated. You can view all Payflow Pro Gateway transactions in your [PayPal merchant account](#).

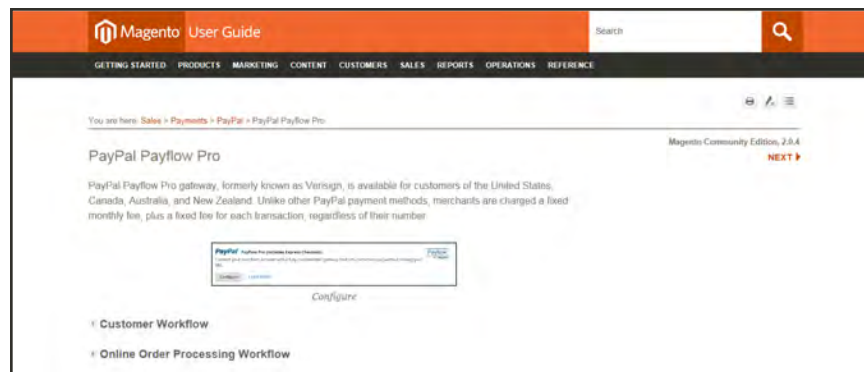
Partial invoices and partial refunds are not supported by PayPal Payflow Pro.

Requirements

- ✔ **PayPal Business Account** The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.
- ✔ If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Setting Up PayPal Payflow Pro

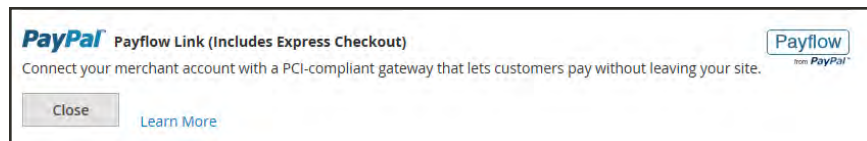
For step-by-step configuration instructions, see [PayPal Payflow Pro](#) in the Magento Community Edition 2.0 online user guide.



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.

Customer Workflow

- 1 Customer Goes to Checkout.** During checkout, the customer chooses to pay with PayPal PayFlow link, and enters the credit card information.
The customer is not required to have a personal PayPal account.
- 2 Customer Chooses Pay Now.** The customer taps the Pay Now button to submit the order.
- 3 Customer Enters Credit Card Info.** The customer enters the credit card information on a form that is hosted by PayPal/
If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to “Canceled.”
- 4 Customer Submits the Order.** The credit card information is submitted directly to PayPal, and is not retained anywhere on the Magento site.

Order Workflow

1

PayPal Receives Request. PayPal receives the request from the customer to Pay Now.

2

PayPal Verifies the Payment Information. PayPal verifies the credit card information, and assigns the appropriate status. If verified, the “Pending Payment” status is initially assigned to the order, until the transaction is settled. Options:

Processing. The transaction was successful.

Pending Payment. The system did not receive any response from PayPal.

Canceled. The transaction was not successful for some reason.

Suspected Fraud. The transaction did not pass some of the [PayPal fraud filters](#). The system receives the response from PayPal that the transaction is under review by Fraud Service.

If the customer clicks the Cancel Payment link, the customer returns to the Payment Information stage of checkout, and the order status changes to “Canceled.”

3

Customer Is Redirected to Confirmation Page. If the transaction completes successfully, the customer is redirected to the order confirmation page in your store.

If the transaction fails on any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These situations are managed by PayPal.

4

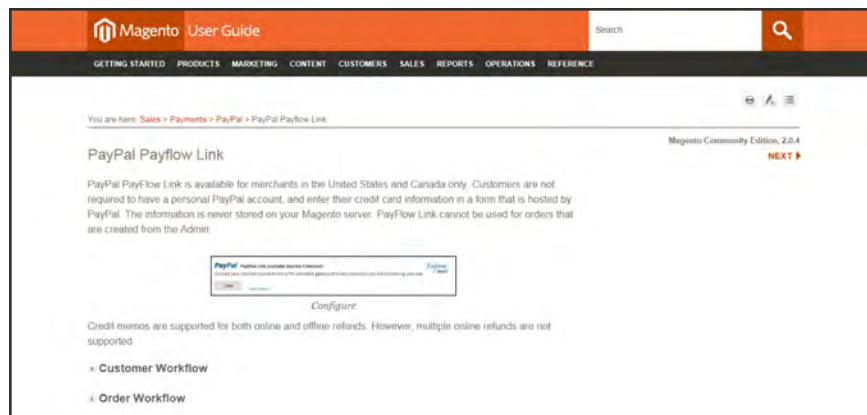
Merchant Fulfills Order. The merchant invoices, and ships the order as usual.

Requirements

- ✔ **PayPal Business Account** The PayPal Payflow Pro gateway links the merchant account at PayPal with the merchant's website, and acts both as a gateway and a merchant account.
- ✔ If you manage multiple Magento websites, you must have a separate PayPal merchant account for each website.

Setting Up PayPal Payflow Link

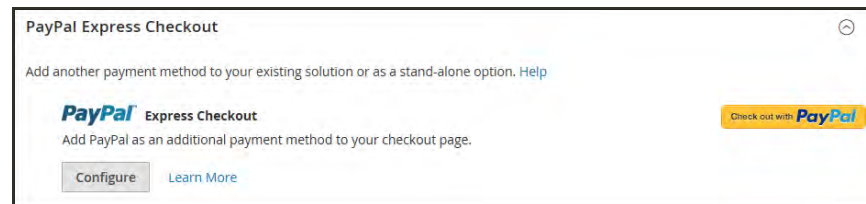
For step-by-step configuration instructions, see [PayPal Payflow Link](#) in the Magento Community Edition 2.0 online user guide.



PayPal Payflow Link Setup

PayPal Express Checkout

PayPal Express Checkout helps boost sales by giving your customers the ability to pay by credit card or from the security of their personal PayPal accounts. During checkout, the customer is redirected to the secure PayPal site to complete the payment information. The customer is then returned to your store to complete the remainder of the checkout process. Choosing Express Checkout adds the familiar PayPal button to your store, which has been reported to increase sales.*



Customers with current PayPal accounts can make a purchase in a single step by clicking the “Check out with PayPal” button. Express Checkout can be used as a standalone, or in combination with one of PayPal’s All-In-One solutions. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal.

Checkout Workflow

Unlike other payment methods, PayPal Express Checkout allows the customer to check out at the beginning of the usual checkout workflow from the product page, the mini shopping cart, and shopping cart.

1

Customer Places Order. The customer taps the “Check out with PayPal” button. .

2

Customer Is Redirected to PayPal Site. The customer is redirected to the PayPal site to complete the transaction. / The customer taps the “Check out with PayPal” button. and is redirected to the PayPal site to complete the transaction.

3

Customer Logs into their PayPal Account. The customer must log in to their PayPal account to complete the transaction. The payment system uses the customer’s billing and shipping information from their PayPal account.

4

Customer Returns to the Checkout Page. The customer is redirected back to the checkout page in your store to review the order.

5

Customer Places Order. The customer places the order, and the order information is submitted to PayPal.

6

PayPal Settles the Transaction. PayPal receives the order and settles the transaction.

PayPal Express Checkout does not support orders with multiple-addresses.

Requirements



Merchant: [Personal PayPal Account](#)



Customer: [Personal PayPal Account](#)

Setting Up PayPal Express Checkout

You can have two PayPal solutions active at the same time: Express Checkout, plus an All-In-One solution. If you enable a different solution, the one used previously is automatically deactivated.

Process Overview:

Step 1: [Configure Your PayPal Account](#)


Step 2: [Complete the Required Settings](#)

Step 3: [Complete the Basic Settings](#)

Step 4: [Complete the Advanced Settings](#)

Step 1: Configure Your PayPal Account

1. Before you begin, you must configure your PayPal merchant account on the PayPal website.
 - a. Log in to your PayPal Advanced account at manager.paypal.com.
 - b. Go to **Service Settings > Hosted Checkout Pages > Set Up**, and make the following settings:

AVS	No
CSC	No
Enable Secure Token	Yes
 - c. **Save** the settings.
2. PayPal recommends that you set up an additional user on your account. To set up an additional user, do the following:
 - a. Go to manager.paypal.com and log in to your account.
 - b. Follow the instructions to set up an additional user.
 - c. **Save** the changes.
3. Expand  the **Required PayPal Settings** section, and do the following:
 - a. Enter the **Email Address** that is associated with your PayPal merchant account.

Important! Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

- b. Set **API Authentication Methods** to one of the following:
 - API Signature
 - API Certificate
- c. If necessary, click the **Get Credentials from PayPal** button. Then, complete the following:
 - API Username
 - API Password
 - API Signature
- d. If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”
If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.
- e. If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then,, complete the following:

- Proxy Host
 - Proxy Port
4. When these sections are complete, set **Enable this Solution** to “Yes.”
 5. To offer financing through PayPal to your customers, see PayPal Credit to learn more.

You have now completed the Required PayPal Settings. At this point, you can either continue with the Basic and Advanced Settings, or click the **Save Config** button. You can return later fine-tune the configuration.

Step 2: Begin the Configuration

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Payment Methods**.
3. If your Magento installation has multiple websites, stores or views, in the upper-left corner, choose the **Store View** where the configuration applies.
4. In the **Merchant Location** section, select the **Merchant Country** where your business is located.
5. Expand ☺ the **PayPal Express Checkout** section. Then, tap **Configure**.

Step 3: Complete the Required Settings

- a. Enter the **Email Address** that is associated with your PayPal merchant account.

Important! Email addresses are case sensitive. To receive payment, the email address you enter must match the email address specified in your PayPal merchant account.

- b. Set **API Authentication Methods** to one of the following:
 - API Signature
 - API Certificate
- c. If necessary, tap **Get Credentials from PayPal**. Then, complete the following:
 - API Username
 - API Password
 - API Signature
- d. If you are using credentials from your sandbox account, set **Sandbox Mode** to “Yes.”
If necessary, click the **Sandbox Credentials** button and follow the instructions to set up your testing environment.
- e. If your system uses a proxy server to establish the connection between Magento and the PayPal payment system, set **API Uses Proxy** to “Yes.” Then,, complete the following:

- Proxy Host
 - Proxy Port
6. Set **Enable This Solution** to “Yes.”
 7. If you want to offer PayPal Credit to your customers, set **Enable PayPal Credit** to “Yes.”

You have now completed the required settings. You can either continue with the remaining settings, or save and return later fine-tune the configuration.

Required Settings

Step 4: Complete the Basic Settings

1. Expand ☺ the **Basic Settings - PayPal Express Checkout** section.
2. Enter a **Title** to identify this payment method during checkout. It is recommended to set the title to “PayPal” for each store view.
3. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which PayPal Payments Standard is listed with the other methods. Payment methods appear in ascending order based on the Sort Order value.
4. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.
Order	The amount of the order is neither captured nor authorized in the customer’s balance, bank account, or credit card at PayPal. The Order payment action represents an agreement between the PayPal payment system and the merchant, which enables the merchant to capture one or more amounts up to the “ordered” total from the customer’s buyer account, over a period of up to 29 days. After the funds are “ordered,” the merchant can capture them at any time during the following 29 day period. Capturing of the order amount can be done only from the Magento Admin by creating one or more invoices.

5. To display the “Check out with PayPal” button on the product page, set **Display on Product Details Page** to “Yes.”
6. If **Payment Action** is set to “Order,” complete the following fields:

Authorization Honor Period (days)	Determines how long the primary authorization remains valid. The value should be equal to the corresponding value in your PayPal merchant account. The default value in your PayPal merchant account is 3. To increase this number you need to contact PayPal. The authorization becomes invalid at 11:49 p.m., U.S. Pacific Time, of the last day.
Order Valid Period (days)	Determines how long the order remains valid. When the order becomes invalid, you can no longer create invoices for it. Specify the value equal to the Order Valid Period value in your PayPal merchant account. The default value in your PayPal merchant account is 29. To change this number, you must contact PayPal.
Number of Child Authorizations	Specifies the maximum number of authorizations for a single order, which determines the maximum number of online partial invoices that you can create for an order. The number in this field should be equal to the corresponding setting in your PayPal merchant account. The default number of child authorizations in your PayPal account is 1. To increase this number, you must contact PayPal.

Basic Settings - PayPal Express Checkout

Title: [STORE VIEW]
It is recommended to set this value to "Magento_Paypal" per store views.

Sort Order: [STORE VIEW]

Payment Action: [WEBSITE]

Display on Product Details Page: [STORE VIEW]

Basic Settings

Step 5: Complete the Advanced Settings

1. Expand  the **Advanced Settings** section. Then, complete the following:

- a. Set **Display on Shopping Cart** to “Yes.”
- b. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.

- c. Set **Debug Mode** to “Yes” to write communications with the payment system into the log file. The log file for PayPal Payments Advanced is `payments_payflow_advanced.log`.

In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

- d. To enable host authenticity verification, set **Enable SSL Verification** to “Yes.”
- e. To display a full summary of the customer’s order by line item from the PayPal site, set **Transfer Cart Line Items** to “Yes.”

To include up to ten shipping options in the summary, set **Transfer Shipping Options** to “Yes.” (This option appears only if line items are set to transfer.)

- f. To determine the type of image used for the PayPal acceptance button, set **Shortcut Buttons Flavor** to one of the following:

Dynamic	(Recommended) Displays an image that can be dynamically changed from the PayPal server.
Static	Displays a specific image that cannot be dynamically changed.

- g.** To allow customers without PayPal accounts to make a purchases with this method, set **Enable PayPal Guest Checkout** to “Yes.”
- h.** Set **Require Customer’s Billing Address** to one of the following:

Yes	Requires the customer’s billing address for all purchases.
No	Does not require the customer’s billing address for any purchases.
For Virtual Quotes Only	Requires the customer’s billing address for virtual quotes only.
- i.** To specify whether the customer can sign a **billing agreement** with your store in the PayPal payment system when there are no active billing agreements available in the customer account, set **Billing Agreement Signup** to one of the following:

Auto	The customer can either sign a billing agreement during the Express Checkout flow or use another method of payment.
Ask Customer	The customer can decide whether to sign a billing agreement during the Express Checkout flow.
Never	The customer cannot sign a billing agreement during the Express Checkout flow.

Merchants must ask PayPal Merchant Technical Support to enable billing agreements in their accounts. The Billing Agreement Signup parameter is enabled only after PayPal confirms that billing agreements are enabled for your merchant account.

- j.** To allow the customer to complete the transaction from the PayPal site without returning to your Magento store for Order Review, set **Skip Order Review Step** to “Yes.”

Advanced Settings

Display on Shopping Cart	Yes (PayPal recommends this option)	[STORE VIEW]
Also affects mini-shopping cart.		
Payment Applicable From	All Allowed Countries	[WEBSITE]
Debug Mode	No	[WEBSITE]
Enable SSL verification	Yes	[WEBSITE]
Transfer Cart Line Items	Yes	[WEBSITE]
Transfer Shipping Options	No	[WEBSITE]
Notice that PayPal can handle up to 10 shipping options. That is why Magento will transfer only first 10 cheapest shipping options if there are more than 10 available.		
Shortcut Buttons Flavor	Dynamic	[STORE VIEW]
Enable PayPal Guest Checkout	No	[WEBSITE]
Ability for buyer to purchase without PayPal account.		
Require Customer's Billing Address	No	[WEBSITE]
This feature needs to be enabled first for the merchant account through PayPal technical support.		
Billing Agreement Signup	Never	[WEBSITE]
Whether to create a billing agreement, if there are no active billing agreements available.		
Skip Order Review Step	Yes	[WEBSITE]

Advanced Settings

2. Complete the following sections as needed for your store:

PayPal Billing Agreement Settings

A **billing agreement** is a sales agreement between the merchant and customer that has been authorized by PayPal for use with multiple orders. During the checkout process, the Billing Agreement payment option appears only for customers who have already entered into a billing agreement with your company. After PayPal authorizes the agreement, the payment system issues a unique reference ID to identify each order that is associated with the agreement. Similar to a purchase order, there is no limit to the number of billing agreements a customer can set up with your company.

1. Expand ☺ the **PayPal Billing Agreement Settings** section.
2. Set **Enabled** to “Yes.” Then, do the following:
 - a. Enter a **Title** to identify the PayPal Billing Agreement method during checkout.
 - b. If you offer multiple payment methods, enter a number in the **Sort Order** field to determine the sequence in which Billing Agreement appears when listed with other payment methods during checkout.

- c. Set **Payment Action** to one of the following:

Authorization	Approves the purchase, but puts a hold on the funds. The amount is not withdrawn until it is “captured” by the merchant.
Sale	The amount of the purchase is authorized and immediately withdrawn from the customer’s account.

- d. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.

- e. To record communications with the payment system in the log file, set **Debug Mode** to “Yes.”

The log file is stored on the server and is accessible only to developers. In accordance with PCI Data Security Standards, credit card information is not recorded in the log file.

- f. To enable SSL verification, set **Enable SSL verification** to “Yes.”
- g. To display a summary of each line item in the customer’s order on your PayPal payments page, set **Transfer Cart Line Items** to “Yes.”
- h. To allow customers to initiate a billing agreement from the dashboard of their customer account, set **Allow in Billing Agreement Wizard** to “Yes.”

PayPal Billing Agreement Settings		
Enabled	Yes	[WEBSITE]
Will appear as a payment option only for customers who have at least one active billing agreement.		
Title	PayPal Billing Agreement	[STORE VIEW]
Sort Order		[STORE VIEW]
Payment Action	Authorization	[WEBSITE]
Payment Applicable From	All Allowed Countries	[WEBSITE]
Debug Mode	No	[WEBSITE]
Enable SSL verification	Yes	[WEBSITE]
Transfer Cart Line Items	No	[WEBSITE]
Allow in Billing Agreement Wizard	Yes	[WEBSITE]

Billing Agreement Settings

Settlement Report Settings

1. Click to expand the **Settlement Report Settings** section.
2. If you have signed up for PayPal's Secure FTP Server, enter the following SFTP login credentials:
 - Login
 - Password
3. To run test reports before "going live" with Express Checkout on your site, set **Sandbox Mode** to "Yes."
4. Enter the **Custom Endpoint Hostname or IP Address**. By default, the value is: reports.paypal.com
5. Enter the **Custom Path** where reports are saved. By default, the value is: /ppreports/outgoing
6. To generate reports according to a schedule, under Scheduled Fetching, make the following settings:
 - a. Set **Enable Automatic Fetching** to "Yes."
 - b. Set **Schedule** to one of the following:
 - Daily
 - Every 3 Days
 - Every 7 Days

- Every 10 Days
- Every 14 Days
- Every 30 Days
- Every 40 Days

PayPal retains each report for forty-five days.

- Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.

Settlement Report Settings

Frontend Experience Settings

The frontend experience settings give you the opportunity to choose which PayPal logos appear on your site, and to customize the appearance of your PayPal merchant pages.

- Click to expand the **Frontend Experience Settings** section.
- Select the **PayPal Product Logo** that you want to appear in the PayPal block in your store. The PayPal logos are available in four styles and two sizes. Options include:
 - No Logo
 - We Prefer PayPal (150 x 60 or 150 x 40)

- Now Accepting PayPal (150 x 60 or 150 x 40)
 - Payments by PayPal (150 x 60 or 150 x 40)
 - Shop Now Using PayPal (150 x 60 or 150 x 40)
3. To customize the appearance of your PayPal merchant pages, do the following:
- a. Enter the name of the **Page Style** that you want to apply to your PayPal merchant pages. Options include:

paypal	Uses the PayPal page style.
primary	Uses the page style that you identified as the “primary” style in your account profile.
your_custom_ value	Uses a custom payment page style, which is specified in your account profile.

- b. In the **Header Image URL** field, enter the URL of the image that you want to appear in the upper-left corner of the payment page. The maximum file size is 750 pixels wide by 90 pixels high.

PayPal recommends that the image be located on a secure (https) server. Otherwise, the customer’s browser may warn that “the page contains both secure and nonsecure items.”

- c. Enter the six-character hexadecimal code, without the “#” symbol, for each of the following:

Header Background Color	Background color for the checkout page header.
Header Border Color	2-pixel border around the header.
Page Background Color	Background color for the checkout page and around the header and payment form.

The screenshot shows the 'Frontend Experience Settings' configuration page. At the top, there is a section for 'PayPal Product Logo' with a dropdown menu currently set to 'Now accepting PayPal (150 X 60)' and a '[STORE VIEW]' label. Below this is a section titled 'PayPal Merchant Pages Style' which contains five input fields: 'Page Style', 'Header Image URL', 'Header Background Color', 'Header Border Color', and 'Page Background Color'. Each of these five fields has a question mark icon and a '[STORE VIEW]' label to its right.

Frontend Experience Settings

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

PayPal Billing Agreements

To simplify the checkout process, customers can enter into a billing agreement with PayPal, as the payment service provider. During checkout, the customer chooses the billing agreement as the payment method. The payment system verifies the billing agreement by its unique number, and charges the customer's account. With a billing agreement in place, it is no longer necessary for the customer to enter payment information for each purchase. Customers can manage their billing agreements from the dashboard of their customer account, where the status of each is shown as “Active” or “Canceled.” When a billing agreement is canceled, it cannot be reactivated.

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. From your store, customers can sign up for a billing agreement from their customer accounts, or while checking out with PayPal Express Checkout. After a billing agreement is in place, additional billing agreements can be added only from the customer account. There is no limit to the number of billing agreements a customer can create.

During checkout, the customer chooses the billing agreement as the payment method. When the customer places the order, the billing agreement reference ID and sales order payment details are transferred to PayPal.

Sign Up at Checkout

Customers who pay for a purchase with PayPal Express Checkout can mark a checkbox to create a billing agreement. The billing agreement is not used for the current order, but becomes available as a payment method the next time the customer places an order. The billing agreement reference ID is sent to the customer and to the store.

Sign Up from Admin

On a customer's request, the store administrator can create a sales order using the customer's billing agreement.

2

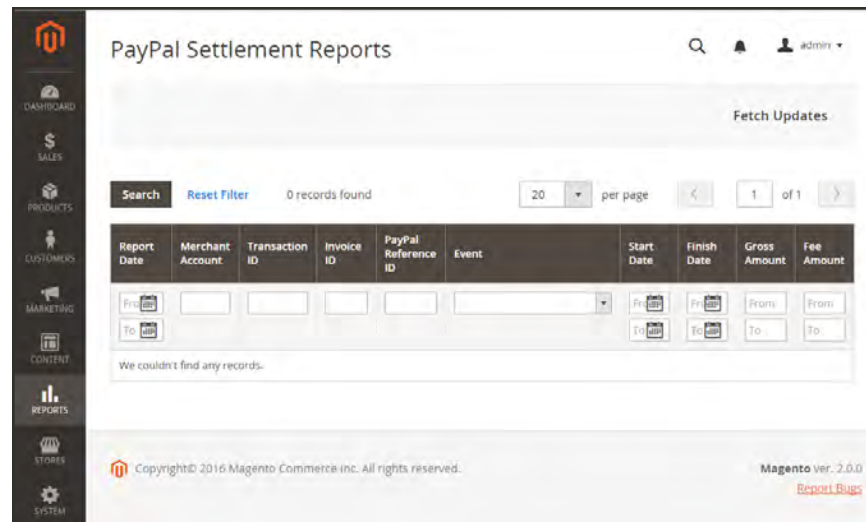
PayPal Verifies and Records Agreement. When a billing agreement is created, it is submitted to the PayPal payment system and recorded in the customer account, along with reference information. If the payment is authorized, an order is created in Magento.

PayPal Settlement Reports

The PayPal Settlement report provides the store administrator with the information about each transaction that affects the settlement of funds.

Before generating settlement reports, the store administrator must request PayPal Merchant Technical Services to create an SFTP user account, enable settlement reports generation, and enable SFTP in their PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports during the following twenty-four hours. The list of available settlement reports can be viewed from the Admin.



To view settlement reports:

1. On the Admin sidebar, tap **Reports**. Then under **Sales**, choose select **PayPal Settlement**.
2. For the most recent updates, tap **Fetch Updates** in the upper-right corner.

The system connects to the PayPal SFTP server to fetch the reports. When the process is complete, a message appears with the number of reports fetched. The report includes the following information for each transaction:

Settlement Report

FIELD	DESCRIPTION
Report Date	The date when the settlement report was generated.
Merchant Account	The encrypted merchant account number generated by PayPal.
Transaction ID	The identification of a transaction of the money moving event. Transaction ID is generated by PayPal and cannot be changed by the merchant.
Invoice ID	The identification of an invoice generated within Magento. The field can be populated with either an invoice ID sent with the capture request or with the value of the invoice ID (if any) from the authorizing transaction.
PayPal Reference ID	The identification of a related, pre-existing transaction or event.
Event Code	The code assigned to the transaction according to the event that has initiated it. Among these can be website payments standard payment, express or direct checkout API, pre-approved payment, subscription payment, and so on.
Initiation Date	The date and time the transaction was initiated.
Completion Date	The date and time the transaction was completed.
Gross Amount	The amount of the payment between the two parties and before fees.
Fee Amount	The amount of fee associated with the settlement. All transaction fees are included in this amount. Fees are never amortized across several transactions.

Field Descriptions

FIELD	DESCRIPTION
PayPal Reference ID Type	One of the following reference codes: Order ID Transaction ID Subscription ID
Preapproved Payment ID	Options include: Custom The text entered by the merchant on the transaction in PayPal. Transaction Debit or Credit The direction of money movement of gross amount. Fee Debit or Credit The direction of money movement for fee.

PayPal Fraud Management Filter

PayPal fraud management filters make it easier to detect and respond to fraudulent transactions, and can be configured to flag, hold for review, or deny riskier payments. Magento order status values changed according to the fraud filter settings.

Filter Actions

ACTION	DESCRIPTION
Review	<p>If you set the filter action to “Review,” the suspected order receives the status “Payment Review” when the order is placed. You can review the order and approve, or cancel the payment in the Admin, or on the PayPal side. When you click the Accept Payment or the Deny Payment buttons, no new transactions for the order are created.</p> <p>If you change the status of the transaction on the PayPal site, you must click the Get Payment Update button in the upper-right corner of the Order page in the Admin to apply the changes. If you click Accept Payment or Deny Payment, the changes made at the PayPal site are applied.</p>
Deny	<p>If you set the filter action to “Deny,” the suspected order cannot be placed by the customer, because the corresponding transaction is rejected by PayPal. To deny the payment from the Admin, click the Deny Payment button in the upper-right corner of the page. The order status changes to “Canceled,” the transaction is reverted, and funds are released on the customer’s account. The corresponding information is added in the Comments History section of the order view.</p>
Flag	<p>If you set the filter action to “Flag”, the suspected order gets the status “Processing” when it is placed. The corresponding transaction is marked with a “flag” in the list of the merchant account transactions.</p>

PayPal Payment Solutions

PAYPAL SOLUTION	DESCRIPTION
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.
EXPRESS CHECKOUT	
PayPal Express Checkout	
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 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 Payment Solutions (cont.)

COUNTRY	PAYPAL PAYMENT SOLUTION
	PayPal Express Checkout
United Kingdom	PayPal Payments Pro Hosted Solution (includes Express Checkout) PayPal Payments Standard PayPal Express Checkout
United States	PayPal Payments Advanced (Includes Express Checkout) PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard+ PayPal Payflow Pro (Includes Express Checkout) PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout

OTHER COUNTRIES

PayPal Express Checkout and PayPal Website Payments Standard are available in the following countries:

Argentina, Austria, Belgium, Brazil, Bulgaria, Chile, Costa Rica, Cyprus, Czech Republic, Denmark, Dominican Republic, Ecuador, Estonia, Finland, French Guiana, Gibraltar, Greece, Guadeloupe, Hungary, Iceland, India, Indonesia, Ireland, Israel, Jamaica, Latvia, Liechtenstein, Lithuania, Luxembourg, Malaysia, Malta, Martinique, Mexico, Netherlands, Norway, Philippines, Poland, Portugal, Réunion, Romania, San Marino, Singapore, Slovakia, Slovenia, South Africa, South Korea, Sweden, Switzerland, Taiwan, Thailand, Turkey, United Arab Emirates, Uruguay, Venezuela, Vietnam



CHAPTER 51:

Other Payment Solutions

Magento Community Edition 2.0 supports additional third-party payment gateways and solutions that offer merchant services in all parts of the world. Unlike some payment solutions that transfer control to another site to complete the transaction, a payment gateway makes it possible for you to accept credit card payments directly from your store without the customer leaving your site. Payment gateways and solutions include:

- [Braintree](#)
- [Authorize.Net Direct Post](#)

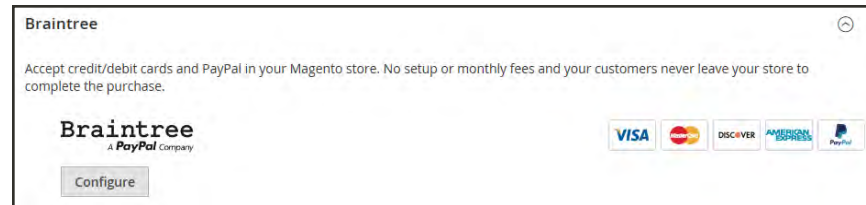
Testing Credentials

When testing the configuration of a payment gateway, use the following credentials for test transactions.

Visa	4111111111111111
MasterCard:	5555555555554444
American Express:	378282246310005
Expiration Date:	Any future date
CVV/CVC:	123 or 000

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

For step-by-step configuration instructions, see [Braintree](#) in the Magento Community Edition 2.0 online user 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 Community Edition 2.0 online user guide.

Shipping

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, you will learn how to set up a variety of shipping methods and carriers, and print shipping labels.

Contents

Shipping Settings

Shipping Policy

Basic Shipping Methods

Free Shipping

Flat Rate

Table Rate

Dimensional Weight

Carriers

UPS

USPS

FedEx

DHL

Shipping Labels

Shipping Label Workflow

Configuring Shipping Labels

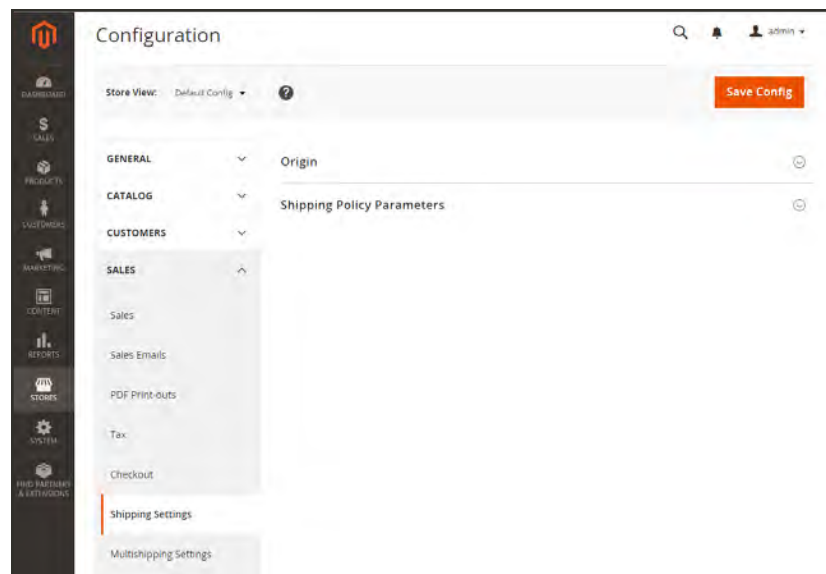
Creating Shipping Labels

CHAPTER 52:

Shipping Settings

The shipping configuration establishes the point of origin for all shipments, your shipping policy, and the handling of shipments to multiple addresses.

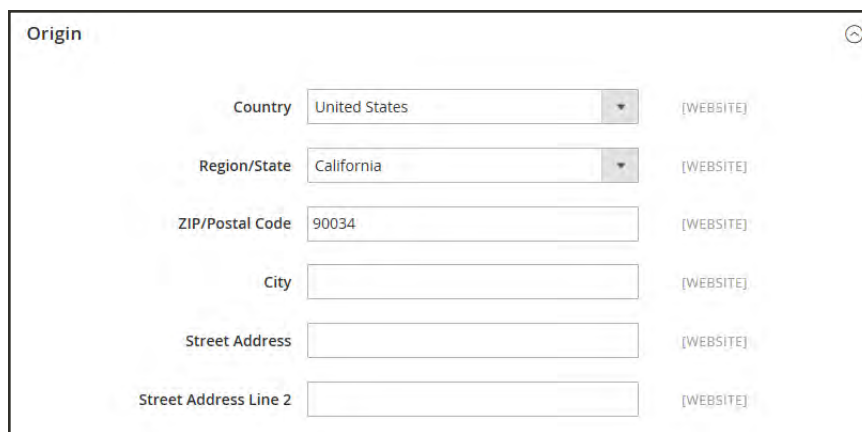
- [Point of Origin](#)
- [Shipping to Multiple Addresses](#)
- [Shipping Policy](#)



Shipping Settings

Point of Origin

The configuration establishes the point of origin for all shipments made from your store or warehouse. The point of origin is also referenced to determine the tax rate for products sold.



Origin

To establish the point of origin:

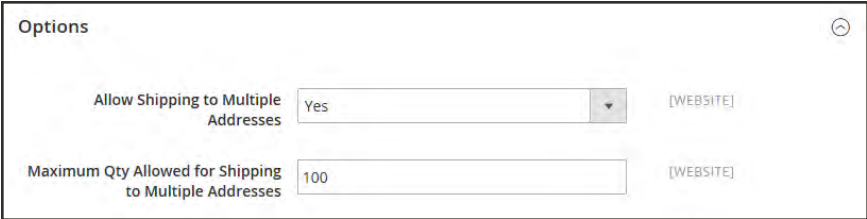
1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand ☺ the **Origin** section, and complete the following:
 - Country
 - Region / State
 - ZIP / Postal Code
 - City
 - Street Address (and line 2, if needed)
4. When complete, tap **Save Config**.

Multiple Addresses

The Multiaddress Shipping options enable customers to ship an order to multiple addresses during checkout, and determine the maximum number of addresses to which an order can be shipped.

To configure multiple address shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Multishipping Settings**.
3. Expand ☺ the **Options** section. Then, do the following:
 - a. Set **Allow Shipping to Multiple Addresses** to “Yes.”
 - b. Enter the **Maximum Qty Allowed for Shipping to Multiple Addresses**.
4. When complete, tap **Save Config**.



The screenshot shows a configuration panel titled "Options" with a close button in the top right corner. It contains two settings:

- Allow Shipping to Multiple Addresses**: A dropdown menu currently set to "Yes". To the right of the dropdown is a "[WEBSITE]" label.
- Maximum Qty Allowed for Shipping to Multiple Addresses**: A text input field containing the number "100". To the right of the input field is a "[WEBSITE]" label.

Multiaddress Shipping Options

Shipping Policy

To display your shipping policy during checkout, complete the Shipping Policy Parameters in the configuration.

The screenshot shows a configuration panel titled "Shipping Policy Parameters" with a close button in the top right corner. It contains two main settings: "Apply custom Shipping Policy" with a dropdown menu currently set to "Yes" and a "[WEBSITE]" label to its right; and "Shipping Policy" with a large empty text input field and a "[STORE VIEW]" label to its right.

Shipping Policy Parameters

To configure your shipping policy:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Settings**.
3. Expand ☑ the **Shipping Policy Parameters** section, and do the following:
 - a. Set Apply **Custom Shipping Policy** to “Yes.”
 - a. Either paste or enter your **Shipping Policy** into the text box.
4. When complete, tap **Save Config**.



CHAPTER 53:

Basic Shipping Methods

Magento Community Edition 2.0 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.

The screenshot shows the 'Free Shipping' configuration form. It includes the following fields and options:

- Enabled:** A dropdown menu set to 'Yes' with a '[WEBSITE]' label.
- Title:** A text input field containing 'Free Shipping' with a '[STORE VIEW]' label.
- Method Name:** A text input field containing 'Free' with a '[STORE VIEW]' label.
- Minimum Order Amount:** An empty text input field with a '[WEBSITE]' label.
- Displayed Error Message:** A text area containing the message 'This shipping method is not available. To use this shipping method, please contact us.' with a '[STORE VIEW]' label.
- Ship to Applicable Countries:** A dropdown menu set to 'All Allowed Countries' with a '[WEBSITE]' label.
- Ship to Specific Countries:** A multi-select dropdown menu showing a list of countries including Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. It has a '[WEBSITE]' label.
- Sort Order:** An empty text input field with a '[WEBSITE]' label.

Free Shipping

Step 1: Configure Free Shipping

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand  the **Free Shipping** section. Then, do the following:
 - a. Set **Enabled** to “Yes.”
 - b. Enter a **Title** to identify the Free Shipping method during checkout.

- c. Enter a **Method Name** to describe this shipping method.
- d. Enter the **Minimum Order Amount** to qualify for free shipping.

To use Free Shipping with **Table Rates**, make the Minimum Order Amount so high that it is never met. This prevents Free Shipping from going into effect, unless it is triggered by a price rule.

- e. In the **Displayed Error Message** box, type the message to appear if free shipping becomes unavailable.
- f. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use free shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where free shipping can be used.

- g. Set **Show Method if Not Applicable** to one of the following:

Yes	Always shows the Free Shipping method, even when not applicable.
No	Shows the Free Shipping method only when applicable.

- h. Enter a **Sort Order** number to determine the position of free shipping in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

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

Step 2: Enable Free Shipping in the Carrier Configuration

Make sure to complete any configuration that is required for each carrier that you plan to use for free shipping. For example, if your UPS configuration is otherwise complete, make the following settings to enable and configure free shipping:

1. From the Shipping Methods configuration, click to expand the **UPS** section.
2. Expand ☺ the **UPS** section. Then, set **Free Method** to “Ground.”
3. To require a minimum order for free shipping, set **Free Shipping with Minimum Order Amount** to “Enable.”
4. Enter the required amount in the **Minimum Order Amount for Free Shipping** field.
5. When complete, tap **Save Config**.

Flat Rate Shipping


Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple shipping solution, especially when used with the flat-rate packaging that is available from some carriers.

Flat Rate ⊖

Enabled	Yes <input type="text"/>	[WEBSITE]
Title	Flat Rate <input type="text"/>	[STORE VIEW]
Method Name	Fixed <input type="text"/>	[STORE VIEW]
Type	Per Item <input type="text"/>	[WEBSITE]
Price	5 <input type="text"/>	[WEBSITE]
Calculate Handling Fee	Fixed <input type="text"/>	[WEBSITE]
Handling Fee	<input type="text"/>	[WEBSITE]
Displayed Error Message	This shipping method is not available. To use this shipping method, please contact us. <input type="text"/>	
Ship to Applicable Countries	All Allowed Countries <input type="text"/>	[WEBSITE]
Ship to Specific Countries	<input type="text" value="Afghanistan"/> <input type="text" value="Åland Islands"/> <input type="text" value="Albania"/> <input type="text" value="Algeria"/> <input type="text" value="American Samoa"/> <input type="text" value="Andorra"/> <input type="text" value="Angola"/> <input type="text" value="Anguilla"/> <input type="text" value="Antarctica"/> <input type="text" value="Antigua and Barbuda"/>	
Sort Order	<input type="text"/>	[WEBSITE]

Flat Rate

To set up flat rate shipping:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Shipping Methods**.
3. Expand  the **Flat Rate** section. Then, do the following:

- a. Set **Enabled** to “Yes.”

Flat Rate appears as an option in the Estimate Shipping and Tax section of the shopping cart, and also in the Shipping section during checkout.

- b. Enter a descriptive **Title** for the Flat Rate method.
- c. Enter a **Method Name** to appear next to the calculated rate in the shopping cart. The default method name is “Fixed.” If you charge a handling fee, you can change the Method Name to “Plus Handling,” or something else that is suitable.
- d. To describe how flat rate shipping can be used, set **Type** to one of the following:

None	Disables the payment type. The Flat Rate option is listed in the cart, but with a rate of zero—which is the same as free shipping.
Per Order	Charges a single flat rate for the entire order.
Per Item	Charges a single flat rate for each item. The rate is multiplied by the number of items in the cart, regardless of whether there are multiple quantities of the same, or of different items.

- e. Enter the **Price** that you want to charge for flat rate shipping.
- f. If charging an additional handling fee, set **Calculate Handling Fee** to one of the following:
- Fixed
 - Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee. For example, if the fee is calculating based on a percentage, enter 0.06 for 6 percent. If using a fixed amount calculation, enter the fee as a decimal.

- g. In the **Displayed Error Message** box, type the message that appears if Flat Rate Shipping becomes unavailable.
- h. Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use flat rate shipping.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where flat rate shipping can be used.

- i. Enter a **Sort Order** number to determine the position of the Flat Rate in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)

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

Table Rates

The table rate shipping method references a table of data to calculate shipping rates based on a combination of conditions, including:

- Weight v. Destination
- Price v. Destination
- # of Items v. Destination

For example, if your warehouse is in Los Angeles, it costs less to ship to San Diego than to Vermont. You can use table rate shipping to pass the savings on to your customers.

The data that is used to calculate tables rates is prepared in a spreadsheet and imported into your store. When the customer requests a quote, the results appear in the shipping estimate section of the shopping cart.

Only one set of table rate data can be active at a time.



Table Rate in Shopping Cart

Process Overview:Step 1: [Complete the Default Settings](#)Step 2: [Prepare the Table Rate Data](#)Step 3: [Import the Table Rate Data](#)Step 4: [Verify the Rates](#)**Step 1: Complete the Default Settings**

The first step is to complete the default settings for table rates. You can complete this step without changing the scope of the configuration.

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Sales**, choose **Shipping Methods**.
3. Expand ☺ the **Table Rates** section. Then, do the following:
 - a. Set **Enabled** to “Yes.”
 - b. Enter the **Title** that you want to appear for table rates section during checkout. (The default title is “Best Way.”)
 - c. Enter the **Method Name** that you want to appear as a label next to the calculated rate in the shopping cart.
 - d. Set **Condition** to one of the following calculation methods:
 - Weight v. Destination
 - Price v. Destination
 - # of Items v. Destination
 - e. For orders that include virtual products, set **Include Virtual Products in Price Calculation** to “Yes” if you want to be able to include the virtual product(s) in the calculation.

Because virtual products—such as services—have no weight, they cannot change the result of a calculation that is based on the Weight v. Destination condition. However, virtual products can change the result of a calculation that is based on either the Price v. Destination or # of Items vs Destination condition.

- f. If charging a handling fee, set **Calculate Handling Fee** to one of the following:
 - Fixed
 - Percent

Then, enter the **Handling Fee** rate according to the method used to calculate the fee.

If the handling fee is based on a percent, enter the whole number without the percent sign.

- g.** In the **Displayed Error Message** box, type the message that appears when this method is not available.
 - h.** Set **Ship to Applicable Countries** to one of the following:

All Allowed Countries	Customers from any country specified in your store configuration can use table rate shipping.
Specific Countries	After choosing this option, the “Ship to Specific Countries” list appears. Select each country where customers can use table rate shipping.
 - i.** Enter a **Sort Order** number to determine where table rates appear in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
- 4.** When complete, tap **Save Config**.

Enabled	No	[WEBSITE]
Title	Best Way	[STORE VIEW]
Method Name	Table Rate	[STORE VIEW]
Condition	Weight vs. Destination	[WEBSITE]
Include Virtual Products in Price Calculation	Yes	[WEBSITE]
Calculate Handling Fee	Fixed	[WEBSITE]
Handling Fee		[WEBSITE]
Displayed Error Message	This shipping method is not available. To use this shipping method, please contact us.	[STORE VIEW]
Ship to Applicable Countries	All Allowed Countries	[WEBSITE]
Ship to Specific Countries	Afghanistan Åland Islands Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda	[WEBSITE]
Show Method if Not Applicable	No	[WEBSITE]
Sort Order		[WEBSITE]

Table Rates

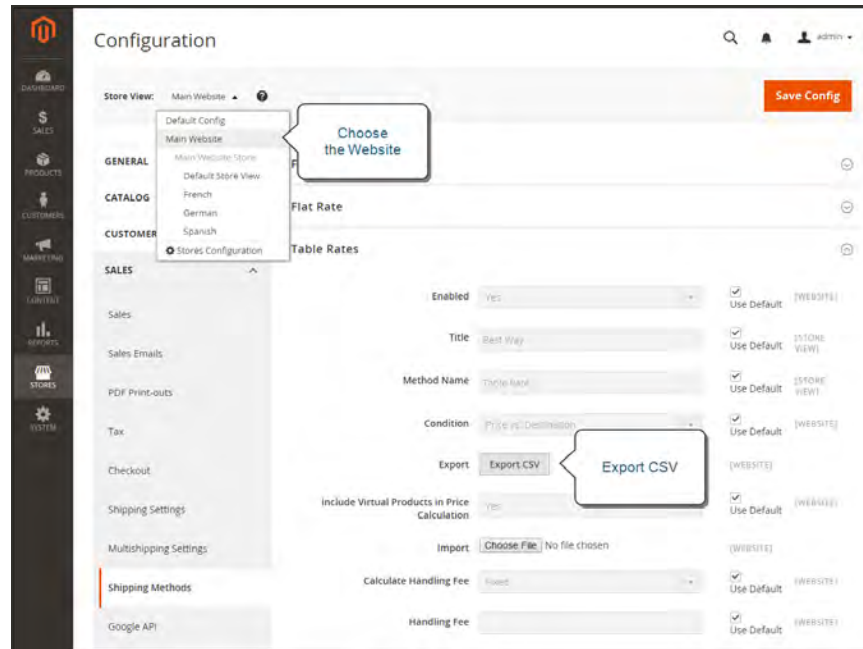
Step 2: Prepare the Table Rate Data

1. In the upper-left corner, set **Store View** to “Main Website,” or to any other website where the configuration applies.

The Export and Import options appear in the Table Rates section, with “Use Default” checkboxes to the right of each option.

To change any of the current settings, you must first clear the “Use Default” checkbox next to the field.

2. To change the **Condition**, clear the **Use Default** checkbox. Then, choose another option.
3. Tap **Export CSV**. Then, save the **tablerates.csv** file to your computer.



Export CS

4. Open the file in a spreadsheet. Then, complete the table with appropriate values for the shipping calculation condition.
 - Use an asterisk (*) as a wildcard to represent all possible values in any category.
 - The Country column must contain a valid three-character code for each row.

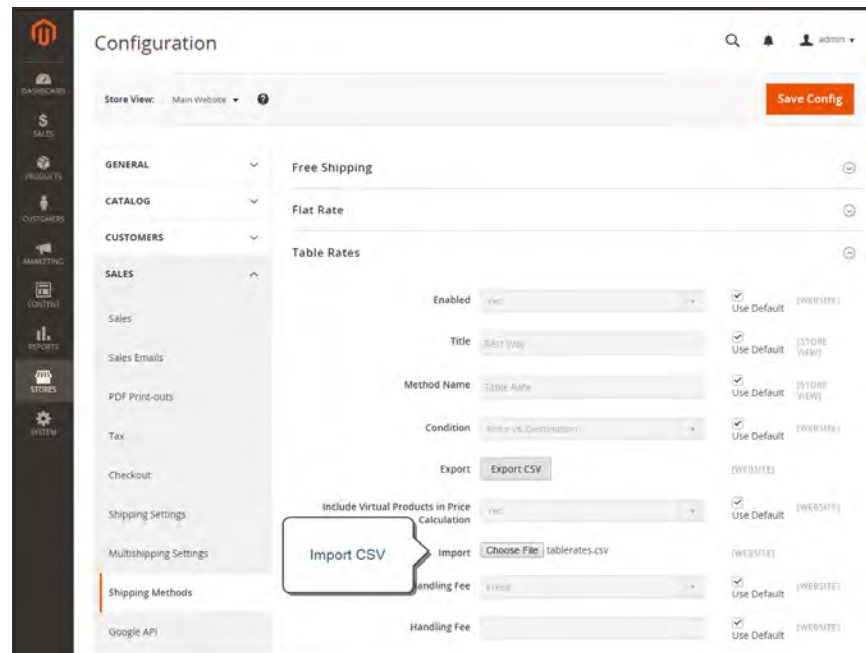
	A	B	C	D	E	F
1	Country	Region/State	Zip/Postal Code	Weight (and above)	Shipping Price	
2	USA	*	*		0	5
3	USA	*	*		10	10
4	USA	*	*		20	15
5						
6						

Weight vs. Destination

5. When complete, save the **tablerates.csv** file.

Step 3: Import the Table Rate Data

1. Return to the **Table Rates** section of your store configuration.
2. In the upper-left corner, set **Store View** to the website where this method will be used.
3. Next to the **Import** field, tap **Choose File**. Select your completed **tablerates.csv** file, and import the rates.



Import Table Rates

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

Step 4: Verify the Rates

To make sure that the table rate data is correct, go through the payment process with several different addresses to make sure the shipping and handling rates are calculated correctly.

Example 1: Price v. Destination

This example uses the Price v. Destination condition to create a set of three different shipping rates based on the amount of the order subtotal for the continental United States, Alaska, and Hawaii. The asterisk (*) is a wildcard that represents all values.

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	ORDER SUBTOTAL (and above)	SHIPPING PRICE
USA	*	*	0	15
USA	*	*	50	10
USA	*	*	100	5
USA	AK	*	0	20
USA	AK	*	50	15
USA	AK	*	100	10
USA	HI	*	0	20
USA	HI	*	50	15
USA	HI	*	100	10

Example 2: Weight v. Destination

This example uses the Weight v. Destination condition to create a set of three different shipping rates based on the weight of the order..

COUNTRY	REGION / STATE	ZIP / POSTAL CODE	WEIGHT (AND ABOVE)	SHIPPING PRICE
USA	*	*	0	5
USA	*	*	10	10
USA	*	*	20	15

Example 3: Restrict Free Shipping to the Continental United States

1. Create a `tablerates.csv` file that includes all the state destinations to which you are willing to provide free shipping.
2. Complete the table rate configuration with the following settings:

SETTING	VALUE
Condition	Price v. Destination
Method Name	Free Shipping
Ship to Applicable Countries	Specific Countries
Ship to Specific Countries	Select only United States
Show method if not applicable	No

3. Set **Store View** to the main website. Then, tap **Import** to import the `tablerates.csv` file.

Dimensional Weight

Dimensional weight, sometimes called volumetric weight, is a common industry practice that bases the transportation price on a combination of weight and package volume. In simple terms, dimensional weight is used to determine the shipping rate based on the amount of space a package occupies in the cargo area of the carrier. Dimensional weight is typically used when a package is relatively light compared to its volume.

All major carriers now apply dimensional weight to some shipments. However, the manner in which dimensional weight pricing is applied varies from one carrier to another.

- [DHL](#)
- [FedEx](#)
- [UPS](#)
- [USPS](#)

We recommend that you become familiar with the method used by each carrier to determine and apply dimensional weight. If your company has a high volume of shipments, even a slight difference in shipping price can translate to thousands of dollars over the course of a year. Magento's native shipping configuration does not include support for dimensional weight.



CHAPTER 54:

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 Community Edition 2.0 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.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

UPS now uses **dimensional weight** to determine some shipping rates.

Process Overview:

Step 1: Open a UPS Shipping Account

Step 2: Enable UPS for Your Store

Step 3: Complete the Container Description

Step 4: Set Up Handling Fees

Step 5: Specify Allowed Methods and Applicable Countries

For step-by-step instructions, see **UPS** in the Magento Community Edition 2.0 online user guide.

USPS

The United States Postal Service is the independent postal service of United States government, offering domestic and international shipping services by land and air.

Process Overview:

Step 1: Open a USPS Shipping Account

Step 2: Enable USPS for Your Store

Step 3: Complete the Packaging Description

Step 4: Set Up Handling Fees

Step 5: Specify Allowed Methods and Applicable Countries

For step-by-step instructions, see [USPS](#) in the Magento Community Edition 2.0 online user guide.

FedEx

FedEx is one of the world's largest shipping service companies, providing air, freight, and ground shipping services with several levels of priorities.

FedEx now uses **dimensional weight** to determine some shipping rates.

Process Overview:

Step 1: Register for FedEx Web Services Production

Step 2: Enable FedEx for Your Store

Step 3: Package Description and Handling Fee

Step 4: Allowed Methods and Applicable Countries

For step-by-step instructions, see [FedEx](#) in the Magento Community Edition 2.0 online user guide.

DHL

DHL offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

Process Overview:

Step 1: Enable DHL

Step 2: Enter Package Description and Handling Fee

Step 3: Specify Allowed Shipping Methods

Step 4: Specify Applicable Countries

For step-by-step instructions, see [DHL](#) in the Magento Community Edition 2.0 online user guide.

CHAPTER 55:

Shipping Labels

Magento Community Edition 2.0 includes a high level of integration with major shipping carriers, which gives you access to carrier shipping systems to track orders, create shipping labels, and more. Shipping labels can be created for regular shipments and products with return merchandise authorization. In addition to the information provided by the shipping carrier, the label also includes the Magento order number, number of the package, and the total quantity of packages for the Magento shipment.



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: Verity the Country of Manufacture

The country of manufacture is required for all products that are shipped internationally by USPS and FedEx, If you have many products that need to be updated, you can either **import** the updates, or use the Inventory grid to update multiple records.

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

Method 1: Update a Single Record

- a. In the grid, find the product to be updated, and open in edit mode.
- b. In the panel on the left under **Advanced Settings**, choose **Autosettings**.
- c. Update the **Country of Manufacture** field.
- d. When complete, tap **Save**.

The screenshot shows the 'Autosettings' panel in a Magento admin interface. The panel is titled 'Autosettings' and has an 'Add Attribute' button in the top right corner. The settings are organized into several sections:

- Short Description:** A rich text editor with a toolbar containing bold, italic, underline, font family, font size, text color, background color, bulleted list, numbered list, and HTML options. A 'WYSIWYG Editor' button is below the editor.
- Visibility:** A dropdown menu set to 'Catalog, Search'.
- Set Product as New from Date:** A date input field with a calendar icon.
- Set Product as New to Date:** A date input field with a calendar icon.
- Country of Manufacture:** A dropdown menu. A callout box with a blue border and the text 'Country of Manufacture' points to this field.
- Allow Gift Message:** A dropdown menu set to 'No' and a checked checkbox for 'Use Config Settings'.
- Allow Gift Wrapping:** A dropdown menu set to 'Yes' and a checked checkbox for 'Use Config Settings'.
- Price for Gift Wrapping:** A text input field with a dollar sign prefix.
- Enable RMA:** A dropdown menu set to 'Use config'.

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.

The screenshot shows a form titled "Origin" with a collapse icon in the top right. The form contains the following fields:

- Country: United States (dropdown menu) [WEBSITE]
- Region/State: California (dropdown menu) [WEBSITE]
- ZIP/Postal Code: 90034 [WEBSITE]
- City: [empty text box] [WEBSITE]
- Street Address: [empty text box] [WEBSITE]
- Street Address Line 2: [empty text box] [WEBSITE]

Origin


- b. In the panel on the left under **Sales**, choose **Shipping Methods**. Then, expand ☺ the **USPS** section, and verify that the following fields are complete:

Secure Gateway URL	Magento automatically enters the gateway URL.
Password	The password is provided by USPS, and gives you access to their system through Web Services.
Length, Width Height, Girth	The default dimensions of the package. To make these fields appear, set Size to “Large.”

- c. Expand  the **FedEx** section, and verify that the following fields are complete:

- Meter Number
- Key
- Password

This information is provided by the carrier, and is required to gain access to their system through Web Services.

- d. In the panel on the left under **General**, choose **General**. Expand  the **Store Information** section, and verify that the following fields are complete:

Store Name	The name of the store or store view.
Store Contact Telephone	The telephone number of the primary contact for the store or store view.
Country	The country where your store is based.
VAT Number	If applicable the Value Added Tax number of your store. (Not required for stores based in the U.S.)
Store Contact Address	The street address of the primary contact for the store or store view.

- e. If you have multiple stores, and the contact information differs from the default, set **Store View** for each, and verify that the information is complete. If the information is missing, you'll get an error when you try to print the labels.

Store Information ⌵

Store Name [STORE VIEW]

Store Phone Number [STORE VIEW]

Store Hours of Operation [STORE VIEW]

Country [WEBSITE]

Region/State [WEBSITE]

ZIP/Postal Code [WEBSITE]

City [WEBSITE]

Street Address [WEBSITE]

Street Address Line 2 [WEBSITE]

VAT Number [WEBSITE]

Store Information

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

Carrier Requirements

CARRIER	REQUIREMENTS
USPS	Requires a USPS account.
UPS	Requires a UPS account. Shipping labels are available only for shipments that originate in the U.S. Specific credentials are required for stores outside the US.
FedEx	Requires a FedEx account. For stores outside of the U.S., shipping labels are supported for international shipments only. FedEx does not allow domestic shipments that originate outside of the U.S
DHL	Requires a DHL account. Shipping labels are supported only for shipments that originate in the U.S.

Creating Shipping Labels

To create shipping labels, you must first set up your shipping carrier account to support labels. Then, follow the prompts to enter a description of the package and its contents.

Process Overview:

Step 1: [Contact Your Shipping Carriers](#)

Step 2: [Update the Configuration for Each Carrier](#)

Step 3: [Create Shipping Labels](#)

Step 4: [Print the Labels](#)

Step 1: Contact Your Shipping Carriers

Before you begin, make sure that your shipping accounts are set up to process labels. Some carriers might charge an additional fee to add shipping labels to your account.

1. Contact each carrier that you use to activate shipping labels for your store.
2. Follow the instructions provided by each carrier to add shipping label support to your account.

FedEx Contact [FedEx Web Services](#) regarding their label evaluation process.

USPS Contact uspstechsupport@esecurecare.net 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	<p>Package types differ by carrier and method. The default package type for each carrier is initially selected.</p> <p>USPS does not require the package type for domestic shipments.</p>
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	<p>(Optional) The package dimensions are used for custom packages only. You can specify the measurements units as inches or centimeters.</p> <p>Not Required No confirmation of delivery is sent to the store by the shipping carrier.</p> <p>No Signature A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.</p> <p>Signature Required The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.</p> <p>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.</p> <p>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.</p> <p>Contents (USPS Only) Select one of the following descriptions of the package:</p>

Required Carrier Configuration Settings (cont.)

SETTING	DESCRIPTION
	<ul style="list-style-type: none"> 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	<p>Specifies the type of a package. Select one of the predefined values. Available package types are different for each shipping carrier.</p> <p>When the Create Packages pop-up window opens, the default package for the shipping carrier appears in the Type field. If you select a package that is not designed by a shipping carrier, you must enter the dimensions of the package.</p> <p>For shipping labels created for DHL, FedEx, and UPS shipments, the “Type of Goods” field is set to “Merchandise.” For USPS, the Type field reflects the value from the Contents field in the Create Packages window.</p>
Total Weight	<p>The total weight of a package. The field is pre-populated with the total weight of products in a package. The unit of measurement can be set to either pounds or kilograms.</p>
Length	<p>The length of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The unit of measurement can be set to either inches or centimeters.</p>

Field Descriptions (cont.)

FIELD	DESCRIPTION
Width	The width of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.
Height	The height of a package, integer and floating point numbers. The field is enabled if the custom package type is used. The measurement units can be specified using the drop-down menu next to the Height field; select between inches and centimeters.
Signature	Confirmation Defines delivery confirmation. Options: <ul style="list-style-type: none"> Not Required No delivery confirmation letter is sent to you. No Signature A delivery confirmation letter without a recipient's signature is sent to you. Signature Required The shipping carrier obtains the recipient's signature and provides you with its printed copy. Adult Required The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Direct (FedEx only)	FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.
Indirect (FedEx only)	FedEx obtains a signature in one of three ways: (1) from someone at the delivery address; (2) from a neighbor, building manager or other person at a neighboring address; or (3) the recipient can leave a signed FedEx Door Tag authorizing release of the package without anyone present. Available for residential deliveries only. The options may vary slightly for different shipping methods. For the most up to date information refer to shipping carrier's resources.

Field Descriptions (cont.)

FIELD	DESCRIPTION
Contents	(Available for USPS shipments only) Description of the package contents. Options: Gift Documents Commercial Sample Returned Goods Merchandise Other
Explanation	(USPS shipments only) Detailed description of the package content.

REPORTS

Reports Menu

Refresh Statistics

Marketing Reports

Review Reports

Sales Reports

Customer Reports

Product Reports

Contents

Reports Menu

Marketing Reports

Review Reports

Sales Reports

Customer Reports

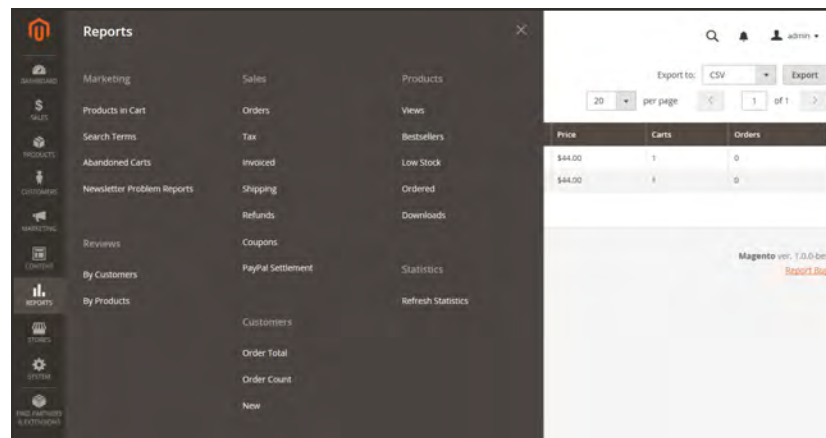
Product Reports

Statistics

CHAPTER 56:

Reports Menu

Magento Community Edition 2.0 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

Menu Options



Marketing Reports

A selection of marketing reports, including Products in Cart, Search Terms, Abandoned Carts, and Newsletter Problem Reports.



Review Reports

The selection of product review reports includes By Customer and By Product.



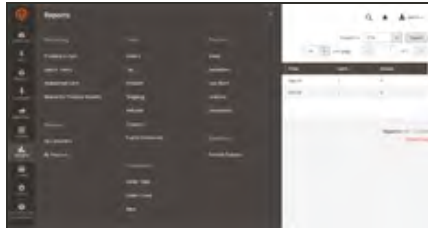
Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.



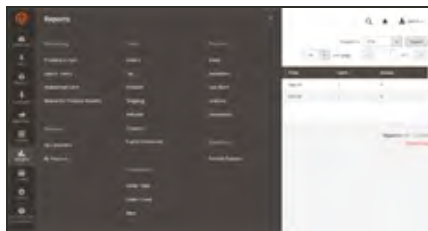
Customer Reports

The selection of customer reports includes Order Total, Order Account, and New.



Product Reports

The selection of product reports includes Views, Bestsellers, Low Stock, Ordered, and Downloads.



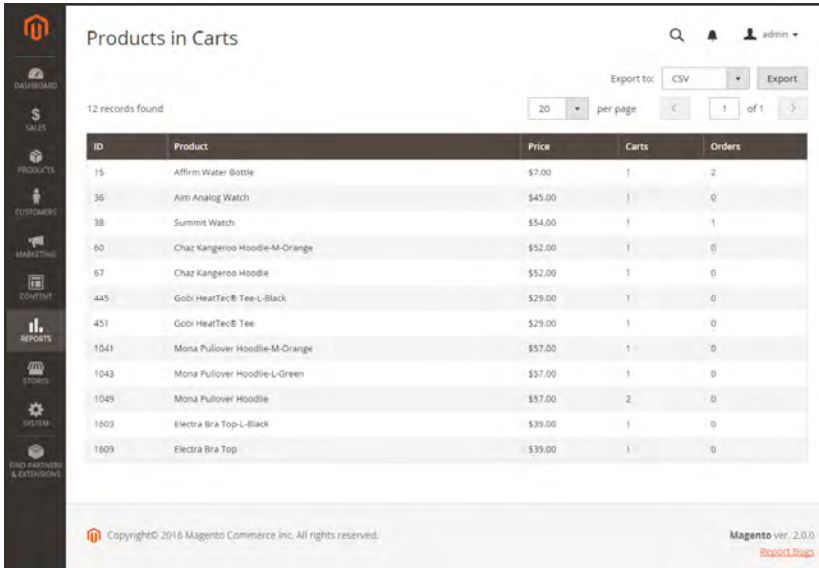
Statistics

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.

CHAPTER 57:

Marketing Reports

Marketing reports provide information about the status of shopping carts, the use of search terms, and newsletter transmissions.



Products in Carts

12 records found

Export to: CSV Export

20 per page 1 of 1

ID	Product	Price	Carts	Orders
15	Affirm Water Bottle	\$7.00	1	2
36	Aim Analog Watch	\$45.00	1	0
38	Summit Watch	\$54.00	1	1
60	Chaz Kangaroo Hoodie-M-Orange	\$52.00	1	0
67	Chaz Kangaroo Hoodie	\$52.00	1	0
445	Gobi HeatTec® Tee-L-Black	\$29.00	1	0
451	Gobi HeatTec® Tee	\$29.00	1	0
1041	Mona Pullover Hoodie-M-Orange	\$57.00	1	0
1043	Mona Pullover Hoodie-L-Green	\$57.00	1	0
1049	Mona Pullover Hoodie	\$57.00	2	0
1003	Electra Bra Top-L-Black	\$39.00	1	0
1009	Electra Bra Top	\$39.00	1	0

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[Report Bugs](#)

Products in Cart Report

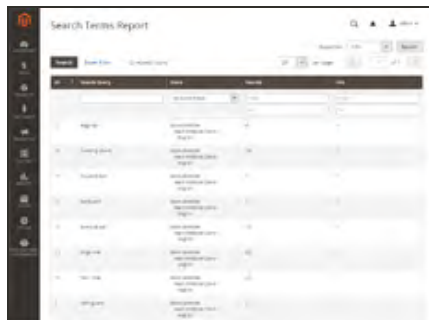
Reports



The screenshot shows the 'Products in Carts' report interface. It features a table with columns for 'Product', 'Price', 'Carts', and 'Orders'. The table lists various products such as 'Milk', 'Eggs', and 'Bread' with their respective prices, the number of carts containing them, and the number of orders placed.

Products in Cart

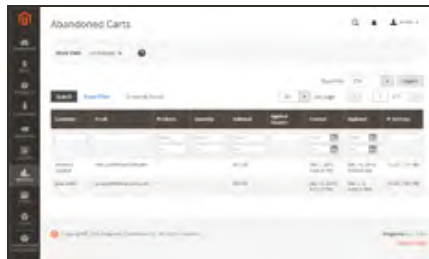
The Products in Cart Report lists all products currently in shopping carts, and includes the name and price of each item, the number of carts with the item, and the number of times each item has been ordered.



The screenshot shows the 'Search Terms Report' interface. It displays a table with columns for 'Search Term', 'Number of Items', and 'Number of Searches'. The table lists search terms like 'Milk', 'Eggs', and 'Bread' along with the number of items found in the catalog and the number of times each term was searched.

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.



The screenshot shows the 'Abandoned Carts' report interface. It displays a table with columns for 'Customer', 'Product', 'Quantity', 'Subtotal', 'Created', and 'Updated'. The table lists customer information, the products in their abandoned carts, the quantity of each product, the subtotal, and the dates when the cart was created and last updated.

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.



The screenshot shows the 'Newsletter Problems Report' interface. It displays a table with columns for 'Subscriber', 'Queue Date', 'Subject', and 'Error'. The table lists subscriber information, the date the newsletter was queued, the subject of the newsletter, and the error message that occurred during transmission.

Newsletter Problems

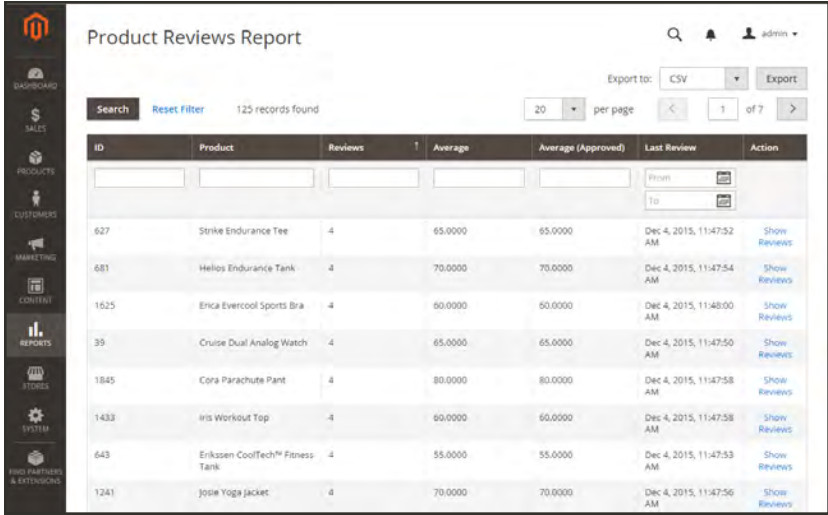
The Newsletter Problems Report includes information about any newsletter queue that failed to transmit successfully. The report includes the name of each subscriber, and queue date and subject, the information about the error.

CHAPTER 58:

Review Reports

The Review Reports provide information about product reviews by customer and by product.

- By Customers
- By Products



Product Reviews Report

Search [Reset filter](#) 125 records found

Export to: CSV [Export](#)

20 per page 1 of 7

ID	Product	Reviews	Average	Average (Approved)	Last Review	Action
627	Strike Endurance Tee	4	65.0000	65.0000	Dec 4, 2015, 11:47:52 AM	Show Reviews
681	Helios Endurance Tank	4	70.0000	70.0000	Dec 4, 2015, 11:47:54 AM	Show Reviews
1525	Erica Evercool Sports Bra	4	60.0000	60.0000	Dec 4, 2015, 11:48:00 AM	Show Reviews
39	Cruise Dual Analog Watch	4	65.0000	65.0000	Dec 4, 2015, 11:47:50 AM	Show Reviews
1845	Cora Parachute Pant	4	80.0000	80.0000	Dec 4, 2015, 11:47:58 AM	Show Reviews
1433	Iris Workout Top	4	60.0000	60.0000	Dec 4, 2015, 11:47:58 AM	Show Reviews
643	Eriksen CoolTech™ Fitness Tank	4	55.0000	55.0000	Dec 4, 2015, 11:47:53 AM	Show Reviews
1241	Josie Yoga Jacket	4	70.0000	70.0000	Dec 4, 2015, 11:47:56 AM	Show Reviews

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.

Product	Reviews	Average Rating	Last Review	Action
Product 1	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 2	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 3	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 4	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 5	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 6	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 7	1	5.0000	Aug 12, 2014 11:00 AM	View
Product 8	1	5.0000	Aug 12, 2014 11:00 AM	View

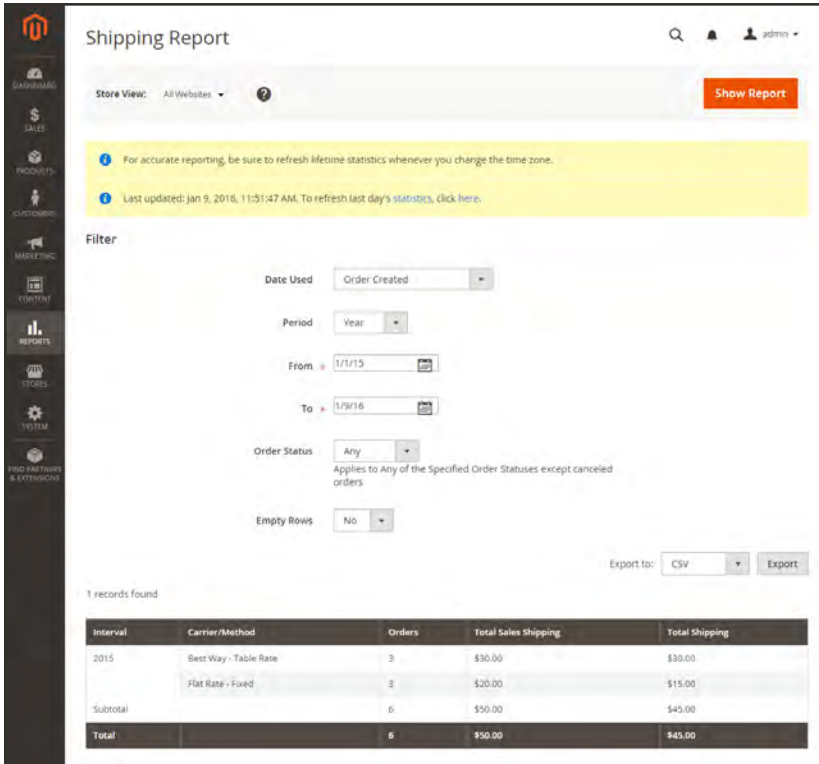
By Products

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 59:

Sales Reports

The selection of sales reports includes Orders, Tax, Invoiced, Shipping, Refunds, Coupons, and PayPal Settlement.



Shipping Report

Store View: All Websites Show Report

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.

Last updated: Jan 9, 2016, 11:51:47 AM. To refresh last day's statistics, click here.

Filter

Date Used: Order Created

Period: Year

From: 1/1/15

To: 1/9/16

Order Status: Any
Applies to Any of the Specified Order Statuses except canceled orders

Empty Rows: No

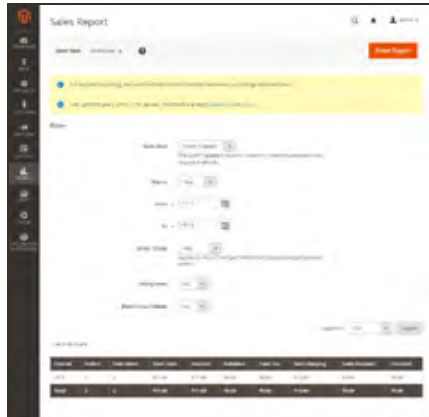
Export to: CSV Export

1 records found

Interval	Carrier/Method	Orders	Total Sales Shipping	Total Shipping
2015	Best Way - Table Rate	3	\$30.00	\$30.00
	Flat Rate - Fixed	3	\$20.00	\$15.00
Subtotal		6	\$50.00	\$45.00
Total		6	\$50.00	\$45.00

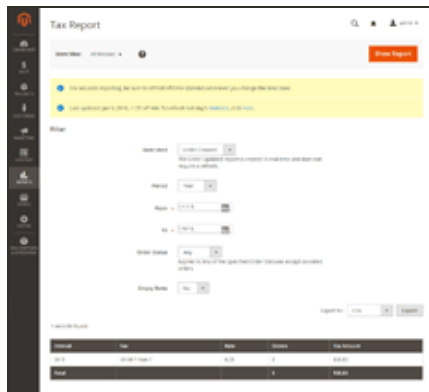
Shipping Report

Reports



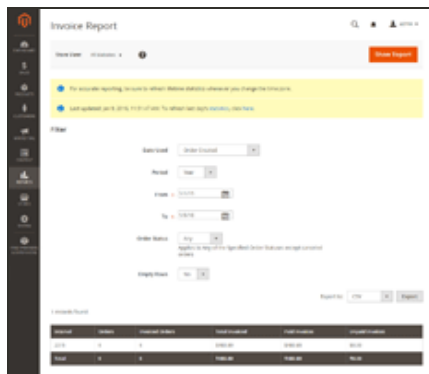
Orders

The Orders Report can be filtered by time interval, date and status. The report includes the number of orders placed and canceled, with totals for sales, amounts invoiced, refunded, tax collected, shipping charged, and discounts.



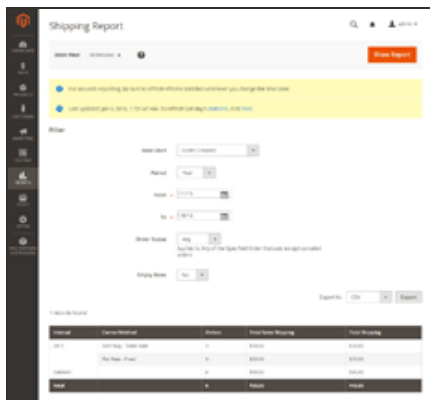
Tax

The Tax Report can be filtered by time interval, date, and status. The report includes the tax rule applied, tax rate, number of orders, and amount of tax charged.



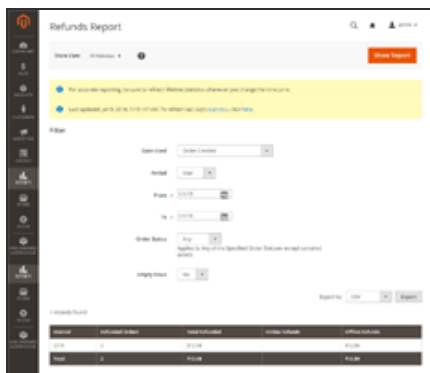
Invoiced

The Invoice Report can be filtered by time interval, date, and status. The report includes the number of orders and invoices during the time period, with amounts invoiced, paid, and unpaid.



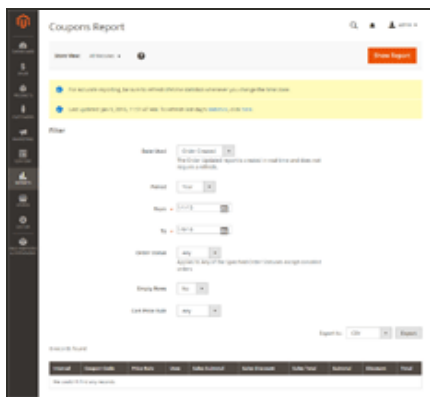
Shipping

The Shipping Report can be filtered by time interval, date, and status. The report includes the number of orders for carrier or shipping method used, with amounts for total sales shipping and total shipping.



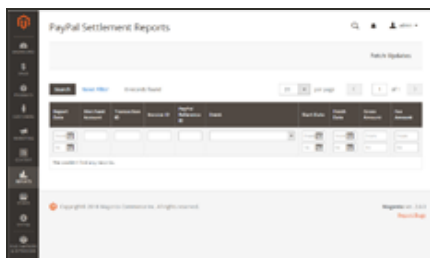
Refunds

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.



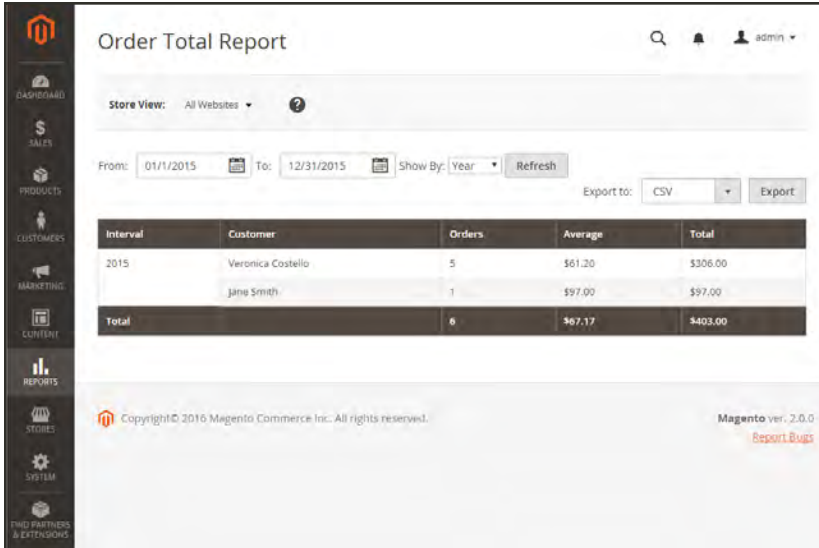
PayPal Settlement

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 60:

Customer Reports

Customer reports provide insight into customer activity during a specified period of time or date range.



Order Total Report

Store View: All Websites

From: 01/1/2015 To: 12/31/2015 Show By: Year Refresh

Export to: CSV Export

Interval	Customer	Orders	Average	Total
2015	Veronica Costello	5	\$61.20	\$306.00
	Jane Smith	1	\$97.00	\$97.00
Total		6	\$67.17	\$403.00

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[Report Bugs](#)

Order Total Report

Reports

Order	Customer	Orders	Average	Total
2015	Veronica Cousins	1	\$67.20	\$67.20
2015	John Smith	1	\$67.20	\$67.20
Total		1	\$67.20	\$67.20

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	Customer	Orders	Average	Total
2015	Veronica Cousins	1	\$67.20	\$67.20
2015	John Smith	1	\$67.20	\$67.20
Total		1	\$67.20	\$67.20

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.

Order	New Accounts
2015	1
Total	1

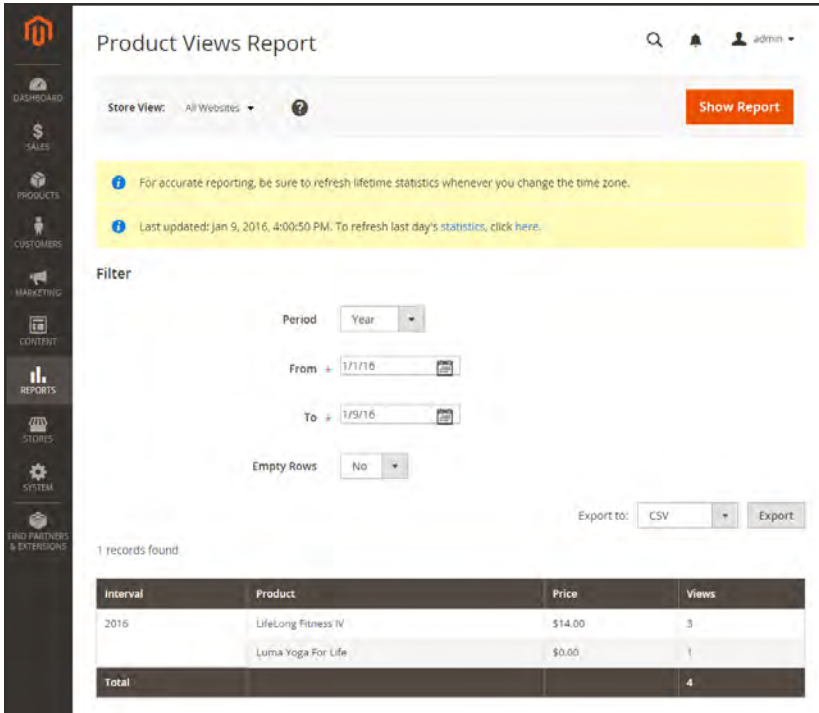
New Accounts

The New Accounts Report shows the number of new customer accounts opened during a specified time interval or date range.

CHAPTER 61:

Product Reports

The product reports give you insight regarding products viewed and ordered, bestsellers, stock levels, and downloads.



Product Views Report

Store View: All Websites Show Report

For accurate reporting, be sure to refresh lifetime statistics whenever you change the time zone.
Last updated: Jan 9, 2016, 4:00:50 PM. To refresh last day's statistics, click here.

Filter

Period: Year
From: 1/1/16
To: 1/9/16
Empty Rows: No

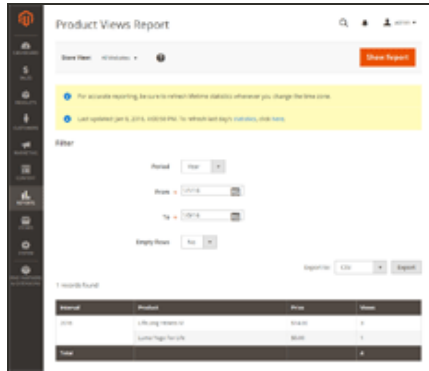
Export to: CSV Export

1 records found.

Interval	Product	Price	Views
2016	LifeLong Fitness IV	\$14.00	3
2016	Luma Yoga For Life	\$0.00	1
Total			4

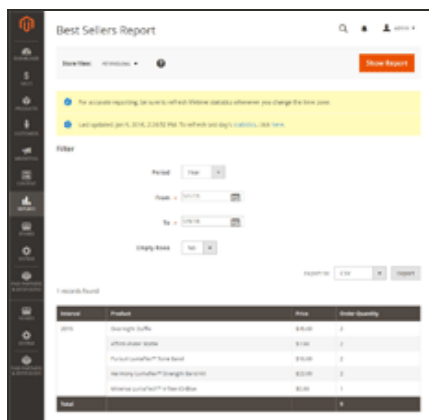
Product Views Report

Reports



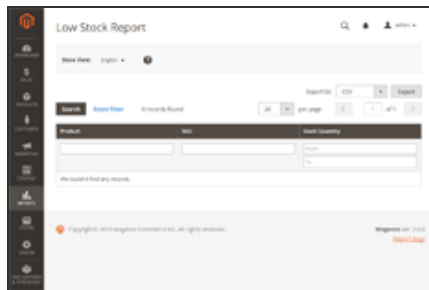
Product Views

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.



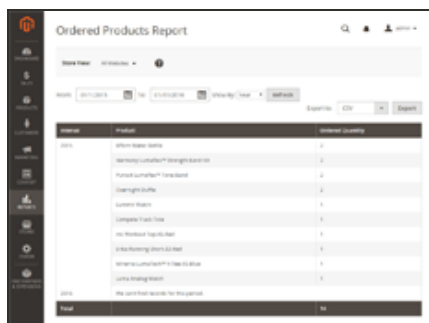
Bestsellers

The Bestsellers Report shows the five top-selling products during an interval of time or date range. The report includes the product name, price, and quantity ordered.



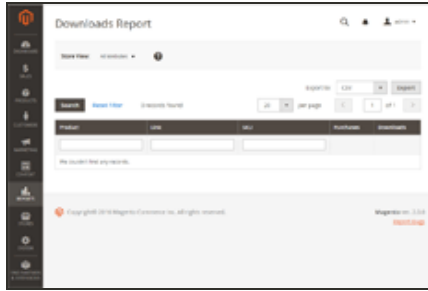
Low Stock

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.

Refresh Statistics

To reduce the performance impact of generating sales reports, Magento calculates and stores the required statistics for each report. Rather than recalculate the statistics every time a report is generated, the stored statistics are used, unless you refresh the statistics. To include the most recent data, the report statistics must be refreshed before a sales report is generated.

The screenshot shows the 'Refresh Statistics' page in the Magento Admin interface. The page title is 'Refresh Statistics'. Below the title, there is a dropdown menu set to 'Refresh Statistics for the Last Day' and a 'Submit' button. To the right of the 'Submit' button, it says '8 records found'. The main content is a table with the following columns: 'Report', 'Description', and 'Updated'. The table contains the following data:

Report	Description	Updated
<input type="checkbox"/> Orders	Total Ordered Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/> Tax	Order Taxes Report-Grouped by Tax Rates	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/> Shipping	Total Shipped Report	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/> Total Invoiced	Total Invoiced VS Paid Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/> Total Refunded	Total Refunded Report	Dec 31, 2015, 12:00:04 AM
<input type="checkbox"/> Coupons	Promotion Coupons Usage Report	undefined
<input type="checkbox"/> Bestsellers	Products Bestsellers Report	Dec 31, 2015, 12:00:05 AM
<input type="checkbox"/> Most Viewed	Most Viewed Products Report	undefined

At the bottom of the page, there is a copyright notice: 'Copyright© 2015 Magento Commerce Inc. All rights reserved.' and the Magento version: 'Magento ver. 2.0.0'. There is also a link for 'Report Bugs'.

Refresh Statistics

To refresh report statistics:

1. On the Admin sidebar, tap **Reports**. Then under Statistics, choose **Refresh Statistics**.
2. In the list, mark the checkbox of each report to be refreshed.
3. Set the **Actions** control to one of the following:
 - Refresh Lifetime Statistics
 - Refresh Statistics for the Last Day
4. When complete, tap **Submit**.

OPERATIONS

Stores

System

Contents

In this section of the guide, you'll learn how to set up a store hierarchy, create attributes, and manage the settings used by each store to calculate taxes, and currency rates,

Stores Menu

All Stores

- Creating a Store View

- Creating a Store

- Creating a Website

- Store URLs

Configuration

Taxes

- Tax Rules

- Tax Zones and Rates

- Value Added Tax (VAT)

 - Configuring VAT

 - VAT ID Validation

 - Configuring VAT ID Validation

- Tax Quick Reference

- International Tax Guidelines

 - U.S. Tax Guidelines

 - Canadian Tax Guidelines

 - EU Tax Guidelines

- Warning Messages

Currency

- Currency Configuration

- Currency Symbols

- Updating Currency Rates

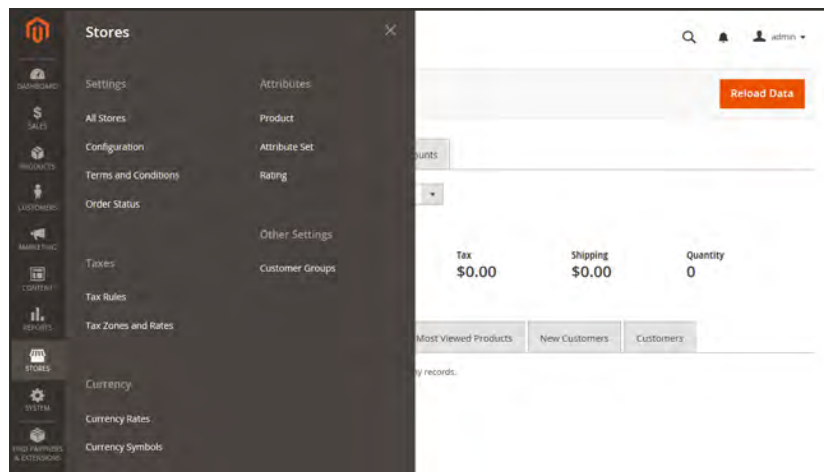
Attributes

- Product Attributes

- Creating an Attribute

CHAPTER 62:**Stores Menu**

The Stores menu manages settings that are used less frequently, but referenced throughout your Magento installation, including setting up the store hierarchy, configuration, sales and order settings, tax and currency, product attributes, product review ratings, and customer groups.



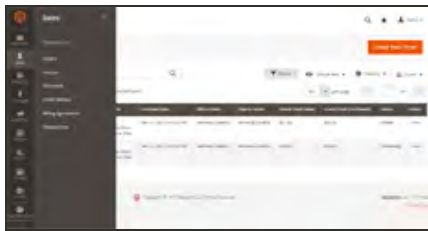
Stores Menu

Menu Options



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

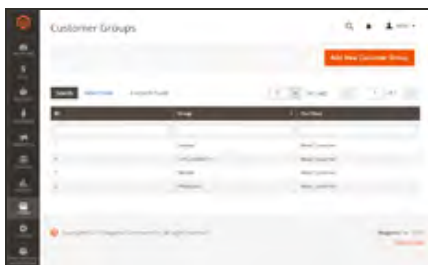
Manage the rates for the currencies that are accepted as payment in your store, and customize the currency symbols that appear in product prices and sales documents.



Attributes

Manage all attributes that are used in products and product ratings. You can create new attributes, edit existing attributes, manage product templates, and set up product review ratings.

Other Settings



Customer Groups

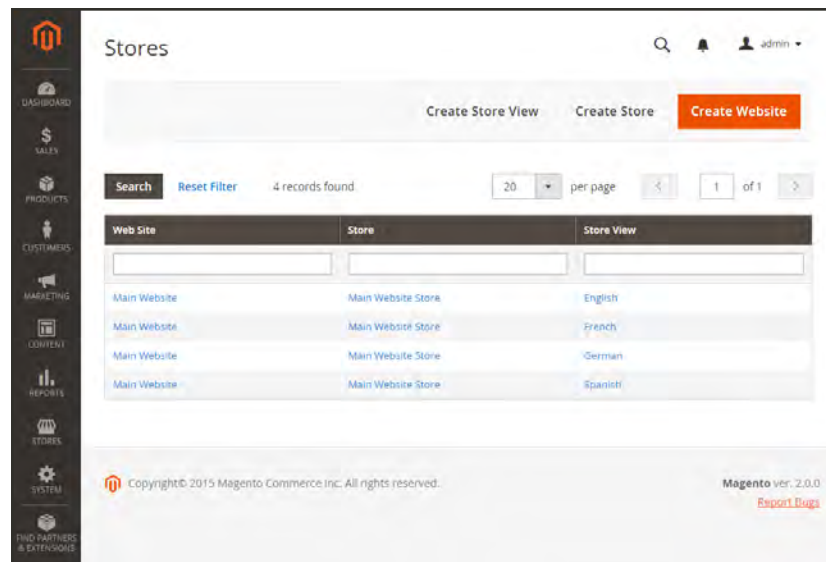
Customer groups determine which discounts are available, and the tax class that is associated with the group.

CHAPTER 63:

All Stores

When Magento Community Edition 2.0 is installed, a main website, and store view are created. You can create additional websites, stores, and store views, as needed. For example, in addition to your main website, you might have a additional websites with separate domains. Within each website, you can have multiple stores, and within each store, separate store views. Many installations have one website and one store, but with multiple store views to support different languages.

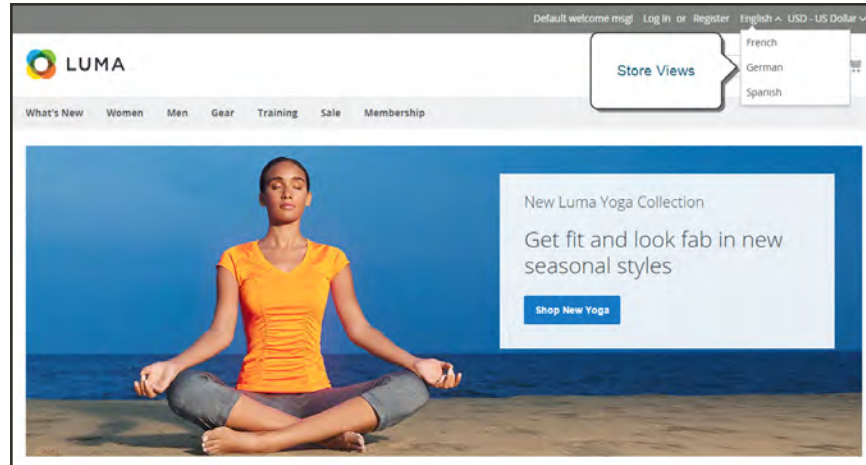
Before you begin, plan your store hierarchy in advance because it is referred to throughout the configuration. Each store can have a separate **root category**, which makes it possible to have an entirely different set of main menu options for each store.



All Stores

Creating a Store View

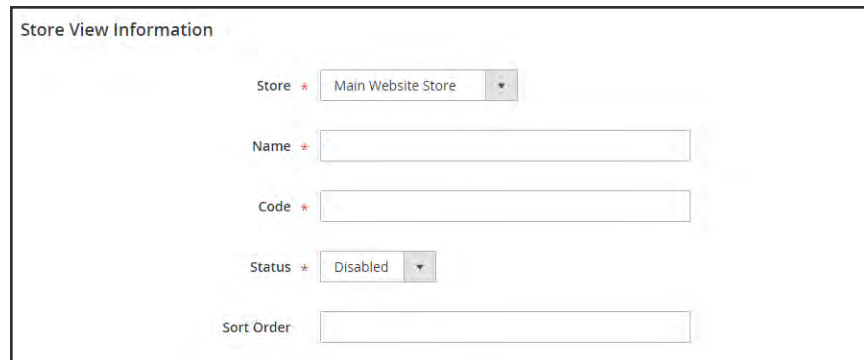
Store views are typically used to make the store available in different **languages**. Shoppers can use the language chooser in the header of the store to change the store view.



Store Views in Language Chooser

To create a new store view:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store View**. Then, do the following:



Store View Information

- a. Set **Store** to the parent store of this view.
 - b. Enter a **Name** for this store view. The name appears in the language chooser in the 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**.

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.

At the time of this writing, there are no language packs available for Magento 2.0, although many are in development. Check the current availability of language packs for Magento 2.x on [Magento Marketplace / Connect](#). As soon as language packs become available, we will add complete instructions here.

After changing 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. Language packs are not required to translate content.

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**.

Creating a Store

Before you begin, take some time to plan your store hierarchy because it is referred to throughout the configuration. Each store can have a separate **root category**, which makes it possible to have a different main menu for each store.

A single installation of Magento can have multiple stores that share the same Admin. Multiple stores can share the same domain, be set up as subdomains of the same domain, or have entirely different domains. Stores that have the same IP address and domain, use the same security certificate, and share a single checkout process. If you want each store to have a dedicated checkout process under its own domain, each store must have a distinct IP address with a separate security certificate. Here are some examples of how URLs can be configured for multiple stores:

```
yourdomain.com/store1  Each store has a different path, but shares the same domain.  
yourdomain.com/store2  
  
store1.yourdomain.com  Each store has a different subdomain of the primary domain.  
store2.yourdomain.com  
  
store1.com              Each store has a dedicated domain.  
store2.com
```

The important thing to understand is that the stores use the same Magento code, share the same Admin, and catalog. They can, however, have different identities, product selections, and themes.

Process Overview:

Step 1: **Choose the Store Domain**

Step 2: **Create the New Store**

Step 3: **Create a Default Store View**

Step 4: **Configure the Store URL**

Step 1: Choose the Store Domain

The first step is to choose how you want to position the store. Will the stores share the same domain, each have a subdomain, or have distinctly different domains? For each store, do one of the following:

- To place the store one level below the primary domain, you don't have to do anything.
- Set up a subdomain of your primary domain.
- Set up a different primary domain.

Step 2: Create the New Store

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Tap **Create Store**. Then, do the following:
 - a. Choose the **Web Site** that is to be the parent of the new store. If the installation has only one web site, accept the default, "Main Website."
 - b. Enter a **Name** for the new store. The name is for internal reference only.
 - c. Set **Root Category** to the **root category** that defines the category structure for the main menu of the new store. If you have already created a specific root category for the store, select it. Otherwise, select "Default Category." You can come back later and update the setting.

Store Information

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

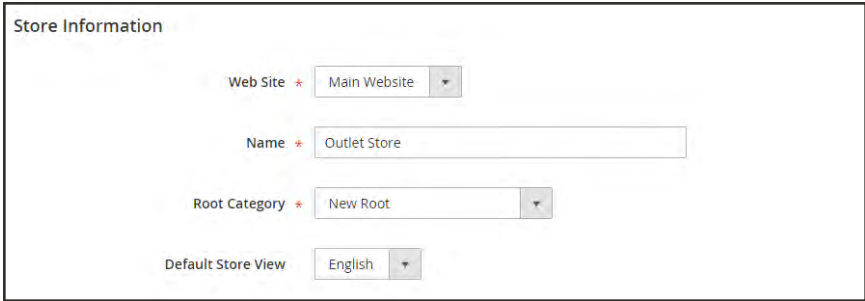
Web Site	Store	Store View
<input type="text"/>	<input type="text"/>	<input type="text"/>
Main Website	Main Website Store	English
Main Website	Main Website Store	French
Main Website	Main Website Store	German
Main Website	Main Website Store	Spanish
Main Website	Outlet Store	

New Store

Step 3: Create a Default Store View

1. Tap **Create Store View**. Then, do the following:
 - a. Set **Store** to the new store you created.
 - b. Enter a **Name** for the view. For example, "English."
 - c. Enter a **Code** for the view in lowercase characters.
 - d. Set **Status** to "Enabled."
 - e. In the **Sort Order** field, enter a number to determine the store's position when listed with other stores.
2. Tap **Save Store View**.

If you were to open your store in edit mode, you would see that it now has a default view.



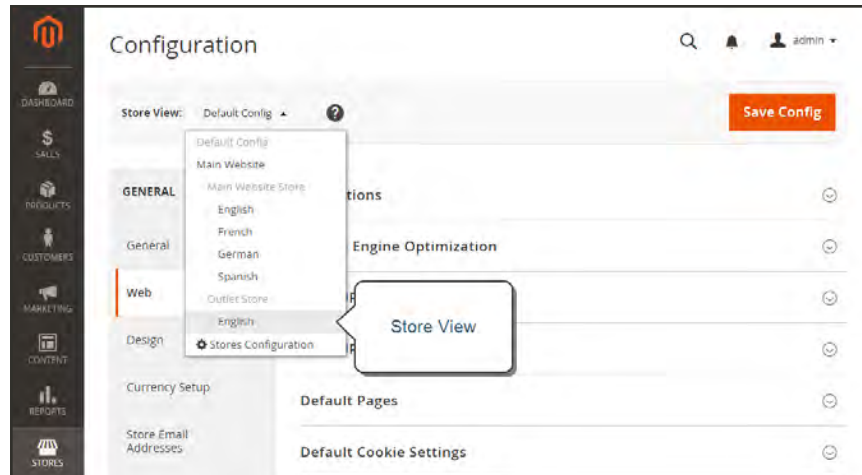
The screenshot shows a form titled "Store Information" with the following fields:

- Web Site ***: A dropdown menu with "Main Website" selected.
- Name ***: A text input field containing "Outlet Store".
- Root Category ***: A dropdown menu with "New Root" selected.
- Default Store View**: A dropdown menu with "English" selected.

New Store with Default View

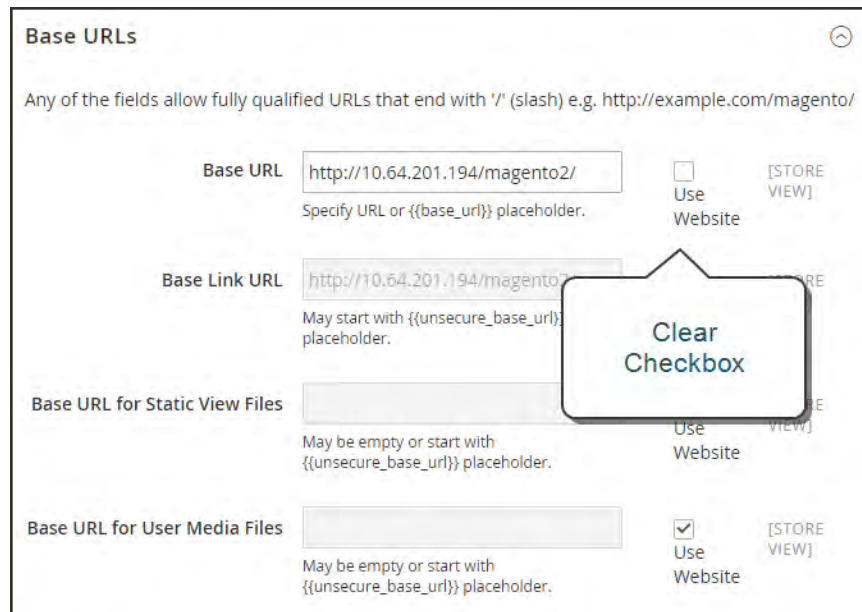
Step 4: Configure the Store URL

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

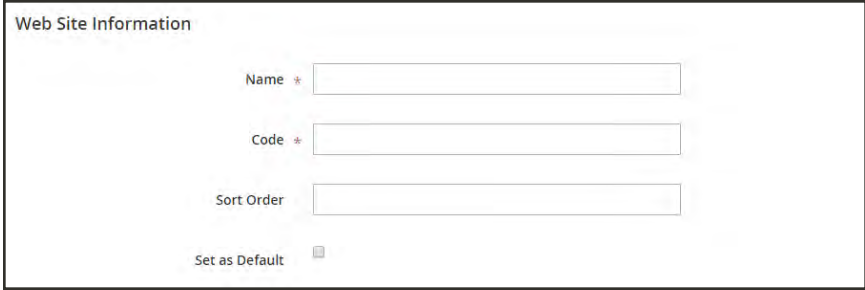
- 5. Expand ☺ the **Secure Base URLs** section, and repeat the previous step as needed to configure the store's **secure URL**.
- 6. When complete, tap **Save Config**.

Creating a Website

Multiple websites can be set up that use the same Magento installation. The websites can be set up to use the same domain, or different domains.

Step 1: Create a New Website

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **All Stores**.
2. Tap **Create Website**. Then, do the following:



The screenshot shows a form titled "Web Site Information". It contains three text input fields: "Name *", "Code *", and "Sort Order". Below these fields is a checkbox labeled "Set as Default".

Website Information

- a. In the **Name** field, enter the domain of the new website. For example, “domain.com.”
 - b. Enter a **Code** that will be used on the server to point to the domain. The code must begin with a lower-case letter, and can include any combination of letters (a-z), numbers (0-9), and the hyphen (-) character.
 - c. (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.
 - d. To make this the default website for your Magento installation, mark the **Set as Default** checkbox.
3. When complete, tap **Save Website**.
 4. Set up each **store** and **store view** that is needed for the new website.

Step 2: Configure the Store URL

Follow the instructions to configure the **store URLs**.

Store URLs

Each website in a Magento installation has a base URL that is assigned to the storefront and another URL that is assigned to the Admin. If you have a security certificate for your domain, you can configure either or both base URLs to operate over an encrypted SSL channel. All Magento resources and operations can be used over a secure SSL channel.

Standard base URLs begin with “http,” and secure base URLs begin with “https.” Magento uses variables to define internal links in relation to the base URL, which makes it possible to move an entire store from one location to another without updating the links.

Base URL	<code>http://www.yourdomain.com/magento/</code>
Secure Base URL	<code>https://www.yourdomain.com/magento/</code>
URL with IP address	<code>http://###.###.###.###/magento/</code>

The base URLs that are associated with your store were initially set up during the Web Configuration step of the [Magento installation](#). If you had a security certificate available at the time, you could also choose to use secure (https) URLs for the store, Admin, or both. If you didn't have a domain or security certificate at the time of the installation, make sure to update the configuration before launching your store.

If your Magento installation includes multiple stores, or if you plan to later add more stores, you can have the option to include the store code in the URL.

Important! Do not change the Admin URL from the default Base URL configuration. To change the Admin URL or path, see: [Using a Custom Admin URL](#).

To configure the Base URL:

1. On the Admin sidebar, tap **Stores**. Then under Settings, choose **Configuration**.
2. In the panel on the left, under General, choose **Web**.
3. Expand ☺ the **Base URL** section, and do the following:
 - a. Enter the fully qualified **Base URL** for your store. Make sure to end the URL with a forward slash, so it can be extended with additional URL Keys from your store. For example:

```
http://yourdomain.com/
```

Do not change the placeholder in the **Base Link URL** field. It is a placeholder that is used to create relative links to the base URL.

- b. (Optional) To specify an alternate location for the **Base URL for Static View Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

- c. (Optional) To specify an alternate location for the **Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{unsecure_base_url}}
```

For a typical installation, there is no need to update the paths for the static view files or media files because they are relative to the base URL.

Base URLs

Any of the fields allow fully qualified URLs that end with '/' (slash) e.g. http://example.com/magento/

Base URL	<input type="text" value="http://10.64.201.194/magento2/"/>	[STORE VIEW]
	Specify URL or {{base_url}} placeholder.	
Base Link URL	<input type="text" value="{{unsecure_base_url}}"/>	[STORE VIEW]
	May start with {{unsecure_base_url}} placeholder.	
Base URL for Static View Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{unsecure_base_url}} placeholder.	
Base URL for User Media Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{unsecure_base_url}} placeholder.	

Base URLs

Placeholders enclosed in double braces are markup tags for variables.

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

To include the store code in URLs:

1. On the Admin sidebar, tap **System**. Then under Settings, choose **Configuration**.
2. In the panel on the left, under **General**, choose **Web**.
3. Expand ☺ the **URL Options** section.
4. Set **Add Store Code** to your preference.

URL with Store Code

```
http://www.yourdomain.com/magento/store-view/index.php/url-identifier
```

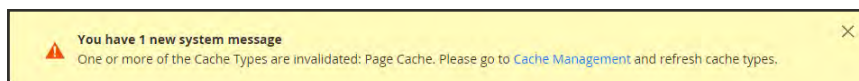
URL without Store Code

```
http://www.yourdomain.com/magento/index.php/url-identifier
```



URL Options

5. When complete, tap **Save Config**.
6. After the setting is saved, you will be prompted to refresh the cache. Tap the **Cache Management** link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.



Refresh Cache

To configure the secure base URL:

If your domain has a valid security certificate, you can configure the URLs for either the storefront and Admin—or both—to run over a secure (https) channel. Without a security certificate, your store cannot automatically switch to a secure channel (https) for transactions that normally take place over an encrypted, secure socket layer (SSL).

1. Expand ☯ the **Base URLs (Secure)** section. Then, do the following:
 - a. Enter the full **Secure Base URL**, followed by a forward slash. For example:

```
https://yourdomain.com/
```

- b. Do not change the placeholder in the **Secure Base Link URL** field. It is a placeholder that is used to create relative links to the secure base URL.

- c. (Optional) To specify an alternate location for the **Secure Base URL for Static View Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

- d. (Optional) To specify an alternate location for the **Secure Base URL for User Media Files**, enter the path starting with the following placeholder:

```
{{secure_base_url}}
```

- e. If you want to run the entire storefront over a secure (https) channel, set **Use Secure URLs in Frontend** to “Yes.”
- f. If you want to run the entire Admin over a secure (https) channel, set **Use Secure URLs in Admin** to “Yes.”

Base URLs (Secure) ⊞

Any of the fields allow fully qualified URLs that end with '/' (slash) e.g. https://example.com/magento/

Secure Base URL	<input type="text" value="{{unsecure_base_url}}"/>	[STORE VIEW]
	Specify URL or {{base_url}}, or {{unsecure_base_url}} placeholder.	
Secure Base Link URL	<input type="text" value="{{secure_base_url}}"/>	[STORE VIEW]
	May start with {{secure_base_url}} or {{unsecure_base_url}} placeholder.	
Secure Base URL for Static View Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{secure_base_url}}, or {{unsecure_base_url}} placeholder.	
Secure Base URL for User Media Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{secure_base_url}}, or {{unsecure_base_url}} placeholder.	
Use Secure URLs on Storefront	<input type="text" value="No"/> ▼	[STORE VIEW]
	Enter https protocol to use Secure URLs on Storefront.	
Use Secure URLs in Admin	<input type="text" value="No"/> ▼	[GLOBAL]
	Enter https protocol to use Secure URLs in Admin.	
Offloader header	<input type="text" value="SSL_OFFLOADED"/>	[GLOBAL]

Base URLs (Secure)

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

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 the overused “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. Set **Use Custom Admin URL** to “Yes.” 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.

- b. Set **Custom Admin Path** to “Yes.” 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**.

After the changes are saved, you must log in to the Admin 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

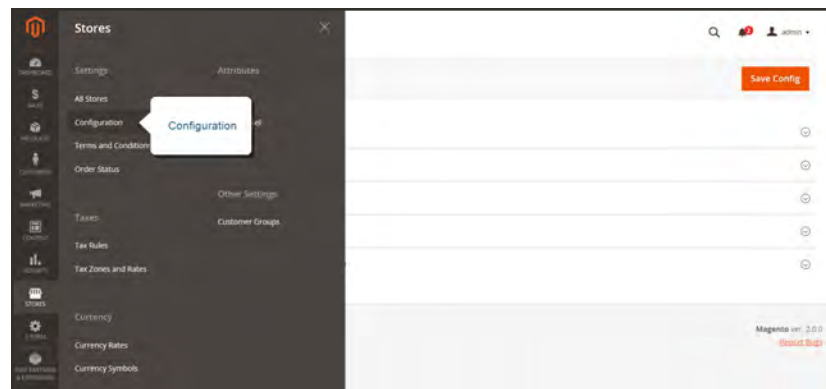
```
# <frontName><![CDATA[backend]]></frontName>
```

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 64:

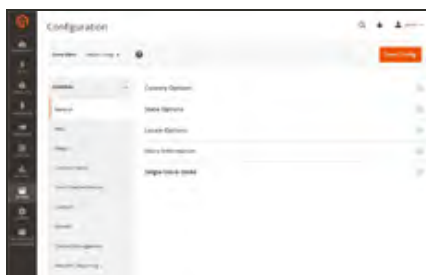
Configuration

The [Configuration Reference](#) has field descriptions for every configuration setting in Magento Community Edition 2.0. To learn how to apply configuration settings to specific store views, see: [Configuration Scope](#).



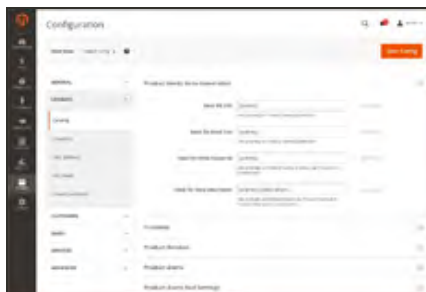
Configuration

Configuration Tabs



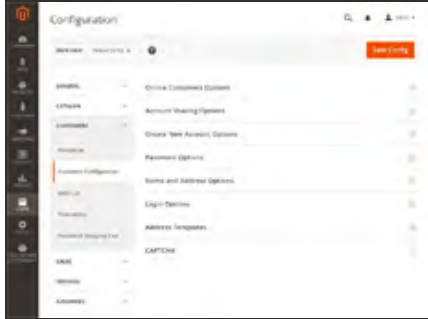
General

Includes basic configuration settings for the store, URLs, theme, currency, email addresses, store contacts, editor, and dashboard reports.



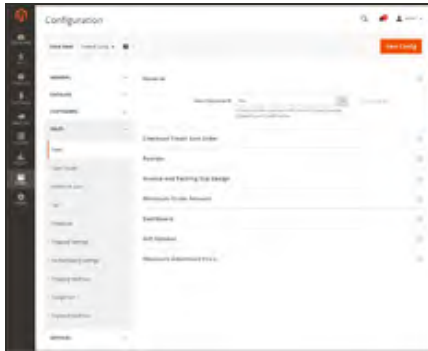
Catalog

Determines product and inventory settings, controls sitemap and RSS feed generation, and specifies the email template that is used to share products with friends.



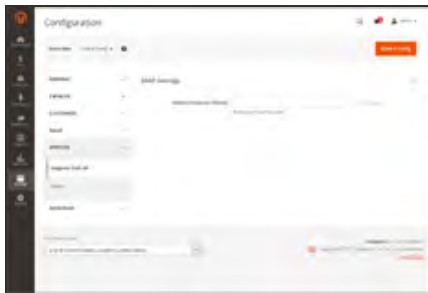
Customers

Establishes basic customer account and login options, newsletter settings, , wish list, and the format of auto-generated coupon codes.



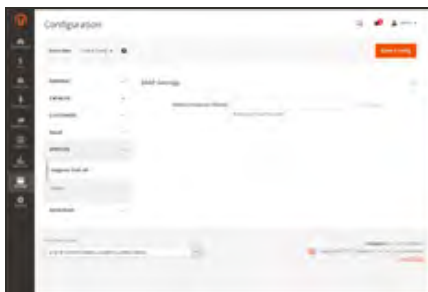
Sales

Determines checkout and tax settings, payment and shipping options, sales email and PDF print-outs, and GoogleAPI settings.



Services

Configures Magento API settings, including SOAP and OAuth.



Advanced

Determines default Admin settings, various system configuration settings, advanced module controls, and developer tools.



CHAPTER 65:

Taxes

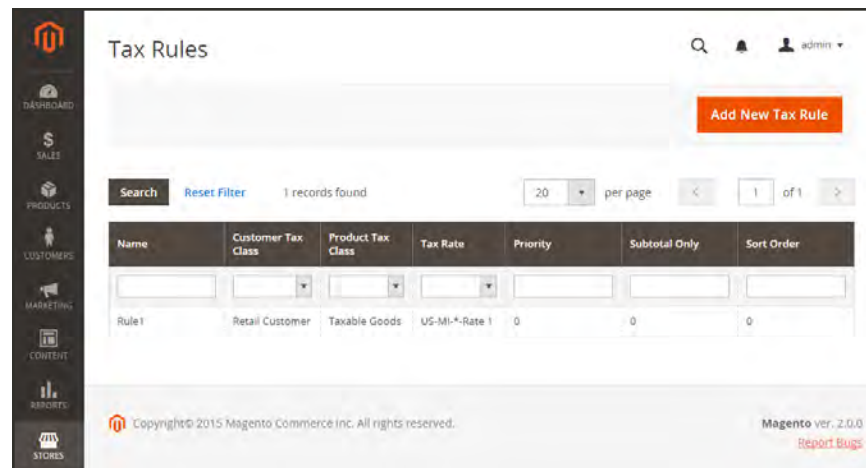
In this section of the guide, you will learn how to set up taxes according to the requirements of your locale. You can set up tax classes for products and customer groups, and create tax rules that combine product and customer classes, tax zones, and rates. In addition, you'll learn more advanced topics such as setting up fixed product taxes, compound taxes, and displaying consistent prices across international borders. If you are required to collect a value-added tax, you will learn how to set up your store to automatically calculate the appropriate amount with validation.

Magento provides a variety of options to define taxes. Tax classes are used to define “tax rules.” Tax rules are a combination of a Product Class, a Customer Class and a Tax Zone and Rate. Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union.

Tax Rules


Tax rules incorporate a combination of product class, customer class and tax rate. Each customer is assigned to a customer class, and each product is assigned a product class. Magento analyzes the shopping cart of each customer and calculates the appropriate tax according to the customer and product classes, and the region (based on the customer's shipping address, billing address or shipping origin).

When numerous taxes must be defined, you can simplify the process by importing them.



Tax Rules

Step 1: Complete the Tax Rule Information

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Rules**.
2. In the upper-right corner, tap **Add New Tax Rule**.
3. Under Tax Rule Information, 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:

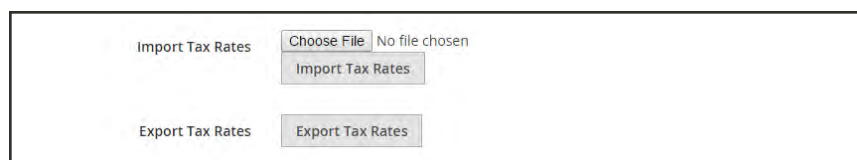
Method 1: Enter Tax Rates Manually

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

Customer Tax Class *

Product Tax Class *

Priority *
Tax rates at the same priority are added, others are compounded.

Calculate Off Subtotal Only

Sort Order *

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.



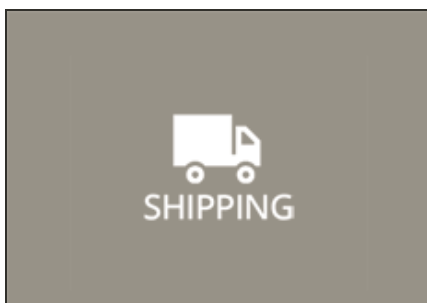
Customer

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 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.

Fixed Product Tax

Some tax jurisdictions have a fixed tax that must be added to certain types of products. You can set up a fixed product tax (FPT) as needed for your store's tax calculations. For example, in some countries FPT can be used to set up a Waste Electrical and Electronic Equipment Directive (WEEE) tax, also known as "ecological tax" or "eco tax," that is collected on certain types of electronics to offset the cost of recycling. This tax is a fixed amount, rather than a percentage of the product price.

Fixed product taxes apply at the item level, based on the product. In some jurisdictions this tax is subject to an additional % tax calculation. Your tax jurisdiction might also have rules about how the product price appears to customers, either with or without tax. Be sure that you understand the rules, and set your FPT display options accordingly.

We recommend that you exercise caution when quoting FPT prices in email, because the difference in price can affect customer confidence in their orders. For example, if you display Order Review prices without showing FPT, customers who buy items with associated FPT will see a total that includes the FPT tax amount, but without an itemized breakdown. The difference in price might lead some customers to abandon their carts because the total differs from the amount expected.

FPT Display Prices

FPT	DISPLAY SETTING AND CALCULATION	
Not Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is added to the base price of an item; but is not included in tax- rule-based calculations.
	Excluding FPT, FPT Description, Final Price	Prices appear without FPT amount or description. FPT is not included in tax-rule-based calculations.
Taxed	Excluding FPT	FPT appears as a separate row in the cart, and the value is used in appropriate tax calculations.
	Including FPT	FPT is included in the price of an item, and no change to tax calculations is required.
	Excluding FPT, FPT Description, Final Price	Prices appear without the FPT amount or description. However, FPT is included in tax-rule-based calculations.

Configuring FPT


Magento has a Fixed Product Tax **input type** that creates the section of fields that is needed to manage the 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 price display location. (The options are the same for each location.)

LOCATION	OPTIONS
Product View Page	<ul style="list-style-type: none"> • Including FPT Only
Sales Modules	<ul style="list-style-type: none"> • Including FPT and FPT description • Excluding FPT. Including FPT description and final price
Emails	<ul style="list-style-type: none"> • 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.**

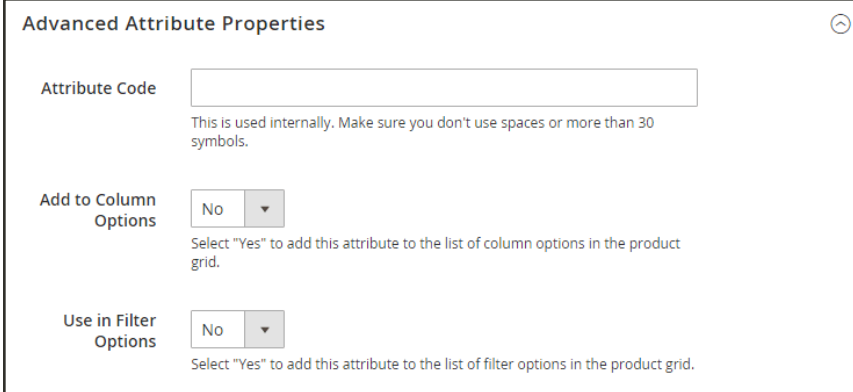
Step 2: Create an FPT Attribute

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

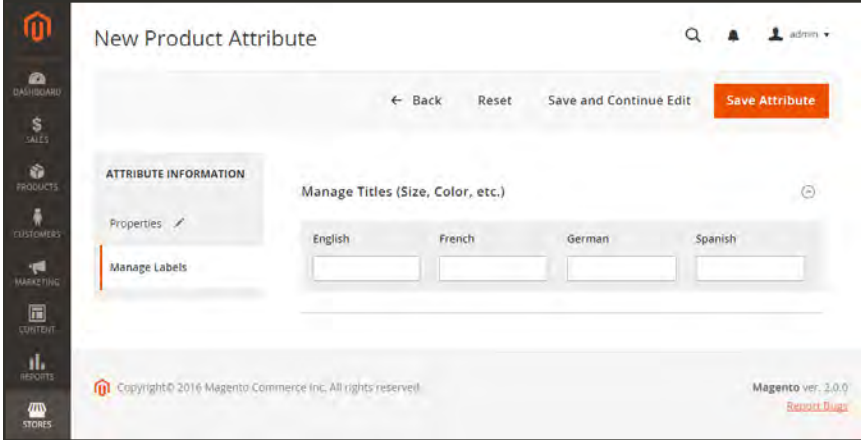
3. Expand ☺ the **Advanced Attribute Properties** section. Then, do the following:
 - a. In the **Attribute Code** field, enter a unique identifier in lowercase, without spaces or special characters. The maximum length is 30 characters. You can leave the field blank to the text from the Default Label 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.

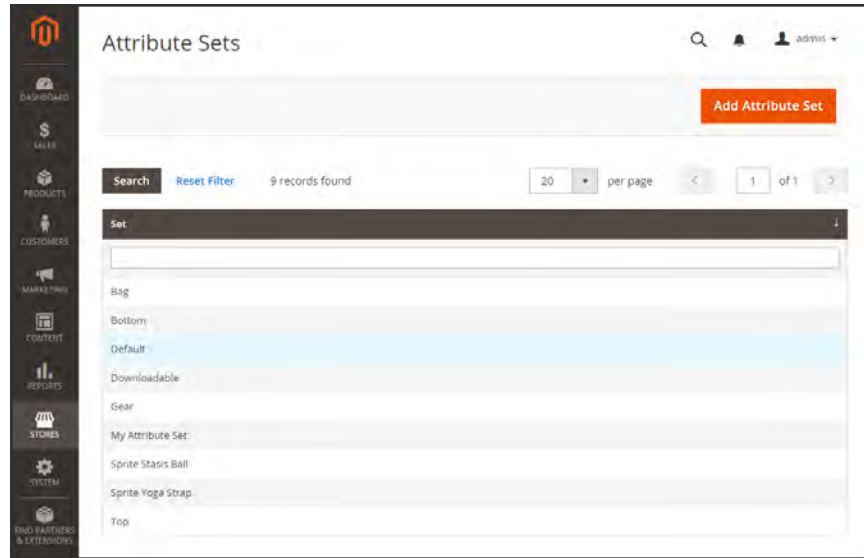


Manage Labels

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

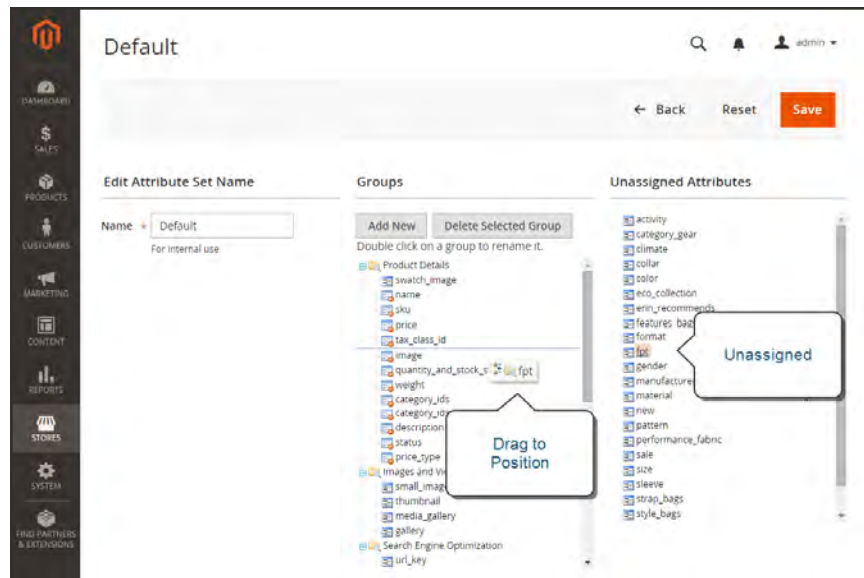
Step 3: Add the FPT Attribute to an Attribute Set

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:

FPT	Website	Country/State	Tax	Action
	All Web: ▾	Belgium ▾	0.30	Delete Tax
Add Tax				

Fixed Product Tax for Belgium

- a. If your Magento installation has multiple websites, choose the appropriate **Website** and base currency. In this example, the field is set by default to “All Websites [USD],”
 - a. Set **Country/State** to the region where the fixed product tax applies.
 - b. Enter the fixed product tax as a decimal amount in the **Tax** field.
 - c. To add more fixed product taxes, tap **Add Tax**, and repeat the process.
4. When complete, tap **Save**.

EU Place of Supply

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 billing address. The law requires merchants to run a tax report and identify the relevant tax amounts for digital goods, as opposed to physical goods.

Merchants must report all digital goods sold by EU member countries on a quarterly basis to a central tax administration, along with payment due for tax collected during the period.

Merchants who have not yet reached the threshold (50k/100k Euro of annual business) must continue to report physical goods sold to the EU states where they have registered VAT numbers.

Merchants who are audited for taxes paid for digital goods, must provide two pieces of supporting information to establish the customer place of residence.

- The customer's billing address and a record of a successful payment transaction can be used to establish the customer place of residence. (Payment is accepted only if the billing address matches payment provider information.)
- The information can also be captured directly from the data store in the Magento database tables.

To collect digital goods tax information:

1. Load the tax rates for all EU member countries.
2. Create a digital goods product tax class.
3. Assign all your digital goods to the digital goods product tax class.
4. Create **tax rules** for your physical goods, using physical product tax classes, and associate them with the appropriate tax rates.
5. Create tax rules for your digital goods, using use the product tax class for digital goods, and associate them with the appropriate tax rates for EU member countries.
6. Run the tax report for the appropriate period, and collect the required digital goods information.
7. Export the tax amounts that are related to the tax rates for the digital goods product tax class.

See also:

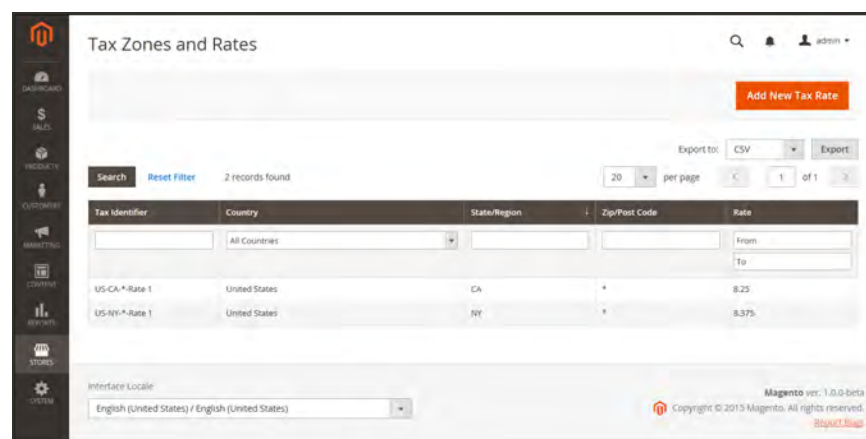
[European Commission Taxation and Customs Union](#)

[EU 1015 Place of Supply Changes](#)

Tax Zones and Rates

Tax rates generally apply to transactions that take place within a specific geographical area. The Tax Zones and Rates tool enables you to specify the tax rate for each geographical area from which you collect and remit taxes. Because each tax zone and rate has a unique identifier, you can have multiple tax rates for a given geographic area (such as places that do not tax food or medicine, but do tax other items).

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.
 - b. Enter the first ZIP or postal code in the range.
 - c. Enter the last ZIP or postal code in the range.
 - d. Choose the **State** where the tax rate applies.

- e. Choose the **Country** where the tax rate applies.
 - f. Enter the **Rate Percent** that is used for the tax rate calculation.
7. When complete, tap **Save Rate**.

The screenshot shows the 'New Tax Rate' form in the Magento Admin interface. The form is titled 'New Tax Rate' and has a search icon, a notification bell, and a user profile icon in the top right corner. The form fields are as follows:

- Tax Identifier:** A text input field.
- Zip/Post is Range:** A checkbox.
- Zip/Post Code:** A text input field with a tooltip that reads: '"*" - matches any; "xyz*" - matches any that begins on "xyz" and are not longer than 10.
- State:** A dropdown menu with 'California' selected.
- Country:** A dropdown menu with 'United States' selected.
- Rate Percent:** A text input field.

At the top right of the form, there are three buttons: 'Back', 'Reset', and 'Save Rate'.

New Tax Rate

To edit an existing tax rate:

1. On the Admin sidebar, tap **Stores**. Then under **Taxes**, choose **Tax Zones and Rates**.
2. Find the tax rate in the Tax Zones and Rates grid, and open the record in edit mode.
If there are many rates in the list, use the **filter controls** to find the rate you need.
3. Make the necessary changes to the **Tax Rate Information**.
4. Update the **Tax Titles** as needed.
5. When complete, tap **Save Rate**.

Import/Export Tax Rates

If you conduct business in several states and ship a large quantity of product, 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

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Code	Country	State	Zip/Post Code	Rate	Zip/Post is Range	Range From	Range To	english	french	german	spanish	
2	US-CA*-Rate 1	US	CA	*	8.25								
3	US-NY*-Rate 1	US	NY	*	8.375								
4	US-MI*-Rate 1	US	MI	*	8.25								
5													
6													

Exported Tax Rate Data

4. Open the new tax rate data in a second instance of the spreadsheet, so you can see both, side by side.

In the new tax rate data, take note of any additional tax rate data that you might need to set up in your store before the data is imported. For example, the tax rate data for California also includes:

- TaxRegionName
- CombinedRate
- StateRate
- CountyRate
- CityRate
- SpecialRate

If you need to import additional **tax zones and rates**, you must first define them from the Admin of your store, and update the **tax rules** as needed. Then, export the data, and open the file in OpenOffice Calc, so it can be used for reference. However, to keep this example simple, we will import only the standard tax rate columns.

Step 2: Prepare the Import Data

You now have two spreadsheets open, side by side. One with the Magento export file structure, and the other with the new tax rate data that you want to import.

1. To create a place to work in the spreadsheet with the new data, insert as many blank columns at the far left as needed. Then, use cut and paste to rearrange the columns so they match the order of the Magento export data.
2. Rename the column headers to match the Magento export data.
3. Delete any columns that have no data. Otherwise, the structure of the import file should match the original Magento export data.
4. Before saving the file, scroll down and make sure that the tax rate columns contain only numeric data. Any text found in a tax rate column will prevent the data from being imported.
5. Save the prepared data as a .CSV file. When prompted, verify that a comma is used as a **Field delimiter**, and double quotes as the **Text delimiter**. Then, tap **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.

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
MADERA	United States	CA	94976	0.065
FERNANDO	United States	CA	91341	0.065
SACRAMENTO	United States	CA	95799	0.065
AGOW	United States	CA	93662	0.01
AJBI	United States	CA	95077	0.01
AGSZ	United States	CA	92232	0.01
SHASTA	United States	CA	96067	0.065
MOON	United States	CA	94019	0.065
AVM	United States	CA	95330	0.01
AJBV	United States	CA	93258	0.01
AGBF	United States	CA	94557	0.01
US-CA*-Rate 1	United States	CA	*	0.25
COUNTY	United States	CA	96148	0.065
AGZM	United States	CA	95453	0.01
AGXM	United States	CA	93556	0.01

Imported Tax Rates

4. Run some test transactions in your store with customers from different ZIP codes to make sure that the new tax rates work correctly.

Value Added Tax (VAT)

Some countries charge a value added tax, or VAT, on goods and services. There can be different VAT rates depending on which stage you as a merchant are at in the manufacture or distribution of the products, materials, or services that you sell to your customers. In this case you may need to use more than one VAT rate in your store for tax calculation purposes.

Configuring VAT

The following instructions include a sample procedure to set up a 20% VAT in the U.K. for sales to retail customers. For other tax rates and countries, follow the general procedure but enter specific information that corresponds to your country, VAT rate, customer types, and so on.

Before proceeding, make sure to find out which rules and regulations apply to VAT in your area.

In certain business-to-business transactions, VAT is not assessed. Magento can validate a customer's VAT ID to ensure that VAT is assessed (or not assessed) properly. To learn more, see: VAT Validation.

Process Overview:

- Step 1: [Set Up Customer Tax Classes](#)
- Step 2: [Set Up Product Tax Classes](#)
- Step 3: [Set Up Tax Zones and Rates](#)
- Step 4: [Set Up Tax Rules](#)
- Step 5: [Apply Tax Classes to Products](#)

Step 1: Set Up Customer Tax Classes

1. On the Admin sidebar, tap **Stores**. Then choose, select **Tax Zones and Rates**.
2. Ensure that there is a customer tax class that is appropriate to use with the VAT. For this example, ensure that there is a customer tax class named Retail Customer. If Retail Customer does not exist, click the **Add New** button and add it.

Step 2: Set Up Product Tax Classes

1. On the Admin menu, select **Sales > Tax > Product Tax Classes**.
2. Click the **Add New** button and create three new classes:

- VAT Standard
 - VAT Reduced
 - VAT Zero
3. Click the **Save Class** button for each new class that you add.

Step 3: Set Up Tax Zones and Rates

1. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**.
For this example you can remove the U.S. tax rates, or leave them as they are.
2. Click the **Add New Tax Rate** button. Add new rates as follows:

NEW TAX RATE	SETTINGS	
VAT Standard	Tax Identifier:	VAT Standard
	Country and State:	United Kingdom
	Rate Percent:	20.00
VAT Reduced	Tax Identifier:	VAT Reduced
	Country and State:	United Kingdom
	Rate Percent:	5.00

3. Click the **Save Rate** button for each rate.

Step 4: Set Up Tax Rules

A tax rule is a combination of a customer tax class, a product tax class, and a tax rate.

1. On the Admin menu, select **Sales > Tax > Manage Tax Rules**.
2. Add new tax rules as follows:

NEW TAX RULE	SETTINGS	
VAT Standard	Name:	VAT Standard
	Customer Tax Class:	Retail Customer
	Product Tax Class:	VAT Standard
	Tax Rate:	VAT Standard Rate

NEW TAX RULE	SETTINGS
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 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.

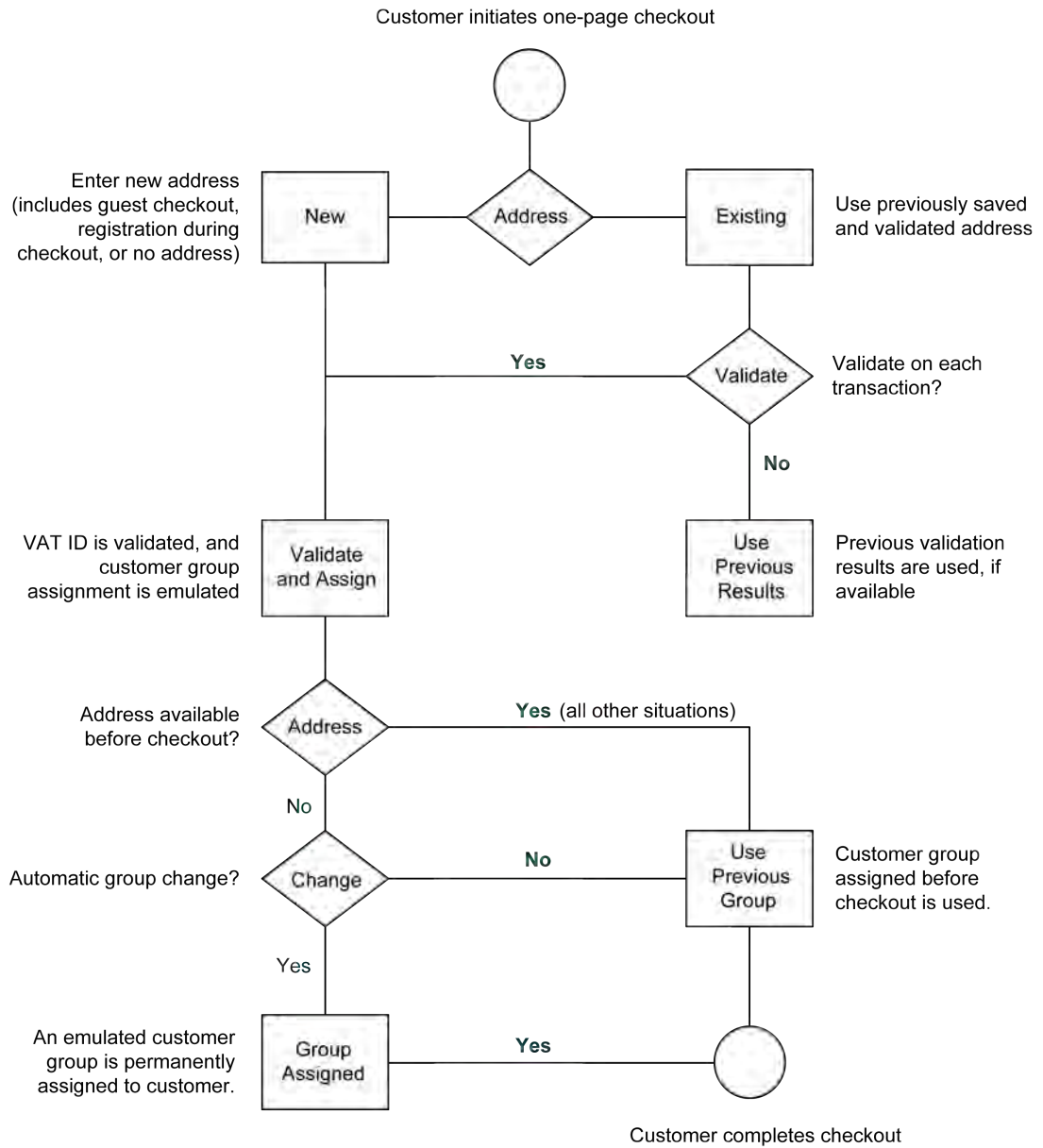
If enabled, you can override VAT ID Validation for individual customers by selecting the checkbox on the Customer Information page.

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

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.
Product Tax Class	A class for virtual products.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.

Process Overview:

Step 1: [Create VAT-Related Customer Groups](#)

Step 2: [Create VAT-Related Classes, Rates and Rules](#)

Step 3: [Enable and Configure VAT ID Validation](#)

Step 4: [Set your VAT ID and Location Country](#)

Step 5: [Verify the List of EU Member Countries](#)

Step 1: Create VAT-Related Customer Groups

VAT ID Validation automatically assigns one of the four default customer groups to customers according to VAT ID validation results:

- Domestic
- Intra-EU
- Invalid VAT ID
- Validation error

You can create new customer groups for VAT ID Validation or use existing groups, if they comply with your business logic. When configuring VAT ID Validation, you must assign each of the created customer groups as a default for customers with appropriate VAT ID validation results.

Step 2: Create VAT-Related Classes, Rates, and Rules

Each tax rule is defined by three entities:

- Customer Tax Classes
- Product Tax Classes
- Tax Rates

Create the **tax rules** that you need to use VAT ID Validation effectively.

- Tax rules include tax rates and **tax classes**.
- Tax classes are assigned to **customer groups**.

Step 3: Enable and Configure VAT ID Validation

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If necessary, set the **Store View** for the configuration.
3. In the panel on the left under **Customers**, choose **Customer Configuration**.

4. Expand  the **Create New Account Options** section.

Create New Account Options

Enable Automatic Assignment to Customer Group	No	[STORE VIEW]
Default Group	General	[STORE VIEW]
Default Value for Disable Automatic Group Changes Based on VAT ID	No	[GLOBAL]
Show VAT Number on Frontend	No	[WEBSITE]

▲ To show VAT number on frontend, set Show VAT Number on Frontend option to Yes.

Default Email Domain	example.com	[STORE VIEW]
Default Welcome Email	New Account (Default)	[STORE VIEW]
Email Sender	General Contact	[STORE VIEW]
Require Emails Confirmation	No	[WEBSITE]
Confirmation Link Email	New Account Confirmation Key (Default)	[STORE VIEW]
Welcome Email	New Account Confirmed (Default)	[STORE VIEW]


▲ This email will be sent instead of default welcome email, after account confirmation.

Generate Human-Friendly Customer ID	No	[GLOBAL]
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Create New Account Options

5. Set **Enable Automatic Assignment to Customer Group** to “Yes.” Then complete the following fields as needed.
- Default Group
 - Default Value for Disable Automatic Group Changes Based on VAT ID
 - Show VAT Number on Frontend
6. When complete, tap **Save Config.**

Step 4: Set Your VAT ID and Location Country

1. On the Admin sidebar, tap **Stores**. Under **Settings**, choose **Configuration**.
2. If needed, set **Store View** to the applicable store view.
3. In the panel on the left under **General**, choose **General**.
4. Expand  the **Store Information** section. Then, do the following:

Store Information ⌵

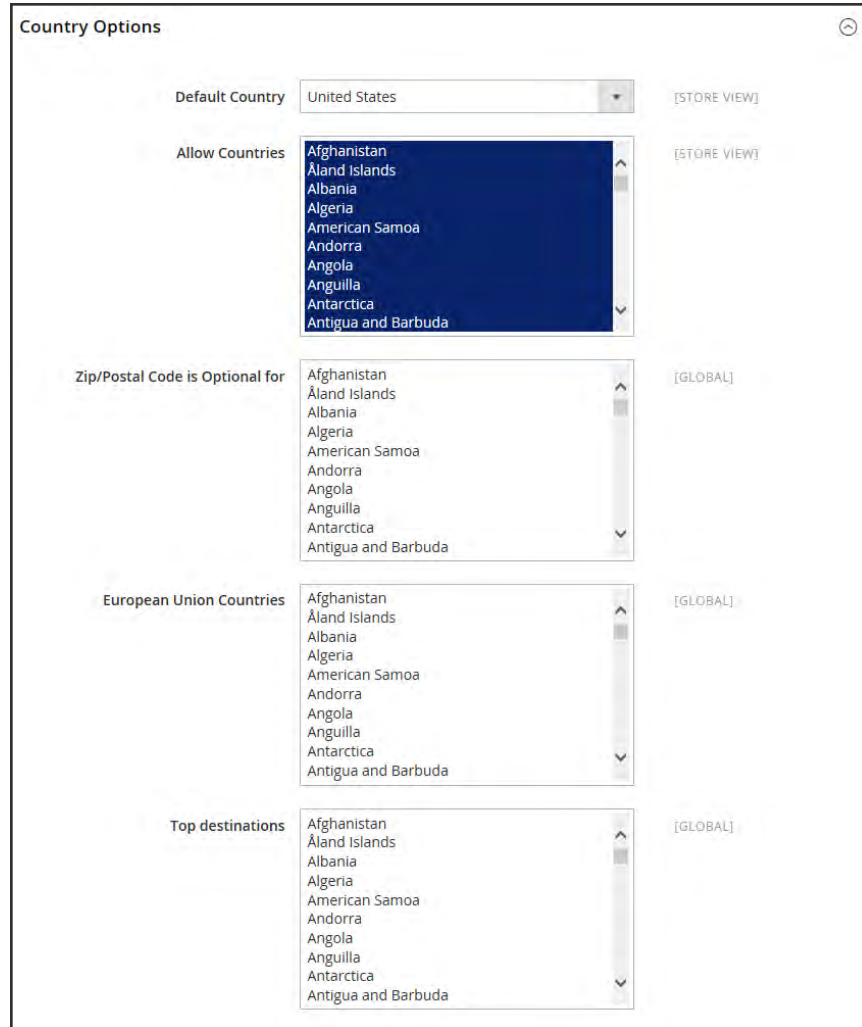
Store Name	<input type="text"/>	[STORE VIEW]
Store Phone Number	<input type="text"/>	[STORE VIEW]
Store Hours of Operation	<input type="text"/>	[STORE VIEW]
Country	<input type="text" value="--Please Select--"/>	[WEBSITE]
Region/State	<input type="text"/>	[WEBSITE]
ZIP/Postal Code	<input type="text"/>	[WEBSITE]
City	<input type="text"/>	[WEBSITE]
Street Address	<input type="text"/>	[WEBSITE]
Street Address Line 2	<input type="text"/>	[WEBSITE]
VAT Number	<input type="text"/>	[WEBSITE]

Store Information

- a. Select your **Country**.
 - b. Enter your **VAT Number**. Then, tap **Validate VAT Number**. The result appears immediately.
5. When complete, tap **Save Config**.

Step 5: Verify the List of EU Member Countries

1. Continuing in the General configuration section, expand  the **Countries Options** section.



Countries Options

2. In the list of **European Union Countries**, verify that each member country of the EU is selected.
3. When complete, tap **Save Config.**

Tax Quick Reference

Some tax settings have a choice of options that determines the way the tax is calculated and presented to the customer. To learn more, see: [International Tax Guidelines](#).

Tax Calculation Methods

Tax calculation method options include Unit Price, Row Total, and Total. The following table explains how rounding (to two digits) is handled for different settings.

Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Unit Price	Magento calculates the tax for each item and displays prices tax-inclusive. To calculate the tax total, Magento rounds the tax for each item, and then adds them together.
Row Total	Magento calculates the tax for each line. To calculate the tax total, Magento rounds the tax for each line item and then adds them together.
Total	Magento calculates the tax for each item and adds those tax values to calculate the total unrounded tax amount for the order. Magento then applies the specified rounding mode to the total tax to determine the total tax for the order.

Catalog Prices With or Without Tax

The possible display fields vary depending on the calculation method and whether the catalog prices include or exclude taxes. Display fields have two-decimal precision in normal computations. Some combinations of price settings display prices that both include and exclude tax. When both appear on the same line item, it can be confusing to customers, and triggers a [warning](#).

Tax Configuration Options

SETTING	CALCULATION AND DISPLAY
Excluding Tax	Using this setting, the base item price is used as it is entered and the tax calculation methods are applied.
IncludingTax	Using this setting, the base item price excluding tax is calculated first. This value is used as the base price, and the tax calculation methods are applied.

Important! Changes have been made from earlier versions for EU merchants or other VAT merchants who display prices including tax and operate in several countries with multiple store views. If you load prices with more than two digits of precision, Magento automatically rounds all prices to two digits to ensure that a consistent price is presented to buyers.

Shipping Prices With or Without Tax

Tax Configuration Options

SETTING	DISPLAY	CALCULATION
Excluding Tax	Appears without tax.	Normal calculation. Shipping is added to cart total, typically displayed as a separate item.
Including Tax	Can be tax inclusive, or tax can be displayed separately.	Shipping is treated as another item in cart with taxes, using the same calculations.

Tax Amounts as Line Items

To display two different tax amounts as separate line items, such as GST and PST for Canadian stores, you must set different priorities for the related tax rules. However, in previous tax calculations, taxes with different priorities would automatically be compounded. To correctly display separate tax amounts without an incorrect compounding of the tax amounts, you can set different priorities, and also select the Calculate off subtotal only checkbox. This produces correctly calculated tax amounts that appear as separate line items.

International Tax Guidelines

U.S. Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	No, because FPT is not taxed.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	No
Apply Discount	Before tax
Comment	All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.

UK B2C Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For merchants marking up supplier invoices (including VAT).

U.K. B2B Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description

U.K. B2B Tax Configuration (cont.)

TAX OPTION	RECOMMENDED SETTING
Tax based on	Shipping address
Tax Calculation	On item
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For B2B merchants to provide simpler VAT supply chain considerations. Tax calculation on row is also valid; however, check with your taxing jurisdiction. Setup assumes a merchant is in the supply chain and that goods sold are used by other vendors for VAT rebates and so on. This makes it easy to discern tax by item for faster rebate generation. Note that some jurisdictions require different rounding strategies not currently supported by Magento, and that not all jurisdictions allow item or row level tax.

Canada Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT, description, and apply tax to FPT.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax
Comment	<p>Merchants located in a GST/PST province (Montreal) should create one tax rule and show a combined tax amount.</p> <p>Be sure to consult a qualified tax authority if you have any questions. For information about the tax requirements of specific provinces, see the following:</p> <p>Revenu Québec</p> <p>Government of Saskatchewan</p> <p>Manitoba Information for Vendors</p>

U.S. Tax Guidelines

Tax Classes

TAX CLASS	RECOMMENDED SETTING
Tax Class for Shipping	None

Calculation Settings

CALCULATION	RECOMMENDED SETTING
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Origin
Catalog Prices	Excluding Tax
Shipping Prices	Excluding Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Excluding Tax

Default Tax Destination Calculation

SETTING	RECOMMENDED SETTING
Default Country	United States
Default State	State where business is located.
Default Post Code	The postal code that is used in your tax zones.

Price Display Settings

SETTING	RECOMMENDED SETTING
Display Product Prices in Catalog	Excluding Tax
Display Shipping Prices	Excluding Tax

Shopping Cart Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Display Gift Wrapping Prices	Excluding Tax
Display Printed Card Prices	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

Orders, Invoices, Credit Memos, Display Settings

SETTING	RECOMMENDED SETTING
Display Prices	Excluding Tax
Display Subtotal	Excluding Tax
Display Shipping Amount	Excluding Tax
Include Tax in Grand Total	Yes
Display Full Tax Summary	Yes
Display Zero Tax Subtotal	Yes

Fixed Product Taxes

SETTING	RECOMMENDED SETTING
Enable FPT	No, except in California.

Canadian Tax Guidelines

The following example shows how to set up GST tax rates for Canada and PST tax rates for Saskatchewan, with tax rules that calculate and display the two tax rates. Because this is an example configuration, be sure to verify the correct tax rates and rules for your tax jurisdictions. When setting up taxes, set the store scope to apply the configuration to all applicable stores and websites.

- Fixed product tax is included for relevant goods as a product attribute.
- In Quebec, PST is referred to as TVQ. If you need to set up a rate for Quebec, make sure to use TVQ as the identifier.

Process Overview:

Step 1: [Complete the Tax Calculation Settings](#)

Step 2: [Set Up Canadian Goods & Services Tax \(GST\)](#)

Step 3: [Set Up Canadian Provincial Sales Tax \(PST\)](#)

Step 4: [Create a GST Tax Rule](#)

Step 5: [Create a PST Tax Rule for Saskatchewan](#)

Step 6: [Save and Test the Results](#)

Step 1: Complete Tax Calculation Settings

1. On the Admin 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

Tax Rule Information (cont.)

FIELD	RECOMMENDED SETTING
Calculate off subtotal only	Select this checkbox.
Sort Order	0

Step 6: Save and Test the Results

1. When complete, click the **Save Config** button.
2. Return to your storefront, and create a sample order to test the results.

EU Tax Guidelines

The following example depicts a store based in France that sells > 100k Euros in France and > 100k Euros in Germany.

- Tax calculations are managed at the website level.
- Currency conversion and tax display options are controlled individually at the store view level, (Click the Use Website checkbox to override the default).
- By setting the default tax country you can dynamically show the correct tax for the jurisdiction.
- Fixed product tax is included for relevant goods as a product attribute.
- It might be necessary to edit the catalog to ensure that it shows up in the correct category/website/store view.

Process Overview:

Step 1: [Create Three Product Tax Classes](#)

Step 2: [Create Tax Rates for France and Germany](#)

Step 3: [Set Up the Tax Rules](#)

Step 4: [Set Up a Store View for Germany](#)

Step 5: [Configure Tax Settings for France](#)

Step 6: [Configure Tax Settings for Germany](#)

Step 1: Create Three Product Tax Classes

For this example, it is assumed that multiple VAT-Reduced product tax classes are not needed.

1. Create a VAT-Standard product tax class.
2. Create a VAT-Reduced product tax class.
3. Create a VAT-Free product tax class.

Step 2: Create Tax Rates for France and Germany

Create the following tax rates:

Tax Rates

TAX RATE	SETTING	
France-StandardVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	20%
France-ReducedVAT	Country:	France
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	5%
Germany-StandardVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	19%
Germany-ReducedVAT	Country:	Germany
	State/Region:	*
	ZIP/Postal Code:	*
	Rate:	7%



Step 3: Set Up the Tax Rules

Create the following tax rules:

Tax Rules

TAX RULE	SETTING
Retail-France-StandardVAT	Customer Class: Retail Customer
	Tax Class: VAT-Standard
	Tax Rate: France-StandardVAT
	Priority: 0
	Sort Order: 0
Retail-France-ReducedVAT	Customer Class: Retail Customer
	Tax Class: VAT Reduced
	Tax Rate: France-ReducedVAT
	Priority: 0
	Sort Order: 0
Retail-Germany-StandardVAT	Customer Class: Retail Customer
	Tax Class: VAT-Standard
	Tax Rate: Germany-StandardVAT
	Priority: 0
	Sort Order: 0
Retail-Germany-ReducedVAT	Customer Class: Retail Customer
	Tax Class: VAT-Reduced
	Tax Rate: Germany-ReducedVAT
	Priority: 0
	Sort Order: 0

Step 4: Set Up a Store View for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **All Stores**.
2. Under the default website, create a store view for **Germany**. Then, do the following:
 - a. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
 - a. In the upper-left corner, set **Default Config** to the French store.
 - b. On the General page, expand  the **Countries Options** section, and set the default country to “France.”
 - c. Complete the locale options as needed.
3. In the upper-left corner, choose the German **Store View**. Then, do the following:
 - a. On the General page, expand  **Countries Options**, and set the default country to “Germany.”
 - b. Complete the locale options as needed.

Step 5: Configure Tax Settings for France

Complete the following General tax settings:

General Settings

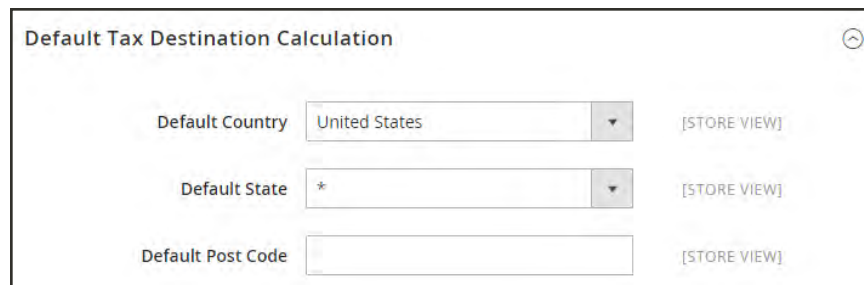
FIELD	RECOMMENDED SETTING
Tax Class for Shipping	Shipping (shipping is taxed)
Tax Calculation Method Based On	Total
Tax Calculation Based On	Shipping Address
Catalog Prices	Including Tax
Shipping Prices	Including Tax
Apply Customer Tax	After Discount
Apply Discount on Prices	Including Tax
Apply Tax On	Custom Price (if available)
Default Country	France

General Settings (cont.)

FIELD	RECOMMENDED SETTING
Default State	
Default Postal Code	* (asterisk)
Include Tax in Grand Total	Yes
Enable FPT	Yes
All FPT Display Settings	Including FPT and FPT description
Apply Discounts to FPT	No
Apply Tax to FPT	Yes
Include FPT in Subtotal	Yes

Step 6: Configure Tax Settings for Germany

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Sales**, choose **Tax**. Then, do the following:
 - a. In the upper-right corner, choose the German **Store View**.
 - b. To the right of the Default Country field, clear the **Use Website** checkbox. Then, set **Default Country** to “Germany.”
 - c. To the right of the Default State field, clear the **Use Website** checkbox. Then, set **Default State** to “*.”
 - d. To the right of the Default Post Code field, mark the **Use Website** checkbox. Then, set **Default Post Code** to “*.”
3. When complete, tap **Save Config.**





The screenshot shows a configuration panel titled "Default Tax Destination Calculation" with a close button in the top right corner. It contains three rows of settings, each with a label, a text input field, and a "[STORE VIEW]" link to the right. The first row is "Default Country" with a dropdown menu showing "United States". The second row is "Default State" with a dropdown menu showing "*". The third row is "Default Post Code" with an empty text input field.

Default Tax Destination Calculation

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

Tax Included (cont.)

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Including and Excluding tax	OK	Warning	Warning

Calculation Settings ⌵

Tax Calculation Method Based On [WEBSITE]

Tax Calculation Based On [WEBSITE]

Catalog Prices [WEBSITE]
This sets whether catalog prices entered from Magento Admin include tax.

Shipping Prices [WEBSITE]
This sets whether shipping amounts entered from Magento Admin or obtained from gateways include tax.

Apply Customer Tax [WEBSITE]

Apply Discount On Prices [WEBSITE]
Apply discount on price including tax is calculated based on store tax if "Apply Tax after Discount" is selected.

Apply Tax On [WEBSITE]

Enable Cross Border Trade [WEBSITE]
When catalog price includes tax, enable this setting to fix the price no matter what the customer's tax rate.

Calculation Settings

Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

Recommended Settings

FIELD	RECOMMENDED SETTING	
Apply Customer Tax	After Discount	
Apply Discount on Prices	US and Canada	Excluding Tax
	EU	Including Tax



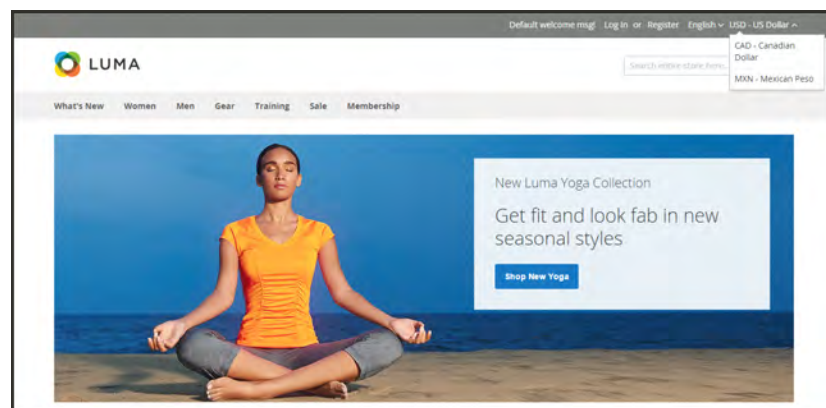
CHAPTER 66:

Currency

Magento Community Edition 2.0 gives you the ability to accept currencies from more than two hundred countries around the world. If the store supports multiple currencies, a Currency Chooser appears in the header after currency rates are **updated**.

If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can impact your profit margin.

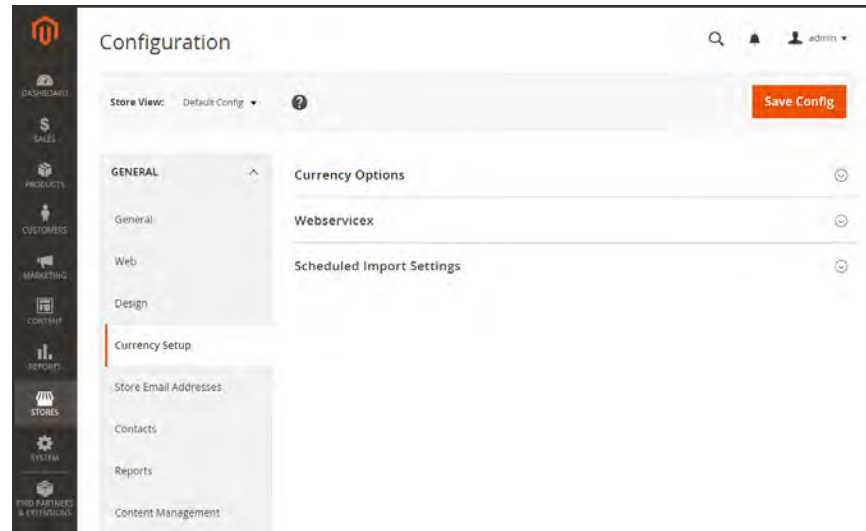
Currency symbols appear in product prices and sales documents such as orders and invoices. You can customize the currency symbols as needed, and also set the display of the price separately for each store or view.



Currency Chooser

Currency Configuration

Before setting up individual currency rates, first specify which currencies you accept, and the currency that you want to use to display prices in your store.



Currency Setup

Process Overview:

- Step 1: [Choose the Accepted Currencies](#)
- Step 2: [Configure the Import Connection](#)
- Step 3: [Configure the Scheduled Import Settings](#)
- Step 4: [Update the Currency Rates](#)

Step 1: Choose the Accepted Currencies

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Currency Setup**.
3. Expand ☺ the **Currency Options** section, and do the following:
 - a. Set **Base Currency** to the primary currency that you use for online transactions.
 - b. Set **Default Display Currency** to the currency that you use to display pricing in your store.
 - c. In the **Allowed Currencies** list, select all currencies that you accept as payment in your store. Make sure to also select your primary currency. (For multiple currencies, hold down the Ctrl key and select each option.)

Currency Options

4. When prompted to refresh the cache, tap the **Close** ✕ box in the upper-right corner of the system message. We'll refresh the cache later.
5. To define the scope of the base currency, do the following:
 - a. In the panel on the left under **Catalog**, choose **Catalog**. Then, scroll down and expand ☺ the **Price** section.
 - b. Set **Catalog Price Scope** to either "Global" or "Website."

Price

Step 2: Configure the Import Connection

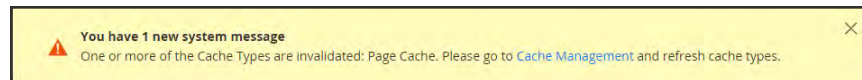
1. Scroll back up to the top of the page. In the panel on the left under **General**, choose **Currency Setup**.
2. Expand ☺ the **WebserviceX** section.
3. In the **Connection Timeout in Seconds** field, enter the number of seconds of inactivity to allow before the connection times out.

WebserviceX

Step 3: Configure the Scheduled Import Settings

1. Continuing with Currency Setup, expand ☺ the **Scheduled Import Settings** section.
2. To automatically update currency rates, set **Enabled** to "Yes." Then, do the following:
 - a. Set **Service** to the rate provider. The default value is "WebserviceX."
 - b. Set **Start Time** to the hour, minute, and second that the rates will be updated according to the schedule.
 - c. To determine how often the rates are updated, set **Frequency** to one of the following:
 - Daily
 - Weekly
 - Monthly
 - d. In the **Error Email Recipient** field, enter the email address of the person who is to receive email notification if an error occurs during the import process. To enter multiple email addresses, separate each with a comma.

- e. Set **Error Email Sender** to the **store contact** that appears as the sender of the error notification.
 - f. Set **Error Email Template** to the email template used for the error notification.
3. When complete, tap **Save Config**.
 4. When prompted to update the cache, tap the **Cache Management** link. Then, refresh the invalid cache.



Refresh Cache

Scheduled Import Settings

Enabled	No	[STORE VIEW]
Service	Webservices	[STORE VIEW]
Start Time	00 : 00 : 00	[STORE VIEW]
Frequency	Daily	[STORE VIEW]
Error Email Recipient		[STORE VIEW]
Error Email Sender	General Contact	[WEBSITE]
Error Email Template	Currency Update Warnings (Default)	[WEBSITE]

Email template chosen based on theme fallback when "Default" option is selected.

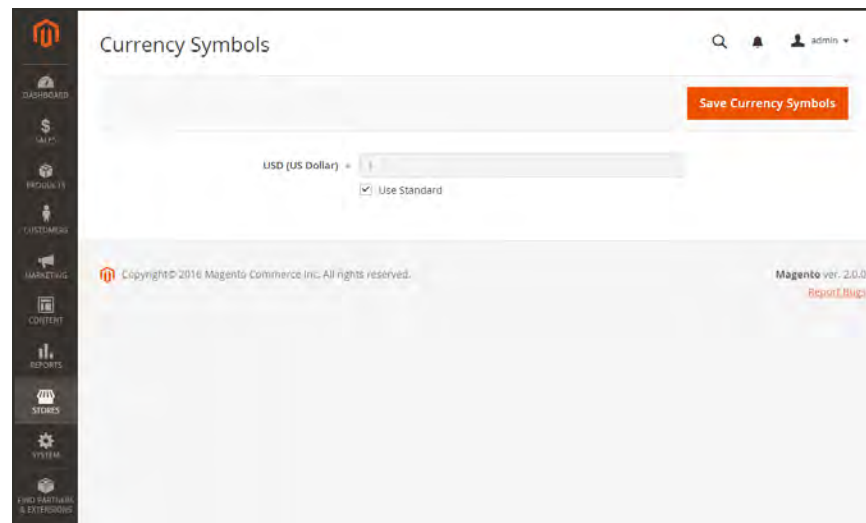
Scheduled Import Settings

Step 4: Update the Currency Rates

The currency rates must be updated with the current values before they go into effect. Follow the instructions to **update the rates** manually or to import the rates automatically.

Currency Symbols

Manage Currency Symbols gives you the ability to customize the symbol associated with each currency that is accepted as payment in your store.



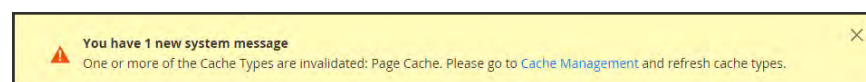
Currency Symbols

To customize currency symbols:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Symbols**.
Each currency that is currently enabled for your store appears in the Currency list.
2. Enter a custom symbol for each currency you want to use, or mark the **Use Standard** checkbox to the right of each currency.
3. To override the default symbol, clear the **Use Standard** checkbox. Then, enter the symbol that you want to use.

It is not possible to change the alignment of the currency symbol from left to right.

4. When complete, tap **Save Currency Symbols**.
5. When prompted to update the cache, tap the **Cache Management** link. Then, refresh any invalid cache.

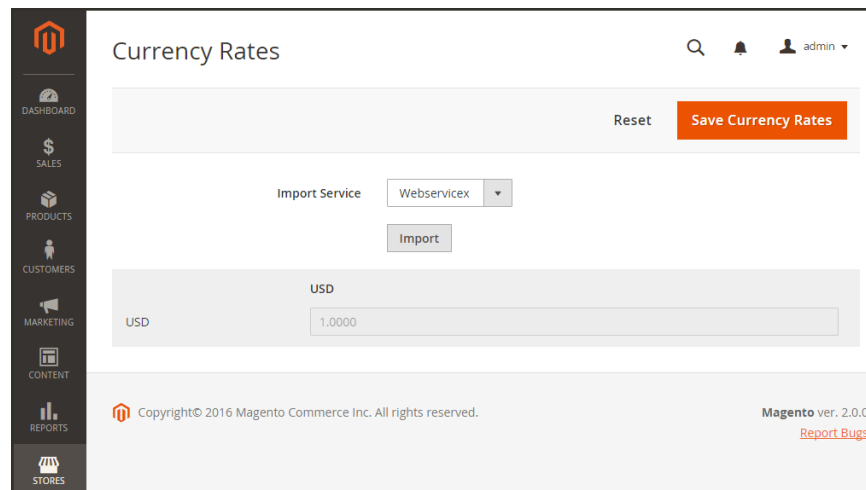


Refresh Cache

Updating Currency Rates

Currency rates can be set manually, or imported into the store. To ensure that your store has the most current rates, you can configure the currency rates to be updated automatically on schedule.

Before importing currency rates, complete the [Currency Rate Setup](#) to specify the currencies that you accept, and to establish the import connection and schedule.



Updating Currency Rates

To manually update a currency rate:

1. On the Admin sidebar, click **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Tap the rate you want to change, and enter the new value for each currency supported.
3. When complete, tap **Save Currency Rates**.

To import currency rates:

1. On the Admin sidebar, tap **Stores**. Then under **Currency**, choose **Currency Rates**.
2. Set **Import Service** to the currency rate provider. WebserviceX is the default provider.
3. Tap **Import**.

The updated rates appear in the Currency Rates list. If the rates have changed since the last update, the old rate appears below for reference.

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

- When prompted to update the cache, tap the **Cache Management** link. Then, refresh all invalid caches.

Cache Management

Flush Cache Storage **Flush Magento Cache**

Refresh Submit 13 records found (4 selected)

Cache Type	Description	Tags	Status
<input checked="" type="checkbox"/>	Configuration	CONRIG	INVALIDATED
<input checked="" type="checkbox"/>	Layouts	LAYOUT_GENERAL_CACHE_TAG	INVALIDATED
<input checked="" type="checkbox"/>	Blocks HTML output	BLOCK_HTML	INVALIDATED
<input type="checkbox"/>	View files fallback	VIEW_FILES_FALLBACK	ENABLED
<input type="checkbox"/>	View files pre-processing	VIEW_FILES_PREPROCESSING	ENABLED
<input type="checkbox"/>	Collections Data	COLLECTION_DATA	ENABLED
<input type="checkbox"/>	Database DDL operations	DB_DDL	ENABLED
<input type="checkbox"/>	EAV types and attributes	EAV	ENABLED
<input checked="" type="checkbox"/>	Page Cache	PPC	INVALIDATED
<input type="checkbox"/>	Translations	TRANSLATE	ENABLED
<input type="checkbox"/>	Integrations Configuration	INTEGRATION	ENABLED
<input type="checkbox"/>	Integrations API Configuration	INTEGRATION_API_CONFIG	ENABLED
<input type="checkbox"/>	Web Services Configuration	WSERVICE	ENABLED

Refresh Invalid Caches

To import currency rates on schedule:

- Make sure that **Cron** is enabled for your store.
- Complete the **Currency Rate Setup** to specify the currencies that you accept, and to establish the import connection and schedule.
- 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 67:

Attributes

Magento uses attributes to manage the information associated with products, customers, and product ratings. Attributes are pieces of information that might appear as fields in forms, reports, product reviews, [layered navigation](#), and email messages. Some attributes are built into the system, and others can be created to address specific needs.

You can find more information about attributes in the [Products](#) and [Data Transfer](#) sections of this guide. To learn more, see:

- [Using Product Attributes](#)
- [Product Attribute Reference](#)
- [Customer Attribute Reference](#)

Product Attributes

Product attribute properties determine how an attribute can be used in the catalog, its appearance and behavior in the store, and in data transfer operations. The properties and labels associated with each attribute determine how it can be used, and its presentation in the store.

Properties	The Properties section includes both basic and advanced attribute properties.
Labels	The label identifies an attribute in the Admin and also in the storefront of each store view. If your store is available in multiple languages, you can enter a different translated label for each language.
Storefront Properties	The Storefront Properties determine how an attribute can be used in your store, its appearance, and behavior. You can specify if attributes are available for search, layered navigation, product comparisons, price rules, and sorting. For text attributes, you can enable the WYSIWYG editor, and determine if HTML tags can be used to format the values.

To learn how to use attributes while creating a product, see: [Using Product Attributes](#).

Attribute Code	Default label	Required	System	Visible	Scope	Searchable	Use in Layered Navigation	Comparable
activity	Activity	No	No	Yes	Global	No	Filterable (with results)	Yes
category_gear	Category Gear	No	No	Yes	Global	No	Filterable (with results)	No
category_ids	Categories	No	Yes	No	Global	No	No	No
climate	Climate	No	No	Yes	Global	No	Filterable (with results)	No
collar	Collar	No	No	Yes	Global	No	Filterable (with results)	No
color	Color	No	No	No	Global	No	Filterable (with results)	No
cost	Cost	No	No	No	Web Site	No	No	No
country_of_manufacture	Country of Manufacture	No	Yes	No	Web Site	No	No	No
custom_design	Custom Design	No	Yes	No	Store View	No	No	No
custom_design_from	Active From	No	Yes	No	Store View	No	No	No

Product Attributes Page

Properties

Property Descriptions

PROPERTY	DESCRIPTION
----------	-------------

ATTRIBUTE PROPERTIES

Default Label	The label that identifies the attribute during data entry.
Catalog Input Type for Store Owner	<p>Determines the data type and input control that is used to manage the product from the store Admin. Options include:</p> <p>Text Field A single line input field for text.</p> <p>Text Area A multiple-line input field that can display paragraphs of text formatted with HTML.</p> <p>Date An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.</p> <p>Yes/No A drop-down list with predefined options of “Yes” and “No.”</p> <p>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.</p> <p>Dropdown A drop-down list of options that allows only one selection.</p> <p>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.</p> <p>Media Image An additional image that can be included in the attribute set of a product.</p> <p>Visual Swatch</p>

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	Text Swatch
	Fixed Product Tax An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Values Required	To require that a value to be entered in this field before the record can be saved, set Values Required to “Yes.” Options include: Yes / No

ADVANCED ATTRIBUTE PROPERTIES

Attribute Code	(Required) A unique identifier for internal use. The Attribute Code must begin with a letter, but can include a combination of lowercase letters (a-z) and numbers (0-9). The code must be less than thirty characters in length and cannot include any special characters or spaces, although an underscore (_) can be used to indicate a space.
Scope	Limits the use of an attribute to a specific store view or website. Options include: Store View Website Global
Default Value	Assigns a starting value to the attribute to help during data entry. To assign a default value for Multiple Select or Dropdown input types, see: Creating Attributes . <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.</div>
Unique Value	To prevent duplicate values in a data entry field, set Unique Value to “Yes.” Options include: Yes / No
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options: None Decimal Number

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	Integer Number
	Email
	URL
	Letters
	Letters (a-z, A-Z) or Numbers (0-9)
Add to Column Options	Determines if the column appears in the product grid. Options: Yes / No
Use in Filter Options	Determines if the attribute is used as a filter control at the top of columns in the grid. Options: Yes / No

Storefront Properties

Property Descriptions

PROPERTY	DESCRIPTION
Use in Search	<p>Select “Yes” if you want people to be able to search the catalog based on the value of this attribute. Options include: Yes / No</p> <p>The following attributes appear when Search is enabled:</p> <p>Search Weight To weight the search results, set Search Weight to a number from 1 to 5.</p> <p>Visible in Advanced Search Gives shoppers the ability to enter search criteria through a form. Options include: Yes / No</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Using too many attributes can slow down search. </div>
Comparable on Storefront	Select “Yes” to include this attribute as a row in the Compare Products report. Options include: Yes / No
Use In Layered Navigation	(Dropdown, Multiple Select and Price input types only) Includes the attribute as a filter in the “Shop By” section of layered navigation. Options include:

Property Descriptions (cont.)

PROPERTY	DESCRIPTION
	No The attribute is not used in layered navigation.
	Filterable (with results) Lists only products that match the filter value.
	Filterable (no results) Lists all attribute values, even those that do not apply to any product in the list. Layered navigation appears on a category page only if there are filterable attributes available.
Use In Search Results Layered Navigation	To include the attribute in the layered navigation for search results, select "Yes." Options include: Yes / No
Position	Determines the position of the attribute in layered navigation in relation to other filterable attributes.
Use for Promo Rule Conditions	To make the attribute available for use in price rules, select "Yes." Options include: Yes / No
Allow HTML Tags on Storefront	(Text Field and Text Area input types only) To be able to format the attribute value with HTML tags, select "Yes." Options include: Yes / No
Visible on Catalog Pages on Storefront	(Simple and virtual products only) To include the attribute on the Additional Information tab of the product page, select "Yes." Options include: Yes / No
Used in Product Listing	Depends on the theme. To include the attribute in product summaries that appear in catalog listings, select "Yes."
Used for Sorting in Product Listing	Depending on theme, includes the attribute as a "Sort By" option for catalog listings. Options: Yes / No

Creating a Product Attribute

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.

The screenshot shows the 'New Product Attribute' form in the Magento 2 admin interface. The form is titled 'New Product Attribute' and has a search bar, a user profile 'admin', and navigation buttons: 'Back', 'Reset', 'Save and Continue Edit', and 'Save Attribute'. The form is divided into two main sections: 'ATTRIBUTE INFORMATION' and 'Attribute Properties'. Under 'ATTRIBUTE INFORMATION', there are sub-sections for 'Properties', 'Manage Labels', and 'Frontend Properties'. The 'Attribute Properties' section includes: 'Attribute Label' (text input), 'Catalog Input Type for Store Owner' (dropdown menu set to 'Text Field'), 'Values Required' (dropdown menu set to 'No'), 'Advanced Attribute Properties' (expanded), 'Attribute Code' (text input with a note: 'For internal use. Must be unique with no spaces. Maximum length of attribute code must be less than 30 symbols'), 'Scope' (dropdown menu set to 'Store View' with a note: 'Declare attribute value saving scope'), 'Default Value' (text input), 'Unique Value' (dropdown menu set to 'No' with a note: 'Not shared with other products'), and 'Input Validation for Store Owner' (dropdown menu set to 'None'). A sidebar on the left contains navigation icons for Dashboard, Sales, Products, Customers, Marketing, Analytics, Reports, Stores, and System.

New Attribute Properties

Process Overview:

- Step 1: [Describe the Basic Properties](#)
- Step 2: [Describe the Advanced Properties](#)
- Step 3: [Enter the Field Label](#)
- Step 4: [Describe the Storefront Properties](#)

Step 1: Describe the Basic Properties

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

Attribute Properties

3. Under Attribute Properties, enter a **Default Label** to identify the attribute.
4. Set **Catalog Input Type for Store Owner** to the type in input control to be used for data entry.
5. For Dropdown and Multiple Select input types, do the following:
 - a. Under **Manage Options**, tap **Add Option**.
 - b. Enter the first value that you want to appear in the list. You can enter one value for the Admin, and a translation of the value for each store view. If you have only one store view, you can enter only the Admin value and it will be used for the storefront as well.
 - c. Tap **Add Option** and repeat the previous step for each option that you want to include in the list.
 - d. Select **Is Default** to use the option as the default value.
6. If you want to require the customer to choose an option before the product can be purchased, set **Values Required** to “Yes.”

Is Default	Default Store View	Admin	
<input checked="" type="radio"/>	Vanilla	Vanilla	Delete
<input type="radio"/>	Chocolate	Chocolate	Delete
<input type="radio"/>	Strawberry	Strawberry	Delete

Add Option

Manage Options

Step 2: Describe the Advanced Properties (if needed)

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

Advanced Attribute Properties

Attribute Code: ✕
This is used internally. Make sure you don't use spaces or more than 30 symbols.

Scope: ▼
Declare attribute value saving scope

Unique Value: ▼
Not shared with other products

Input Validation for Store Owner: ▼

Add to Column Options: ▼
Select "Yes" to add this attribute to the list of column options in the product grid.

Use in Filter Options: ▼
Select "Yes" to add this attribute to the list of filter options in the product grid.

Advanced Attribute Properties

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

Input Validation for Store Owner

- None
- None
- Decimal Number
- Integer Number
- Email
- URL
- Letters
- Letters (a-z, A-Z) or Numbers (0-9)

Input Validation

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.”

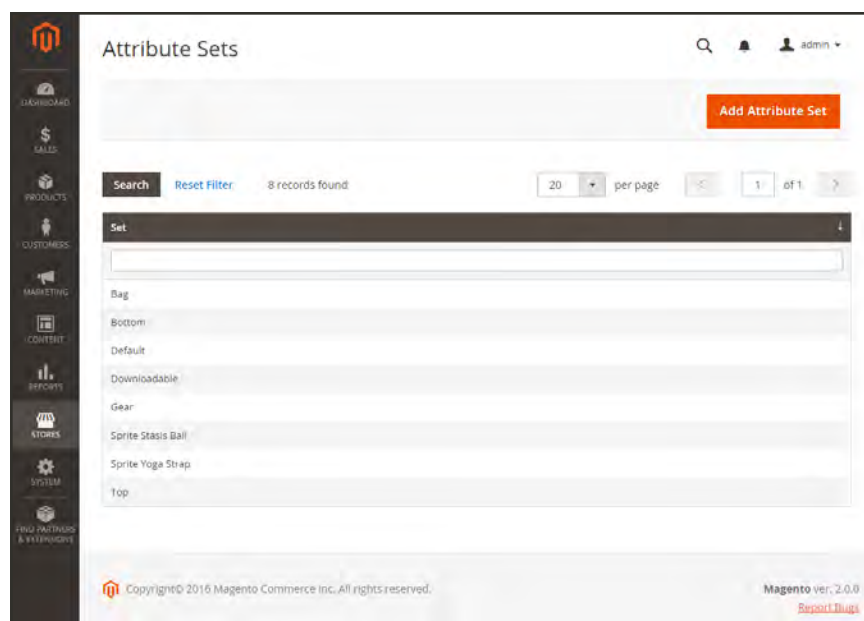
- 8. When complete, tap **Save Attribute**.

Storefront Properties

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.

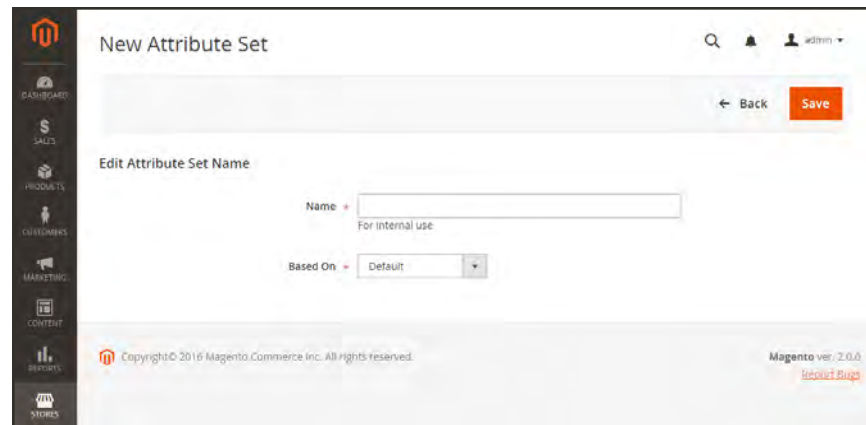
The attributes are organized into groups that determine where they appear in the product record. Your store comes with an initial attribute set called “default” which includes a set of commonly-used attributes. If you would like to add only a small number of attributes, you can add them to the default 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:

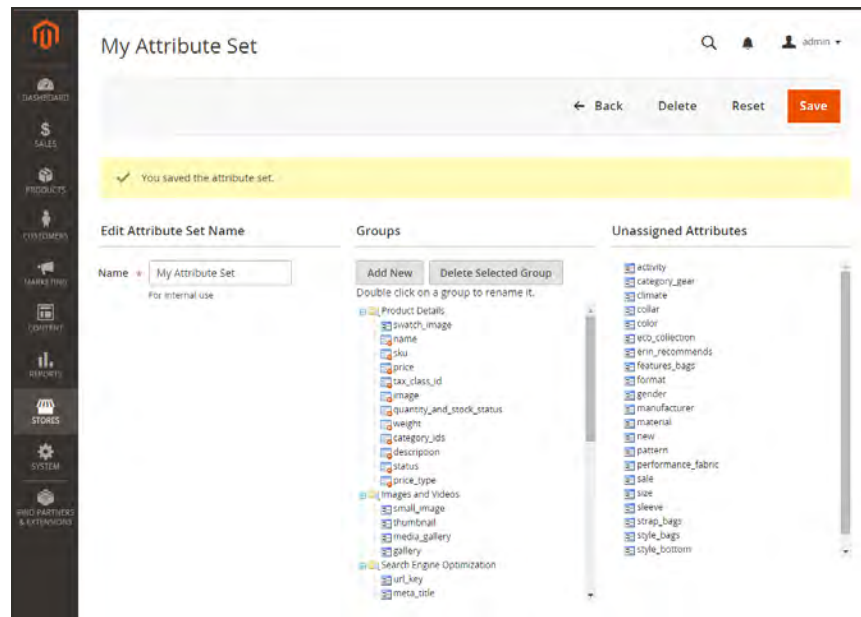


Edit Set Name

- 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.

System

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.

Contents

Data Transfer

- Working with CSV Files
- Import
- Export
- Product Attribute Reference
- Customer Attribute Reference

Integrations

- Magento Marketplace
- Magento Connect

Tools

- Cache Management
 - Full Page Cache
- Alternate Media Storage
 - Using a Database
 - Using a CDN
- Backups
- Index Management
 - Indexing Modes
- Web Setup Wizard

Permissions

- Adding Users
 - Locked Users
- User Roles

Security

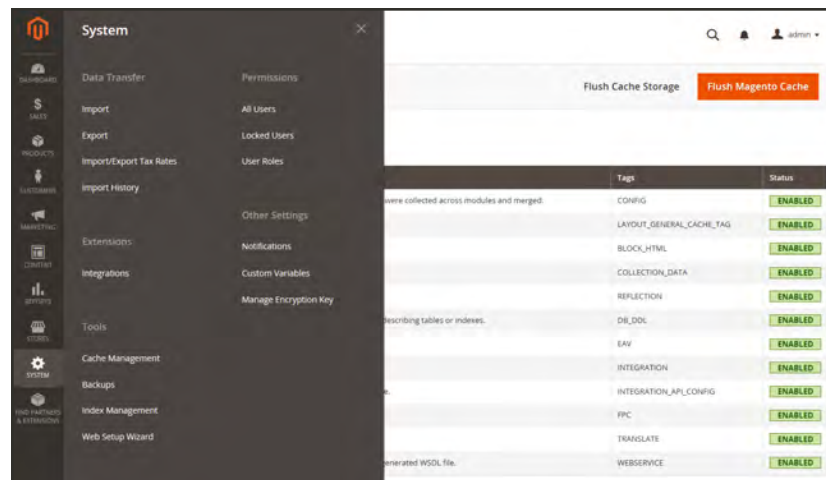
- Security Best Practices
- Admin Security
- CAPTCHA
- Encryption Key
- Session Validation
- Browser Capabilities Detection
- Action Log



CHAPTER 68:

System Menu

The System Menu includes tools to import and export data, install extensions, manage system caches and indexes, manage permissions, backups, system notifications, and custom variables.



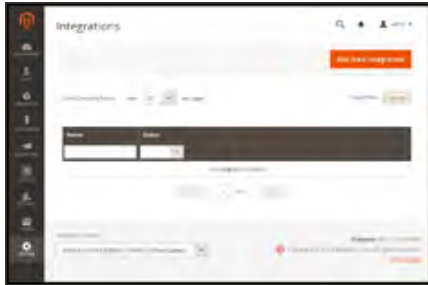
System Menu

Menu Options



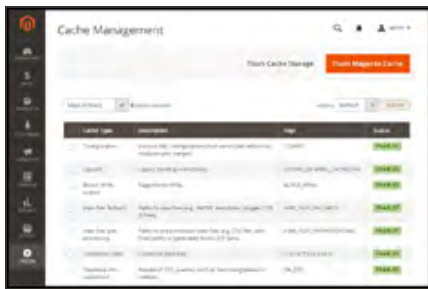
Data Transfer

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

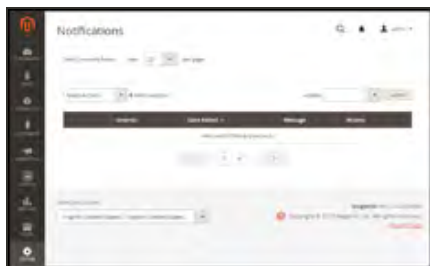
Manage your system resources, including cache and index management, backups, and installation settings.



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.

Other Settings



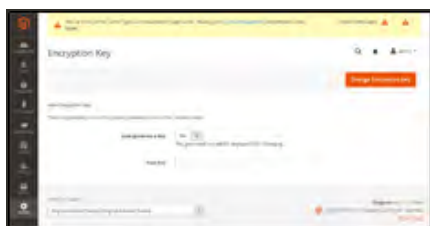
Notifications

Your store has an inbox for the messages received from Magento. The messages are rated by importance, and might refer to system updates, patches, new releases, scheduled maintenance, upcoming events, and more.



Custom Variables

If you know a little basic HTML, you can create custom variables and use a **markup tag** to incorporate them into pages, blocks, banners, and email templates.



Manage Encryption Key

The encryption key is used to protect passwords and other sensitive data. Magento can autogenerate an encryption key, or you can use one from another source.



CHAPTER 69:

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](#)
- [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

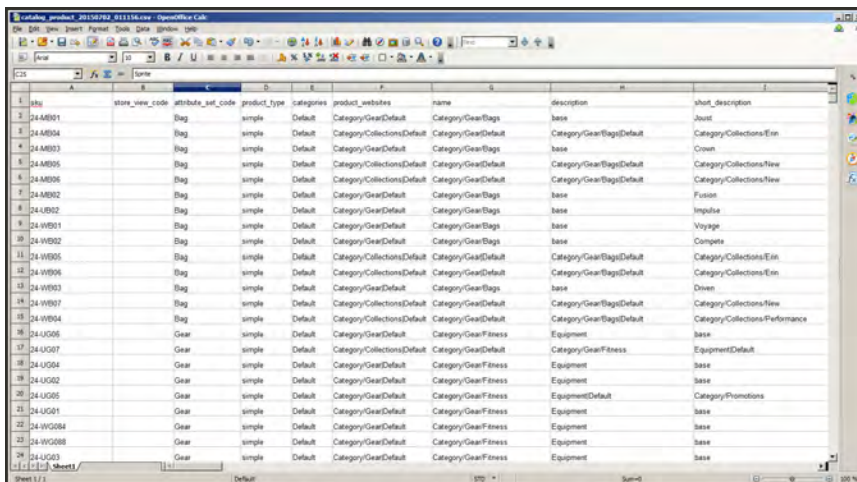
Important! We recommend that you use a program that supports UTF-8 encoding, such as [Notepad++](#) or [OpenOffice Calc](#), to edit CSV files. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento. If you 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

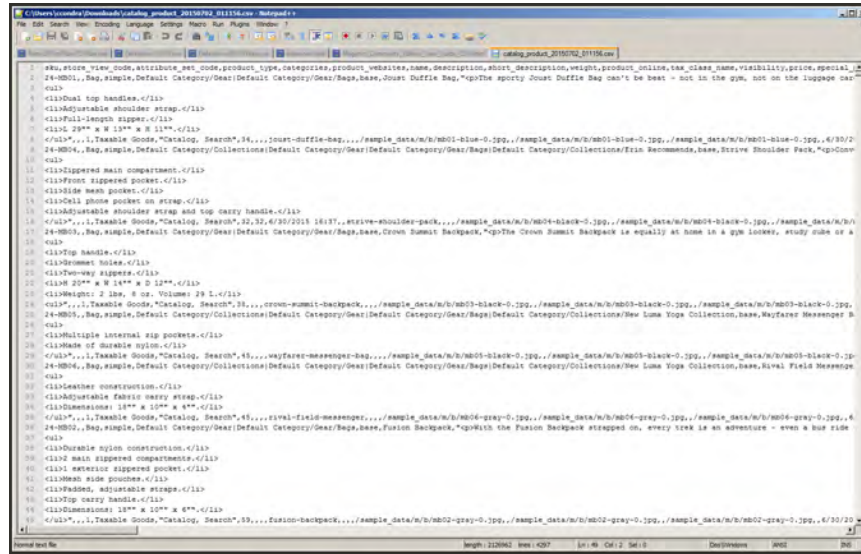
The first row of the table contains the names of each attribute, which are used as column headers. The remaining rows describe the individual product records. Any row that begins with a value in the SKU column is the beginning of a new product record. A single product might include several rows that 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](#).



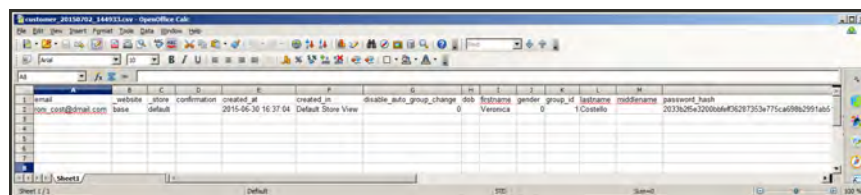
Exported Product CSV in Notepad++

CSV Product Structure

COLUMN NAME	DESCRIPTION
<u><name></u>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not product attributes.
<attribute name>	Column headers with an attribute code or field name identify the column of data. A column might represent a system attribute, or one that was created by the store administrator.

Customer CSV Structure

The customers CSV file contains customer information from the database, and has the following structure:



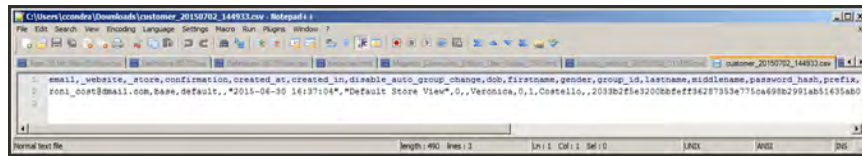
Exported Customer CSV in OpenOffice Calc

The first row of the table contains the names of the attribute columns (which are the same as attribute codes). There are two types of column names, as shown in the following table. Other rows contain attribute values, service data, and complex data. Each row with non-empty

values in the “email” and “_website” columns starts the description of the subsequent customer. Each row can represent customer data with or without address data, or the address data only. In case a row contains only the address data, values in the columns, related to the customer profile, will be ignored and may be empty.

To add or replace more than one address for a customer, in the import file add a row for each new address with empty customer data and the new or updated address data below the customer data row.

For a detailed description of each customer attribute, see: [Customer Attribute Reference](#).



Exported Customer CSV in Notepad++

CSV Customer Structure

COLUMN NAME	DESCRIPTION
_ <name>	Column headers that begin with an underscore contain service entity properties or complex data. Service columns are not customer attributes.
<attribute name>	The names of the columns with values of both system-created attributes, and attributes created by the store administrator.

Data Validation

All data must pass validation before it can be imported into the store, to ensure that the values are consistent with the system database. Validation begins when you tap the Check Data button. During the process, all entities in the import file are verified for the following:

Attributes	Column header names are verified to ensure that they match the corresponding attributes in the system database. The value of each attribute is checked to ensure that it meets the requirements of the data type (decimal, integer, varchar, text, and datetime)
Complex Data	Values that originate from a defined set, such as a drop-down or multiple select input type, are verified to ensure that the values exist in the defined set.
Service Data	The values in service data columns are verified to ensure that the properties or complex data values are consistent with what is already defined in the system database.
Required Values	For new entities, the presence of required attribute values in the file is checked. For existing entities, there is no need to re-check the existence of required attribute values.
Separators	Although the separators aren't visible when viewed in a spreadsheet, data values in a CSV file are separated by comma, and text values are enclosed in double-quotes. During the validation process, the separators are verified, and each set of quotes that enclose character strings is verified to be formatted correctly.

The results of the validation appear in the Validation Results section, and include the following information:

- The number of entities checked
- The number of invalid rows
- The number of errors found

If the data is valid, an “Import Success” message appears.



File is Valid!

If validation fails, read the description of each error, and correct the problem in the CSV file. For example, if a row contains an invalid SKU, the import process stops, and that row, and all subsequent rows are not imported. After correctly the problem, import the data again. If many errors are encountered, it might take several attempts to pass validation.

Data Validation Messages

MESSAGES

DATA VALIDATION

- Product with specified SKU not found in rows: 1
 - URL key for specified store already exists
 - '7z' file extension is not supported
 - 'txt' file extension is not supported
-

ERRORS

- Wrong field type. Type in the imported file %decimal%, expected type is %text%.
- Value is not allowed. Attribute value does not exist in the system.
- Field %column name% is required.
- Wrong value separator is used.
- Wrong encoding used. Supported character encoding is UTF-8 and Windows-1252.
- Imported file does not contain SKU field.
- SKU does not exist in the system.
- Column name %column name% is invalid. Should start with a letter. Alphanumeric.
- Imported file does not contain a header.
- %website name% website does not exist in the system.
- %storeview name% storeview does not exist in the system.
- Imported attribute %attribute name% does not exist in the system.
- Imported resource (image) could not be downloaded from external resource due to timeout or access permissions.
- Imported resource (image) does not exist in the local media storage.
- Product creation error displayed to the user equal to the one seen during manual product save.
- Advanced Price creation error displayed to the user equal to the one seen during the manual product save.
- Customer creation error displayed to the user equal to the one seen during the manual customer save.

Import

Data for all product types can be imported into the store. In addition, you can import customer data, customer address data, and product images. Import supports the following operations:

- Add/Update
- Replace Existing Complex Data
- Delete Entities

The size of the import file is determined by the settings in the php.ini file on the server. The system message on the Import page indicates the current size limit.



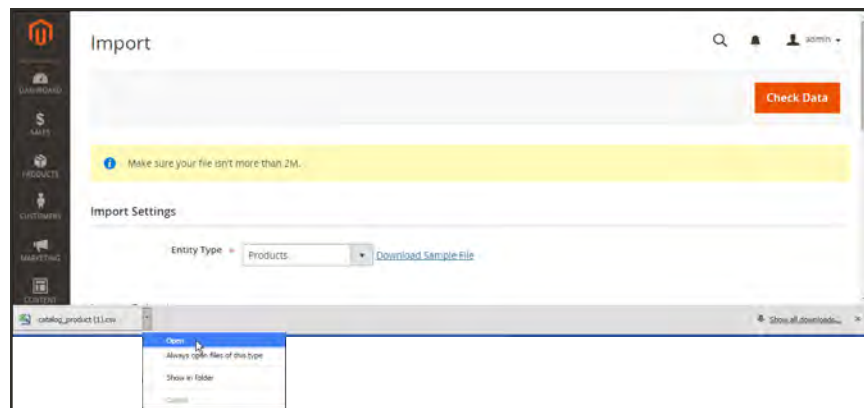
Import

Process Overview:

- Step 1: **Prepare the Data**
- Step 2: **Choose the Import Behavior**
- Step 3: **Identify the Import File**
- Step 4: **Check the Import Data**

Step 1: Prepare the Data

1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Import**.
2. Under Import Settings, set **Entity Type** to one of the following:
 - Advanced Pricing
 - Products
 - Customers and Addresses
 - Customers Main File
 - Customer Addresses
3. Tap **Download Sample File**. Then on the download menu in the lower-left corner of your browser window, choose **Open**.



Download Sample File

The sample file includes column headings with placeholder data for example product types.

sku	website_code	store_view_code	attribute_set_code	product_type	name	description	short_description	weight
simple sku 1	base	default	default	simple	Simple	Product		1 Simple
simple sku 2 with custom options	base	default	default	simple	Simple	Product		2 With <p>Line 1</p> <p>Line 2</p> <p>Line 3</p> <p>Configurable Product 1 Description</p>
configurable sku 1	base	default	default	configurable	Configurable	Product		1 <p>Line 1</p> <p>Line 2</p> <p>Line 3</p> <p>Bundle Product 1 Description</p>
bundle sku 1	base	default	default	bundle	Bundle	Product		1 <p>Line 1</p> <p>Line 2</p> <p>Line 3</p> <p>Bundle Product 2 Description</p>
bundle sku 2	base	default	default	bundle	Bundle	Product		2 <p>Line 1</p> <p>Line 2</p> <p>Line 3</p> <p>Grouped Product 1 Description</p>
grouped sku 1	base	default	default	grouped	Grouped	Product		1 <p>Line 1</p> <p>Line 2</p> <p>Line 3</p> <p>Grouped Product 1 Description</p>

Downloaded Sample File

4. Examine the structure of the sample file. As you prepare your CSV import file, make sure that the column headings are spelled correctly.
5. Verify that the size of your import file does not exceed the limit shown in the message.



6. If the import data includes paths to product images, make sure that the image files have been uploaded to the appropriate location. The default location on the Magento server is: `pub/media/import`.

If the images reside on an external server, make sure that you have the full URL to the directory that contains the images.

Step 2: Choose the Import Behavior

1. Set **Import Behavior** to one of the following:
 - Add/Update
 - Replace Existing Complex Data
 - Delete Entities
2. Do the following:
 - a. Accept the default value of a comma (,) for the **Field separator**.
 - b. Accept the default value of a comma (,) for the **Multiple value separator**.

In a CSV file, a comma is the default separator. To use a different character, make sure that the data in the CSV file matches the character that you specify.



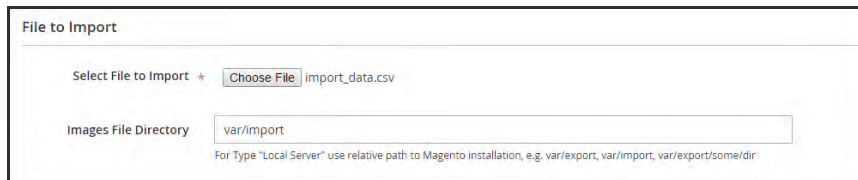
Import Behavior

Step 3: Identify the Import File

1. Tap **Choose File** to select the file to import.
2. Find the CSV file that you prepared to import, and tap **Open**.
3. If the import data includes paths to product images, enter one of the following in the **Images File Directory** field:

- The path to the uploaded images on the Magento server. For example: `var/import`.
- The full URL to the images on another server. For example: `http://domain.com/images`

To learn more about importing product images, see: [Importing Product Images](#).



File to Import

Step 4: Check the Import Data

1. In the upper-right corner, tap **Check Data**.
2. Then, wait a few moments for the validation process to complete. If the import data is valid, the following message appears:



File is Valid!

3. If the file is valid, tap **Import**. Otherwise, correct each problem with the data that is listed in the message, and try to import the file again.
4. The import process continues to the end of the data, unless an error is encountered.

If an error message appears in the Validation Results, correct the problem in the data, and import the file again. For a list of known errors, see: [Import Troubleshooting](#).



URL Key Already Exists

A message appears when the import is complete.

Import Behavior

OPERATION	DESCRIPTION
Add/Update	<p>New product data is added to the existing product data for the existing entries in the database. All fields except <code>sku</code> can be updated.</p> <p>New tax classes that are specified in the import data are created automatically.</p> <p>New product categories that are specified in the import file are created automatically.</p> <p>New SKUs that are specified in the import file are created automatically.</p>
Replace Existing Complex Data	<p>The existing product data is replaced with new data.</p> <div data-bbox="654 779 1437 930" style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p>Exercise caution when replacing data because the existing product data will be completely cleared and all references in the system will be lost.</p> </div> <p>If a SKU in the import data matches the SKU of an existing entity, all fields, including the SKU are deleted, and a new record is created using the CSV data.</p> <p>An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</p>
Delete Entities	<p>Any entities in the import data that already exist in the database are deleted from the database.</p> <p>Delete ignores all columns in the import data, except for SKU. You can disregard all other attributes in the data.</p> <p>An error occurs if the CSV file references a SKU that does not exist in the database. You can Check Data to display error.</p>

Import History

Maintains a record of data that has been imported into your store, including the start date and time, user, execution time, and a link to the imported file.

To view the import history:

1. On the Admin sidebar, tap **System**.
2. Under **Data Transfer**, choose **Import History**.

The screenshot displays the 'Import History' interface in the Magento Admin. It features a sidebar on the left with navigation icons for Dashboard, Sales, Products, Customers, Mapping, Content, and Reports. The main content area is titled 'Import History' and includes a search bar, a 'Reset Filter' button, and a notification that '1 records found'. Below this is a table with the following columns: ID, Start Date&Time, User, Imported File, Error File, Execution Time, and Summary. A single record is listed with ID 1, a start time of Dec 4, 2015, 11:45:41 AM, and a 'Download' link under the Imported File column. The Summary column indicates 'Created: 1994, Updated: 0, Deleted: 0'. At the bottom of the page, there is a copyright notice for Magento Commerce Inc. and a link to 'Report Bugs'.

ID	Start Date&Time	User	Imported File	Error File	Execution Time	Summary
1	Dec 4, 2015, 11:45:41 AM		Download		00:00:36	Created: 1994, Updated: 0, Deleted: 0

Import History

Importing Product Images

Multiple product images of each type can be imported into Magento, and associated with a specific product. The path and file name of each product image is entered in the CSV file, and the image files to be imported are uploaded to the corresponding path on the Magento server or external server.

Magento creates its own directory structure for product images that is organized alphabetically. When you export product data with existing images to a CSV file, you can see the alphabetized path before the file name of each image. However, when you import new images, you don't need to specify a path, because Magento manages the directory structure automatically. Just make sure to enter the relative path to the import directory before the file name of each image to be imported.

To upload images, you must have login credentials and correct permissions to access to the Magento folder on the server. With the correct credentials, you can use any SFTP utility to upload the files from your desktop computer to the server.

Before you try to import a large amount of images, review the steps in the import method that you want to use, and run through the process with a few products. After you understand how it works, you'll feel confident importing large quantities of images.

Important! We recommend that you use a program that supports UTF-8 encoding to edit CSV files, such as **Notepad++** or **OpenOffice Calc**. Microsoft Excel inserts additional characters into the column header of the CSV file, which can prevent the data from being imported back into Magento.

Method 1: Import Images from the Local Server

1. On the Magento server, upload the image files to the `pub/media/import` folder. This is the default folder for importing product images.

```
[magento installation folder]/pub/media/import
```

You can use a different folder on the Magento server, as long as the path to the folder is specified during the import process.

2. In the CSV data, enter the name of each image file to be imported on the correct row, by `sku`, and in the correct column according to image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_image`).

Make sure to include the relative path to the import directory before each file name, as follows:

```
/pub/media/import/image.jpg
```


The CSV file needs to include only the `sku` column and the related image columns.

	A	B	C	D	E	F	G	H
1	sku	base_image	base_image_label	small_image	small_image_label	thumbnail_image	thumbnail_image_label	
2	LFM	/pub/media/import/membership.png	Membership	/pub/media/import/membership.png	Membership	/pub/media/import/membership.png	Membership	
3								
4								

CSV Image Import Data

3. Follow the instructions to **import** the data.

After selecting the file to import, enter the relative path following **Images File Directory**:

```
/pub/media/import
```

File to Import

Select File to Import * catalog-images.csv

Images File Directory

For Type "Local Server" use relative path to Magento installation, e.g. var/export, var/import, var/export/somedir

Images File Directory

If importing multiple images for a single `sku`, insert a blank row below the `sku`, and enter the additional image file names in the appropriate columns. The additional rows are understood to belong to the parent `sku`.

Method 2: Import Images from External Server





1. Upload the images to be imported to the designated folder on the external server.
2. In the CSV data, enter the full URL for each image file in the correct column by image type (`base_image`, `small_image`, `thumbnail_image`, or `additional_image`).

```
http://example.com/images/image.jpg
```




3. Follow the instructions to **import** the data.

Import Guidelines

New Entities



-  Entities are added with the attribute values specified in the CSV file.
-  If there is no value, or there is a non-valid value, for a required attribute with no default value set, then the entity (the corresponding row or rows) cannot be imported.
-  If there is no value, or there is a non-valid value, for a required attribute with the default value set, then the entity (the corresponding row or rows) is imported, and the default value is set for the attribute.
-  If the complex data is not valid, then the entity (the corresponding row or rows) cannot be imported.

Existing Entities

-  For attributes that are not complex data, the values from the import file, including the empty values for the non-required attributes, replace the existing values.
-  If there is no value, or there is a non-valid value, for a required attribute, then the existing value is not replaced.
-  If the complex data for the entity is invalid, the entity (the corresponding row or rows) cannot be imported, except the case, when Delete Entities was selected in the Import Behavior drop-down menu.



Complex Data

If an attribute that is specified in the import file already exists, and its value is derived from a defined set of values, the following applies:

-  If the value is not already included in the defined set of values, the row can be imported and a default value, if defined, is set for the attribute.
-  If the value is already included in the defined set, the corresponding row cannot be imported.

If an attribute name is specified in the import file but is not yet defined in the system, it is not created, and its values are not imported.

Invalid Files

-  A file cannot be imported if all rows are invalid.
-  A non-existing service data or complex data name is specified in the import file, such as a column with a “_<non-existing name>” heading.

Export

The best way to become familiar with the structure of your database is to export the data and open it in a spreadsheet. Once you become familiar with the process, you'll find that it is an efficient way to manage large amounts of information.

To export data:

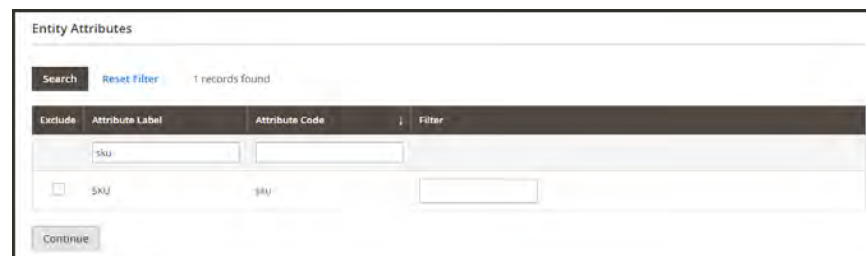
1. On the Admin sidebar, tap **System**. Then under **Data Transfer**, choose **Export**.
2. In the Export Settings section, specify the following:
 - a. Set **Entity Type** to one of the following:
 - Products
 - Customers Main File
 - Customer Addresses
 - b. Accept the default **Export File Format** of “CSV.”



The screenshot shows the 'Export Settings' form. It has two dropdown menus: 'Entity Type' which is currently set to 'Products', and 'Export File Format' which is currently set to 'CSV'.

Export Settings

3. The Entity Attributes section lists all the available attributes in alphabetical order. You can use the standard **list controls** to search for specific attributes, and to sort the list. The Search and Reset Filter controls control the display of the list, but have no effect on the selection of attributes to be included in the export file.



The screenshot shows the 'Entity Attributes' section. At the top, there is a search bar containing 'sku' and a 'Reset Filter' button. Below the search bar, it says '1 records found'. A table displays the results with columns for 'Exclude', 'Attribute Label', 'Attribute Code', and 'Filter'. The table has one row with 'SKU' in the 'Attribute Label' column and 'sku' in the 'Attribute Code' column. There is a 'Continue' button at the bottom left.

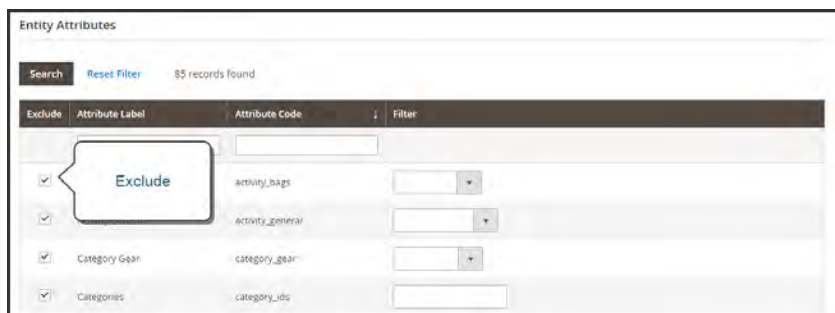
Filtered Entity Attributes

- 4. To filter the exported data based on attribute value, do the following:
 - To export only records with specific attribute values, enter the required value in the **Filter** column. The following example exports only a specific SKU.



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.



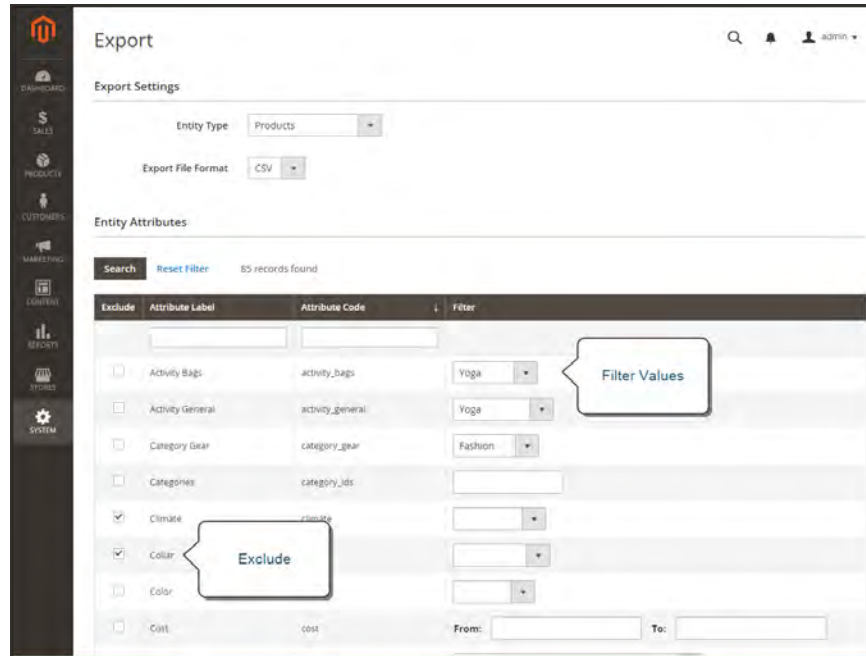
Exclude Attributes

- 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 include only products manufactured in that country.

The type of filter corresponds to the data type. For date fields, you can choose the date from the Calendar . To learn more, see: [Attribute Input Types](#). The format of the date is determined by the **locale**.

To include only records with a specific value, such as a sku, type the value into the Filter field. Some fields such as Price, Weight, and Set Product as New have a from/to range of values.

Exclude Attributes

The checkbox in the first column is used to exclude attributes from the export file. If an attribute is excluded, the associated column in the export data is included, but empty.

Export Criteria

EXCLUDE	FILTER	RESULT
<input type="checkbox"/>	No	The exported file contains each attribute for all existing records.
<input type="checkbox"/>	Yes	The export file contains each attribute with only the records allowed by the filter.
<input checked="" type="checkbox"/>	No	The export file does not include the column for the excluded attribute, but does include all existing records.
<input checked="" type="checkbox"/>	Yes	The export file does not include the column for the excluded attribute, and contains only the records allowed by the filter.

Product Attribute Reference

The following table lists the attributes from a typical product export, in the default order in which they appear. Each attribute is represented in the CSV file as a column, and product records are represented by rows. Columns that begin with an underscore contain service data such as properties or option values for complex data.

The installation used to export this data has the sample data installed, and has two websites and several store views. Although this list includes all columns that are typically exported, the `sku` is the only required value. To import data, you can include only the columns with changes. The `sku` should be the first column, but the order of the rest of the attributes doesn't matter.

Simple Product CSV File Structure

ATTRIBUTE	DESCRIPTION
<code>sku</code>	<p>(Required) The Stock-Keeping Unit is a unique, alphanumeric identifier that is used to track inventory. A SKU can be up to 64 characters in length. For example: <code>sku123</code></p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>A SKU longer than 64 characters will cause import to fail.</p> </div>
<code>store_view_code</code>	<p>Identifies the specific store view(s) where the product is available. If blank, the product is available at the default store view. For example: <code>storeview1</code></p> <p><code>english,spanish</code></p>
<code>attribute_set_code</code>	<p>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:</p> <p><code>default</code></p>
<code>product_type</code>	<p>Indicates the type of product. Values include:</p>

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
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.
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	<p>Indicates each category that is assigned to the product. Separate categories and subcategories with a forward slash. To indicate multiple category paths, separate each path with a pipe “ ” symbol. For example:</p> <p>Default Category/Gear Default Category/Gear/Bags</p>

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
product_websites	<p>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:</p> <p>base base,website2</p>
name	The product name appears in all product listings, and is the name that customers use to identify the product.
description	The product description provides detailed information about the product, and might include simple HTML tags.
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	<p>Determines if the product is available for sale in the store. Values include:</p> <p>1 (Yes) The product is immediately available for sale in your store.</p> <p>0 (or blank) (No) The product is not included in online catalog listings.</p>
tax_class_name	The name of the tax class that is associated with this product.
visibility	Determines if the product is visible in the catalog, and made available for search. Values include:

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	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.
<code>price</code>	The price that the product is offered for sale in your store.
<code>special_price</code>	The discounted price of the product during the specified date range.
<code>special_price_from_date</code>	The beginning date of the time period when the special price is in effect.
<code>special_price_to_date</code>	The last date of the time period when the special price is in effect.
<code>url_key</code>	The part of the URL that identifies the product. The default value is based on the product name. For example: <code>product-name</code>
<code>meta_title</code>	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.
<code>meta_keywords</code>	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: <code>keyword1,keyword2,keyword3</code> .

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
<code>meta_description</code>	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.
<code>base_image</code>	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: <code>/sample_data/m/b/mb01-blue-0.jpg</code> To upload a new image or write over an existing image, enter the file name, preceded by a forward slash. For example: <code>/image.jpg</code>
<code>base_image_label</code>	The label that is associated with the base image.
<code>small_image</code>	The file name of the small image that is used on catalog pages, preceded by a forward slash. For example: <code>/image.jpg</code>
<code>small_image_label</code>	The label associated with the small image. For example: Small Image 1, Small Image 2
<code>thumbnail_image</code>	The file names of any thumbnail image to appear in the gallery on the product page, preceded by a forward slash. For example: <code>/image.jpg</code>
<code>thumbnail_image_label</code>	The label associated with any thumbnail images. For example: Thumbnail 1, Thumbnail 2
<code>created_at</code>	Indicates the date when the product was created. The date is automatically generated when the product is created, but can be edited later.
<code>updated_at</code>	Indicates the date when the product was last updated.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
<code>new_from_date</code>	Specifies the “from” date for new product listings, and determines if the product is featured as a new product.
<code>new_to_date</code>	Specifies the “to” date for new product listings, and determines if the product is featured as a new product.
<code>display_product_options_in</code>	If the product has multiple options, determines where they appear on the product page. Values include: Product Info Column Block after Info Column
<code>map_price</code>	The minimum advertised price of the product. (Appears only if MAP is enabled.)
<code>msrp_price</code>	The manufacturer’s suggested retail price for the product. (Appears only if MAP is enabled.)
<code>map_enabled</code>	Determines if Minimum Advertised Price is enabled in the configuration. Values include: 1 (Yes) MAP is enabled. 0 (or blank) (No) MAP is not enabled.
<code>gift_message_available</code>	Determines if a gift message can be included with the product purchase. Values include: 1 (Yes) The option to include a gift message is presented to the customer. 0 (or blank) (No) The option to include a gift message is not presented to the customer.
<code>custom_design</code>	Lists the available themes that can be applied to the product page.
<code>custom_design_from</code>	Specifies the beginning date when the selected theme is applied to the product page.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION												
<code>custom_design_to</code>	Specifies the end date when the selected theme is applied to the product page.												
<code>custom_layout_update</code>	Additional XML code that is applied as a layout update to the product page.												
<code>page_layout</code>	<p>Determines the page layout of the product page. Values include:</p> <table border="0"> <tr> <td>No layout updates</td> <td>No change is made to the page layout.</td> </tr> <tr> <td>1 column</td> <td>Applies a one- column layout to the product page.</td> </tr> <tr> <td>2 columns with left bar</td> <td>Applies a two-column layout with a left sidebar to the product page.</td> </tr> <tr> <td>2 columns with right bar</td> <td>Applies a two-column layout with a right sidebar to the product page.</td> </tr> <tr> <td>3 columns</td> <td>Applies a three-column layout to the product page.</td> </tr> <tr> <td>empty</td> <td>Applies a blank layout to the product page.</td> </tr> </table>	No layout updates	No change is made to the page layout.	1 column	Applies a one- column layout to the product page.	2 columns with left bar	Applies a two-column layout with a left sidebar to the product page.	2 columns with right bar	Applies a two-column layout with a right sidebar to the product page.	3 columns	Applies a three-column layout to the product page.	empty	Applies a blank layout to the product page.
No layout updates	No change is made to the page layout.												
1 column	Applies a one- column layout to the product page.												
2 columns with left bar	Applies a two-column layout with a left sidebar to the product page.												
2 columns with right bar	Applies a two-column layout with a right sidebar to the product page.												
3 columns	Applies a three-column layout to the product page.												
empty	Applies a blank layout to the product page.												
<code>product_options_container</code>	<p>If the product has multiple options, determines where they appear on the product page. Values include:</p> <ul style="list-style-type: none"> Product Info Column Block after Info Column 												
<code>msrp_display_actual_price_type</code>	Determines where the actual price of a product is visible to the customer. Values include:												

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p>In Cart Displays the actual product price in the shopping cart.</p>
	<p>Before Order Confirmation Displays the actual product price at the end of the checkout process, just before the order is confirmed.</p>
	<p>On Gesture Displays the actual product price in a popup when the customer clicks the “Click for price” or “What’s this?” link.</p>
<p>country_of_manufacture</p>	<p>Identifies the country where the product was manufactured.</p>
<p>additional_attributes</p>	<p>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</p>
<p>qty</p>	<p>The quantity of the product that is currently in stock.</p>
<p>out_of_stock_qty</p>	<p>The stock level that determines the product to be out of stock.</p>
<p>use_config_min_qty</p>	<p>Determines if the default value from the configuration is used, and corresponds to the Use Config Settings checkbox. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
<p>is_qty_decimal</p>	<p>Determines if the qty attribute has a decimal value. Values include:</p>

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p>1 (Yes) The value of the <code>qty</code> attribute is a decimal value.</p> <p>0 (or blank) (No) The value of the <code>qty</code> attribute is a whole number (integer).</p>
<code>allow_backorders</code>	Determines if your store allows backorders, and how they are managed.
<code>use_config_backorders</code>	<p>Determines if the default configuration setting for backorders is used, and corresponds to the state of the Use Config Settings checkbox. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
<code>min_cart_qty</code>	Specifies the minimum quantity of the item that can be purchased in a single order.
<code>use_config_min_sale_qty</code>	<p>Determines if the default configuration setting for minimum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
<code>max_cart_qty</code>	Specifies the maximum quantity of the product that can be purchased in a single order.
<code>use_config_max_sale_qty</code>	Determines if the default configuration setting for maximum quantity is used, and corresponds to the state of the Use Config Settings checkbox.. Values include:

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
is_in_stock	Indicates if the product is in stock.
notify_on_stock_below	Specifies the stock level that triggers an “out of stock” notification.
use_config_notify_stock_qty	<p>Determines if the default configuration setting is used to trigger stock level notification, and corresponds to the state of the Use Config Settings checkbox. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
manage_stock	<p>Determines if inventory control is used to manage the product. Values include:</p> <p>1 (Yes) Activates full inventory control to manage stock levels of the product.</p> <p>0 (or blank) (No) The system does not keep track of the number of items that are currently in stock.</p>
use_config_manage_stock	<p>Determines if the default configuration setting for managing stock is used, and corresponds to the state of the Use Config Settings checkbox. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
<code>use_config_qty_increments</code>	<p>Determines if the default configuration setting for quantity increments is used, and corresponds to the state of the Use Config Settings checkbox.. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
<code>qty_increments</code>	Determines if the product is sold in quantity increments. Options include: Yes / No
<code>use_config_enable_qty_inc</code>	<p>Determines if the default configuration setting to enable quantity increments is used, and corresponds to the state of the Use Config Settings checkbox. Values include:</p> <p>1 (Yes) The default configuration setting is used for the value of this attribute.</p> <p>0 (or blank) (No) The default configuration can be overridden for the value of this attribute.</p>
<code>enable_qty_increments</code>	Determines if quantity increments are enabled for the product.
<code>is_decimal_divided</code>	Determines if parts of the product can be shipped separately. Options include: Yes / No
<code>website_id</code>	For installations with multiple websites, identifies a specific website where the product is available. If blank, the product is available in all websites.
<code>related_skus</code>	Lists the <code>sku</code> of each product that has been identified as a Related Product . For example: 24-WG080,24-UG03,24-UG01,24-UG02
<code>crosssell_skus</code>	Lists the <code>sku</code> of each product that has been identified as a Cross-sell .

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
upsell_skus	Lists the sku of each product that has been identified as an Upsell .
additional_images	The file names of any additional image to be associated with the product, preceded by a forward slash. For example: /image.jpg
additional_image_labels	The labels associated with any additional images. For example: Label 1, Label 2
custom_options	For example: name=Color,type=drop_down,required=1,price=,price_type=fixed,sku=,option_title=Black name=Color,type=drop_down,required=1,price=,price_type=fixed,sku=,option_title=White

SERVICE DATA FOR PRODUCT VARIATIONS

_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.

Simple Product CSV File Structure (cont.)

ATTRIBUTE	DESCRIPTION
	<p>Applies to:</p> <p>Configurable Products</p>
<p><code>_associated_sku</code></p>	<p>The SKU of a product that is associated with a grouped product.</p> <p>Applies to:</p> <p>Grouped Products</p> <p>Bundle Products</p>
<p><code>_associated_default_qty</code></p>	<p>Determines the quantity of the associated product that is included. Applies to:</p> <p>Configurable Products</p> <p>Grouped Products</p> <p>Bundle Products</p>
<p><code>_associated_position</code></p>	<p>Determines the position of the associated product when listed with other associated products. Applies to:</p> <p>Configurable Products</p> <p>Grouped Products</p> <p>Bundle Products</p>

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

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

¹Data that is associated with multiple product options.

Complex Data Attributes (cont.)

ATTRIBUTE	DESCRIPTION
GROUPED PRODUCTS	
<code>associated_skus</code>	Identifies the SKUs of the individual products that make up the group.
BUNDLE PRODUCTS	
<code>bundle_price_type</code>	Determines if the price of a bundle item is fixed or dynamic.
<code>bundle_sku_type</code>	Determines if each item is assigned a variable, dynamic SKU, or if a fixed SKU is used for the bundle. Options include: Fixed / Dynamic.
<code>bundle_weight_type</code>	Determines if the weight of a bundle item is variable or fixed.
<code>bundle_values</code>	Describes teach value associated with a bundle option. For example: name=Bundle Option One,type=dropdown; required=1, sku=sku-option2,price=10, price_type=fixed

Advanced Pricing

Advanced Price Import/Export allows you to quickly update pricing information for product groups and tier prices. The process to **import** and **export** advanced price data is the same as any other entity type. The sample CSV file contains tier and group prices for each product type that supports advanced pricing. Making changes to advanced pricing does not affect the rest of the product record.

	A	B	C	D	E	F	G	H	I
1	sku	tier_price_website	tier_price_customer_group	tier_price_qty	tier_price	group_price_website	group_price_customer_group	group_price_price	
2	sku123	website1	General	2	10				
3	sku124	All Websites [USD]	ALL GROUPS	3	15				
4	sku123					website1	General		11
5	sku124					All Websites [USD]	General		12
6									

Advanced Price Sample File

Advanced Pricing Attributes

ATTRIBUTE	DESCRIPTION
sku	(Required) The Stock-Keeping Unit is a unique, alphanumeric identifier that is used to track inventory. A SKU can be up to 64 characters in length. For example: sku123
<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> A SKU longer than 64 characters will cause import to fail. </div>	
tier_price_website	The website code identifies each website where tier pricing is available. For example: website1 All Websites [USD]
tier_price_customer_group	Identifies the customers groups where tier pricing is available. For example: ALL GROUPS NOT LOGGED IN General Wholesale Retailer
tier_price_qty	The quantity of the product that must be ordered to receive the tier price discount.
tier_price	The discounted tier price of the product. For bundle products, tier price is calculated as a percentage.

Advanced Pricing Attributes (cont.)

ATTRIBUTE	DESCRIPTION
<code>group_price_website</code>	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]
<code>group_price_customer_group</code>	Identifies the customers groups where group pricing is available. For example: NOT LOGGED IN General Wholesale Retailer
<code>group_price</code>	The discounted group price of the product. For bundle products, group price is calculated as a percentage.

Customer Attribute Reference

The following tables list the attributes from a typical export of the Customers Main File and Customer Addresses. The installation that was used to export this data has two websites and several store views, with the sample data installed.

Each attribute, or field, is represented in the CSV file as a column, and customer records are represented by rows. Columns that begin with an underscore are service entities that contain properties or complex data.

Customers Main File

ATTRIBUTE	DESCRIPTION
email	
_website	
_store	
confirmation	
created_at	
created_in	
disable_auto_group_change	
dob	
firstname	
gender	
group_id	
lastname	
middlename	
password_hash	
prefix	
rp_token	

Customers Main File (cont.)

ATTRIBUTE	DESCRIPTION
rp_token_created_at	
store_id	
suffix	
taxvat	
website_id	
password	

Customer Addresses

ATTRIBUTE	DESCRIPTION
_website	
_email	
_entity_id	
city	
company	
country_id	
fax	
firstname	
lastname	
middlename	
postcode	
prefix	
region	
region_id	
street	
suffix	

Customer Addresses (cont.)

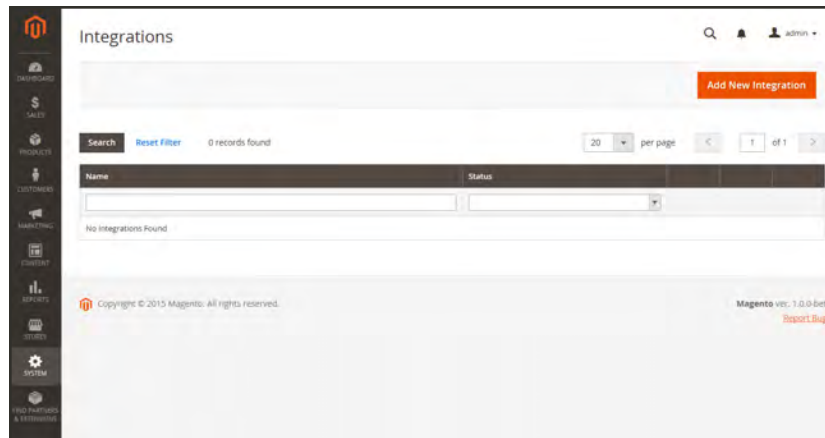
ATTRIBUTE	DESCRIPTION
telephone	
vat_id	
vat_is_valid	
vat_request_date	
vat_request_id	
vat_request_success	
_address_default_billing_	Identifies the default billing address. A value of 1 indicates that the address is the default billing address of the customer. Values: 1 / 0
_address_default_shipping_	Identifies the default shipping address. A value of 1 indicates that the address is the default shipping address of the customer. Values: 1 / 0



CHAPTER 70:

Integrations

Establishes the location of OAuth credentials and redirect URL for third-party integrations, and identifies the available API resources that are needed for the integration. The following path uses our Web APIs to onboard a merchant to a third-party SaaS platform.



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

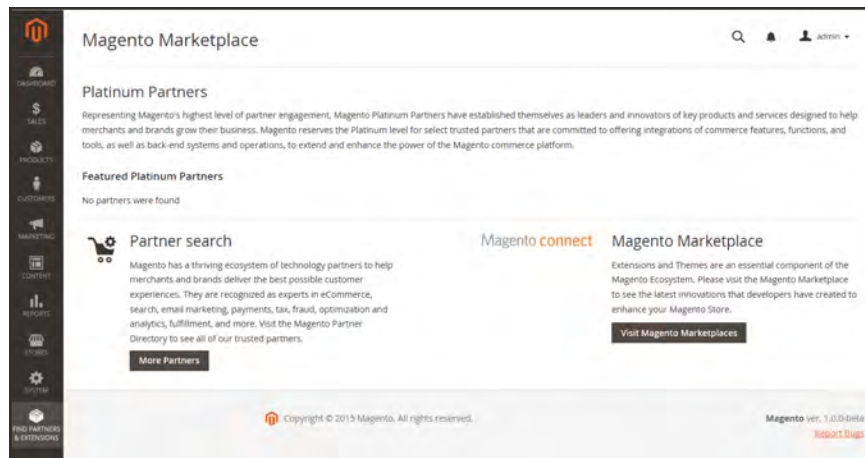
4. Set **Allow Anonymous Guest Access** to “Yes,”
5. When complete, tap **Save Config**.

To learn more, see: “[Restricting access to anonymous web APIs](#)” in the Magento developer documentation.

Magento Marketplace

Magento Marketplace is the next generation of the world’s largest eCommerce application store, offering merchants a curated selection of solutions, and providing qualified developers the tools, platform, and prime location to build a thriving business.

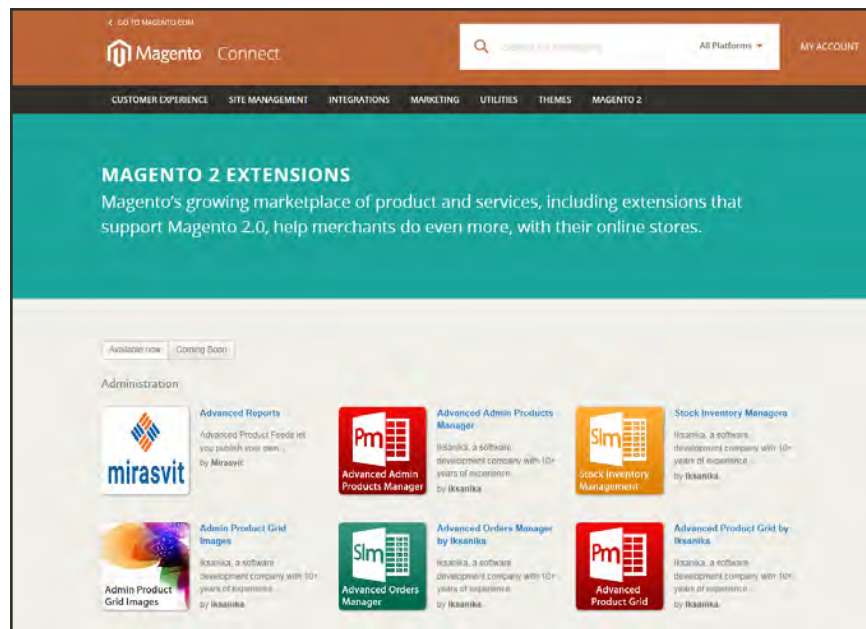
To learn more, **Find Partners & Extensions** in the Admin sidebar.



Magento Marketplace

Magento Connect

Magento Connect is Magento’s original marketplace for Magento extensions. There are hundreds of extensions and themes available from all over the world. Magento out-of-the-box supports a few of the most popular ones. However, community members are developing and publishing new extensions in order to extend Magento with various new features.



Magento Connect



CHAPTER 71:

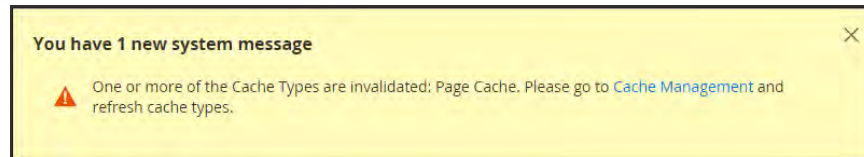
Tools

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](#)
- [Alternate Media Storage](#)
- [Backups](#)
- [Index Management](#)
- [Web Setup Wizard](#)
- [Permissions](#)
- [Security](#)

Cache Management

Magento's cache management system is an easy way to improve the performance of your site. Whenever a cache needs to be refreshed, a notice appears at the top of the workspace to guide you through the process. Follow the link to Cache Management, and refresh the invalid caches.



Update Cache Message

The Cache Management page shows the status of each primary cache and its associated tag. The large buttons in the upper-right corner can be used to flush the Magento Cache, or the all-inclusive Cache Storage. At the bottom of the page there are additional buttons to flush the catalog product images cache and JavaScript/CSS cache. After clearing a cache, always refresh your browser to make sure that you can see the most recent files.

Cache Type	Description	Tags	Status	
<input type="checkbox"/>	Configuration	Various XML configurations that were collected across modules and merged.	CONFIG	ENABLED
<input type="checkbox"/>	Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/>	Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED
<input type="checkbox"/>	Collections Data	Collection data files.	COLLECTION_DATA	ENABLED
<input type="checkbox"/>	Database DDL operations	Results of DDL queries, such as describing tables or indexes.	DDL_DDL	ENABLED
<input type="checkbox"/>	EAV types and attributes	Entity types declaration cache.	EAV	ENABLED
<input type="checkbox"/>	Page Cache	Full page caching.	FPC	INVALIDATED
<input type="checkbox"/>	Integrations Configuration	Integration configuration file.	INTEGRATION	ENABLED
<input type="checkbox"/>	Integrations API Configuration	Integrations API configuration file.	INTEGRATION_API_CONFIG	ENABLED
<input type="checkbox"/>	Target Rule	Target Rule Index.	TARGET_RULE	ENABLED
<input type="checkbox"/>	Translations	Translation files.	TRANSLATE	ENABLED
<input type="checkbox"/>	Web Services Configuration	REST and SOAP configurations, generated WSDL file.	WEBSERVICE	ENABLED

Cache Management

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.

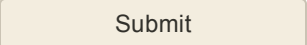
The message, “Image cache was cleaned” appears at the top of the workspace.
2. Make sure to also clear the cache of your browser.

To flush the JavaScript/CSS cache:

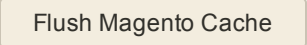
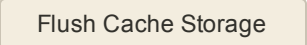
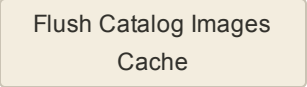


1. From the Cache Storage Management page, under Additional Cache Management, click **Flush JavaScript/CSS Cache** to clear any JavaScript and CSS files that have been merged into a single file.

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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Enable Enables all selected caches. Disable Disables all selected caches. Refresh Refreshes all selected caches.
	Applies the action to all selected caches.

Button Descriptions

BUTTON	DESCRIPTION
	Removes all items in the default Magento cache (<code>var/cache</code>), according to their associated Magento tags.
	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.
	Removes all automatically resized and watermarked catalog images that are stored at: <code>media/catalog/product/cache</code> . If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
	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.
	Removes preprocessed view files and static files.

Cache Descriptions

CACHE	DESCRIPTION
Configuration	<p>Various XML configurations that were collected across modules and merged. Associated Tag: <code>CONFIG</code></p> <p>System: <code>config.xml</code> <code>local.xml</code></p> <p>Module: <code>config.xml</code></p>
Layouts	<p>Layout building instructions.</p> <p>Associated Tag: <code>LAYOUT_GENERAL_CACHE_TAG</code></p>
Blocks HTML output	<p>Page blocks HTML. Associated Tag: <code>BLOCK_HTML</code></p>
Collections Data	<p>Collection data files. Associated Tag: <code>COLLECTION_DATA</code></p>
Database DDL operations	<p>Results of DDL queries, such as describing tables or indexes.</p> <p>Associated Tag: <code>DB_DDL</code></p>
EAV types and attributes	<p>Entity types declaration cache. Associated Tag: <code>EAV</code></p>
Page Cache	<p>Full page caching. Associated Tag: <code>FPC</code></p>
Integrations Configuration	<p>Integration configuration file. Associated Tag: <code>INTEGRATION</code></p>
Integrations API Configuration	<p>Integrations API configuration file.</p> <p>Associated Tag: <code>INTEGRATION_API_CONFIG</code></p>
Target Rule	<p>The target rule index.</p> <p>Associated Tag: <code>TARGET_RULE</code></p>
Translations	<p>Translation files. Associated Tag: <code>TRANSLATE</code></p>
Web Services Configuration	<p>REST and SOAP configurations, generated WSDL file.</p> <p>Associated Tag: <code>WEBSERVICE</code></p>

Full-Page Cache

We currently recommend that Full Page Cache is used only in a development environment.

Magento Community Edition 2.0 uses full-page caching on the server to quickly display category, product, and CMS pages. Full-page caching improves response time and reduces the load on the server. Without caching, each page might need to run blocks of code and retrieve information from the database. However, with full-page caching enabled, a fully-generated page can be read directly from the cache. For more technical information, see: [Configure and Use Varnish](#)

Cached content can be used to process the requests from similar types of visits. As a result, pages shown to a casual visitor might differ from those shown to a customer. For the purposes of caching, each visit is one of three types:

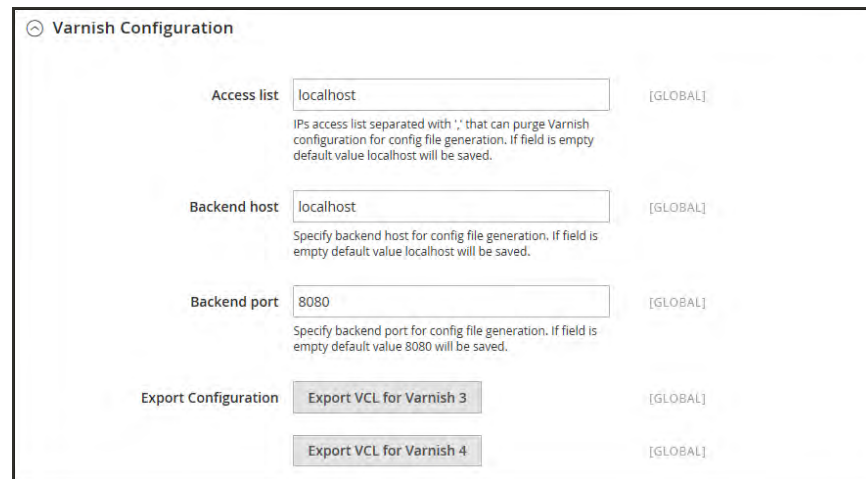
Non-sessioned	During a non-sessioned visit, a shopper views pages, but does not interact with the store. The system caches the content of each page viewed, and serves them to other non-sessioned shoppers.
Sessioned	During a sessioned visit, shoppers who interact with the store—through activities such as comparing products or adding products to the shopping cart—are assigned a session ID. Cached pages that are generated during the session are used only by that shopper during the session.
Customer	Customer sessions are created for those who have registered for an account with your store and shop while logged in to their accounts. During the session, customers can be presented with special offers, promotions, and prices that are based on the customer group to which they are assigned.

To configure the full-page cache:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand ☺ the **Full Page Cache** section.

Full Page Cache

4. Set **Caching Application** to one of the following:
 - Built-in Application
 - Varnish Caching
5. To set the time-out for the page cache, enter the **TTL for public content**. (The default value is 86400)
6. If using Varnish, complete the **Varnish Configuration** section as follows:
 - a. In the **Access list** field, enter the IP addresses that can purge the Varnish configuration to generate a config file. Separate multiple entries with a comma. The default value is “localhost.”
 - b. In the **Backend host** field, enter the IP address of the backend host that generates config files. The default value is “localhost.”
 - c. In the **Backend port** field, identify the backend port that is used to generate config files. The default value is: “8080.”
 - d. To export the configuration as a `varnish.vcl` file, tap the button for the version of Varnish that you use.
 - Export VCL for Varnish 3
 - Export VCL for Varnish 4



The screenshot shows the 'Varnish Configuration' interface. It contains the following fields and options:

- Access list:** A text input field containing 'localhost'. To its right is a '[GLOBAL]' label. Below the field is a small text description: 'IPs access list separated with ',' that can purge Varnish configuration for config file generation. If field is empty default value localhost will be saved.'
- Backend host:** A text input field containing 'localhost'. To its right is a '[GLOBAL]' label. Below the field is a small text description: 'Specify backend host for config file generation. If field is empty default value localhost will be saved.'
- Backend port:** A text input field containing '8080'. To its right is a '[GLOBAL]' label. Below the field is a small text description: 'Specify backend port for config file generation. If field is empty default value 8080 will be saved.'
- Export Configuration:** Two buttons are visible: 'Export VCL for Varnish 3' and 'Export VCL for Varnish 4'. To the right of each button is a '[GLOBAL]' label.

Varnish Configuration

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

Alternate Media Storage

Magento Community Edition 2.0 gives you the option to store media files in a database on a database server, or on a Content Delivery Network (CDN), as opposed to storing them on the file system of the web server. The advantage of using alternate storage is that it minimizes the effort required to synchronize media when multiple instances of the system that are deployed on different servers that need access to the same images, CSS files, and other media files.

- **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:

The screenshot shows a configuration panel titled "Storage Configuration for Media". It contains the following elements:

- Media Storage:** A dropdown menu with "Database" selected. To its right is the label "[GLOBAL]".
- Select Media Database:** An empty dropdown menu. To its right is the label "[GLOBAL]".
- Synchronize:** A button with the text "Synchronize".
- Environment Update Time:** A text input field containing "3600". To its right is the label "[GLOBAL]".

Below the "Synchronize" button, there is a note: "After selecting a new media storage location, press the Synchronize button to transfer all media to that location. Media will not be available in the new location until the synchronization process is complete."

Storage Configuration for Media (Database)

- a. Set **Media Storage** to “Database.”
 - b. Set **Select Media Database** to the database you want to use.
 - c. Tap **Synchronize** to transfer the existing media to the newly selected database.
 - d. Enter the **Environment Update Time** in seconds.
5. When complete, tap **Save Config**.

Using a Content Delivery Network

Storing media files in a CDN is another alternative supported in Magento. There is no full integration with a specific CDN, and you are responsible for choosing and configuring a CDN on your own.

After configuring the CDN, you must complete the configuration from the Admin. The changes can be made at either the global or website level. When a CDN is used for media storage, all paths to media on store pages are changed to the CDN paths that are specified in the configuration.

CDN Workflow

- 1 Browser requests media.** A page from the store opens in the customer's browser, and the browser requests the media that is specified in the HTML.
- 2 Request sent to CDN; images found and served.** The request is sent first to the CDN. If the CDN has the images in storage, it serves the media files to the customer's browser.
- 3 Media not found, request sent to Magento web server.** If the CDN doesn't have the media files, the request is sent to the Magento web server. If the media files are found in the file system, the web server sends them to the customer's browser.

Important! For security, when a CDN is used as media storage, JavaScript may not function properly if the CDN is located outside of your subdomain.

To configure a content delivery network:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. In the upper-left corner, set **Store View** as needed.
4. Expand ☺ the **Base URLs** section. Then, do the following:

Base URLs ☺

Any of the fields allow fully qualified URLs that end with '/' (slash) e.g. http://example.com/magento/

Base URL	<input type="text" value="http://10.64.201.194/magento2/"/>	[STORE VIEW]
	Specify URL or {{base_url}} placeholder.	
Base Link URL	<input type="text" value="{{unsecure_base_url}}"/>	[STORE VIEW]
	May start with {{unsecure_base_url}} placeholder.	
Base URL for Static View Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{unsecure_base_url}} placeholder.	
Base URL for User Media Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{unsecure_base_url}} placeholder.	

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) ⊞

Any of the fields allow fully qualified URLs that end with '/' (slash) e.g. https://example.com/magento/

Secure Base URL	<input type="text" value="{{unsecure_base_url}}"/>	[STORE VIEW]
	Specify URL or {{base_url}}, or {{unsecure_base_url}} placeholder.	
Secure Base Link URL	<input type="text" value="{{secure_base_url}}"/>	[STORE VIEW]
	May start with {{secure_base_url}} or {{unsecure_base_url}} placeholder.	
Secure Base URL for Static View Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{secure_base_url}}, or {{unsecure_base_url}} placeholder.	
Secure Base URL for User Media Files	<input type="text"/>	[STORE VIEW]
	May be empty or start with {{secure_base_url}}, or {{unsecure_base_url}} placeholder.	
Use Secure URLs on Storefront	<input type="text" value="No"/> ▼	[STORE VIEW]
	Enter https protocol to use Secure URLs on Storefront.	
Use Secure URLs in Admin	<input type="text" value="No"/> ▼	[GLOBAL]
	Enter https protocol to use Secure URLs in Admin.	
Offloader header	<input type="text" value="SSL_OFFLOADED"/>	[GLOBAL]

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**.

Backups

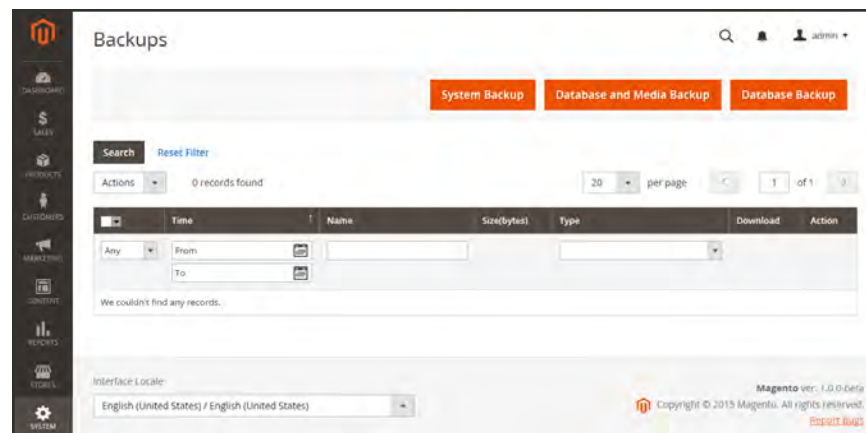
Magento Community Edition 2.0 gives you the ability to back up different parts of the system—such as the file system, database, and media files—and to rollback automatically. A record for each backup appears in the grid on the Backups page. Deleting a record from the list deletes the archived file as well. Database backup files are compressed using the .gz format. For the system backups and database and media backups, the .tgz format is used. As a best practice, you should restrict access to backup tools, and back up before installing extensions and updates.

Restrict Access to Backup Tools

Access to the Backups and Rollback management tool can be restricted by configuring user permissions for backup and rollback resources. To restrict access, leave the corresponding checkbox unselected. If you need to grant access to rollback resources, you must grant access to backup resources as well.

Backup Before Installing Extensions and Updates

Always perform a backup before you install an extension or update Magento. Magento Connect Manager (MCM) includes a backup option that you can use before installing an extension or upgrading to a new release.



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:

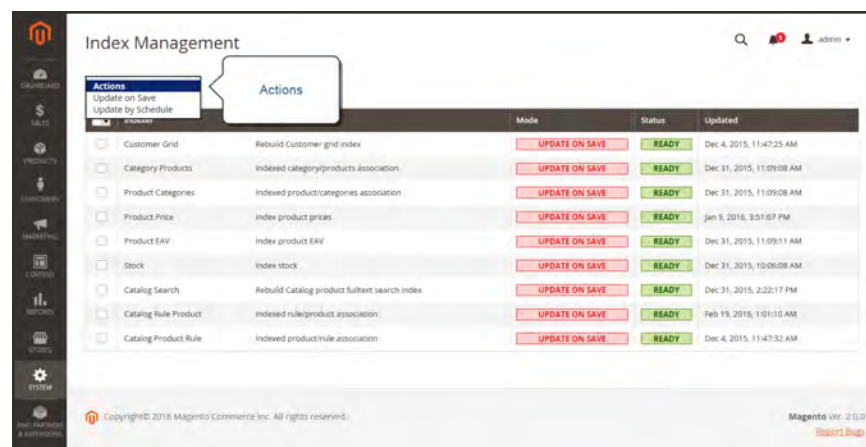
System Backup	Creates a complete backup of the database and the file system. During the process, you can choose to include the media folder in the backup.
Database and Media Backup	Creates a backup of the database and the media folder.
Database Backup	Creates a backup of the database.
3. To put the store 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.

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.



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	<p>Indicates the current update mode for each indexer. Options:</p> <table border="0"> <tr> <td>Update on Save</td> <td>The index is set to update whenever a change is saved.</td> </tr> <tr> <td>Update on Schedule</td> <td>The index is set to update on schedule according to a cron job.</td> </tr> </table>	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.				
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	<p>Displays one of the following:</p> <table border="0"> <tr> <td>Ready</td> <td>The index is up-to-date.</td> </tr> <tr> <td>Scheduled</td> <td>Reindexing is scheduled to take place.</td> </tr> <tr> <td>Running</td> <td>Reindexing is currently running.</td> </tr> <tr> <td>Reindex Required</td> <td>A change has been made that requires reindexing, but the indexers cannot be updated automatically. Check to see if cron is available and configured correctly.</td> </tr> </table>	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.
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.								

Indexing 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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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

Full Reindex Triggers (cont.)

INDEXER	EVENT						
Catalog Product Flat Indexer	Create a new web store Create a new web store view Create, or delete an attribute that is any of the following: <ul style="list-style-type: none"> • 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						
Stock status indexer	When the following Catalog Inventory options change in the system configuration: <table border="0" style="margin-left: 40px;"> <tr> <td>Stock Options</td> <td>Display Out of Stock Products</td> </tr> <tr> <td>Product Stock Options</td> <td>Manage Stock</td> </tr> </table>	Stock Options	Display Out of Stock Products	Product Stock Options	Manage Stock		
Stock Options	Display Out of Stock Products						
Product Stock Options	Manage Stock						
Price Indexer	Adding a new customer group. When any of the following Catalog Inventory options change in the system configuration: <table border="0" style="margin-left: 40px;"> <tr> <td>Stock Options</td> <td>Display Out of Stock Products</td> </tr> <tr> <td>Product Stock Options</td> <td>Manage Stock</td> </tr> <tr> <td>Price</td> <td>Catalog Price Scope</td> </tr> </table>	Stock Options	Display Out of Stock Products	Product Stock Options	Manage Stock	Price	Catalog Price Scope
Stock Options	Display Out of Stock Products						
Product Stock Options	Manage Stock						
Price	Catalog Price Scope						
Category or Product Indexer	Create or delete a store view Delete a store Delete a website						

Cron (Scheduled Tasks)

Magento performs some operations on schedule by periodically running a script. You can control the execution and scheduling of Magento cron jobs from the Admin. Store operations that run according to a cron schedule include:


- [Email](#)
- [Catalog Price Rules](#)
- [Newsletters](#)
- [XML Sitemap Generation](#)
- [Currency Rate Updates](#)

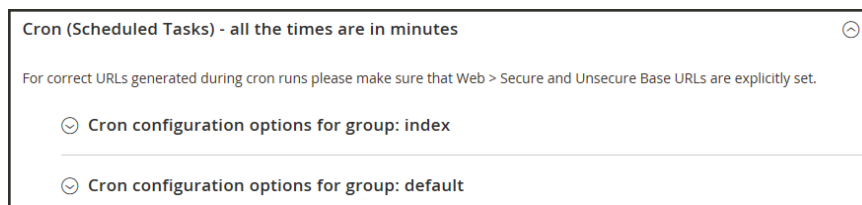
In addition, you can configure the following to run according to a cron schedule:

- Order System Grid Updates and Reindexing
- Pending Payment Lifetime

Make sure that the [base URLs](#) for the store are set correctly, so the URLs that are generated during cron operations are correct. To learn more, see: [Setting Up Cron Jobs](#).

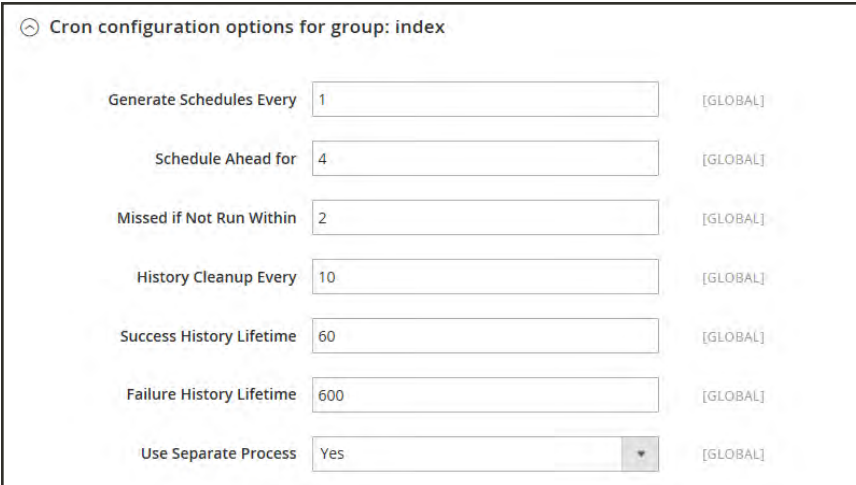
To configure cron:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **System**.
3. Expand  the **Cron** section.



Cron (Scheduled Tasks)

4. Then, complete the following settings for the **Index** and **Default** groups. The settings are the same in each section.
- Generate Schedules Every
 - Schedule Ahead for
 - Missed if not Run Within
 - History Cleanup Every
 - Success History Lifetime
 - Failure History Lifetime
 - Use Separate Process



⊖ Cron configuration options for group: index

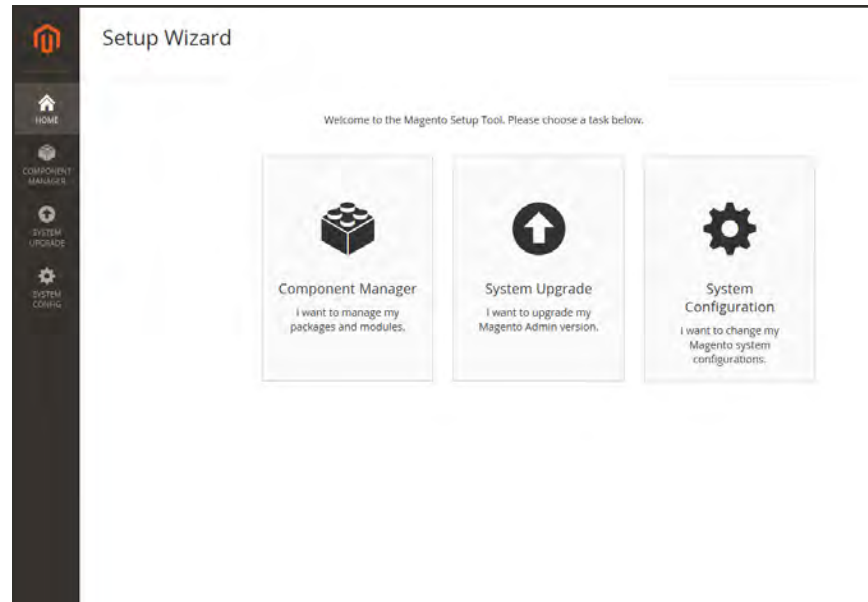
Generate Schedules Every	<input type="text" value="1"/>	[GLOBAL]
Schedule Ahead for	<input type="text" value="4"/>	[GLOBAL]
Missed if Not Run Within	<input type="text" value="2"/>	[GLOBAL]
History Cleanup Every	<input type="text" value="10"/>	[GLOBAL]
Success History Lifetime	<input type="text" value="60"/>	[GLOBAL]
Failure History Lifetime	<input type="text" value="600"/>	[GLOBAL]
Use Separate Process	<input type="text" value="Yes"/>	[GLOBAL]

Cron Configuration for Group: Index

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

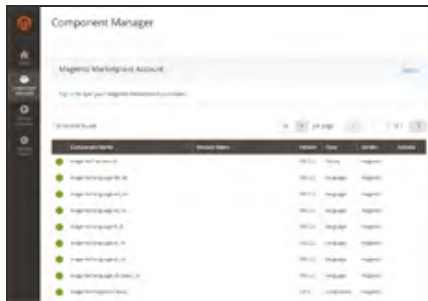
Web Setup Wizard

The Setup Wizard can be used to upgrade your Magento installation, manage Magento Marketplace extensions, and update the system configuration.



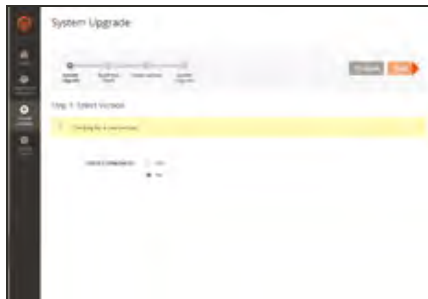
Web Setup Wizard

Setup Tools



Component Manager

Component Manager lists each component that is currently installed, and can be used to synchronize any extensions you have purchased from Magento Marketplace with your system.



System Upgrade

The System Upgrade tool can be used to upgrade your installation of Magento. During the process, it checks your system for readiness, creates a backup, and then upgrades your system.



System Config

The System Config tool can be synchronized with your Marketplace account, based on your public and private access keys.

Web Setup

The Web Setup setup is the second part of the Magento installation that checks system readiness, establishes the database connection, and creates the initial Admin account. The Magento setup can be rerun at any time from the System menu.



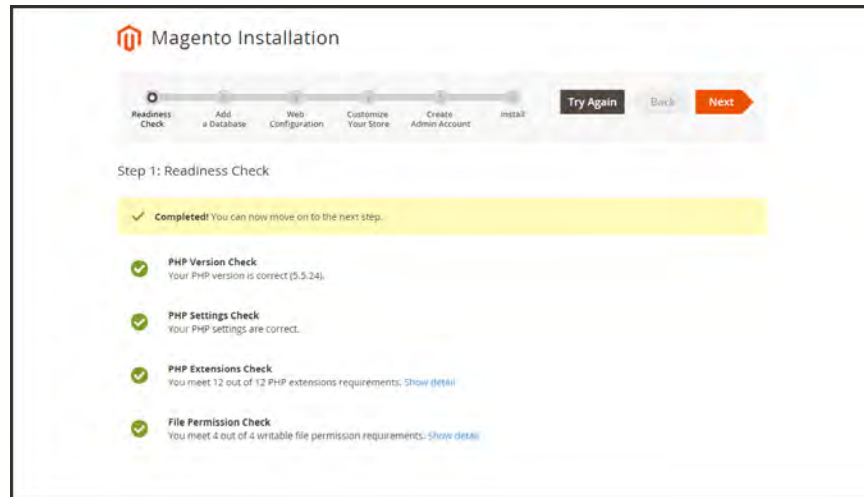
Magento Setup

To launch Magento Setup:

1. On the Admin sidebar, tap **System**. Then under Tools, choose **Web Setup Wizard**.
2. Read the **Terms & Agreement**. If you agree, tap **Agree and Setup Magento** to continue.

Step 1: Readiness Check

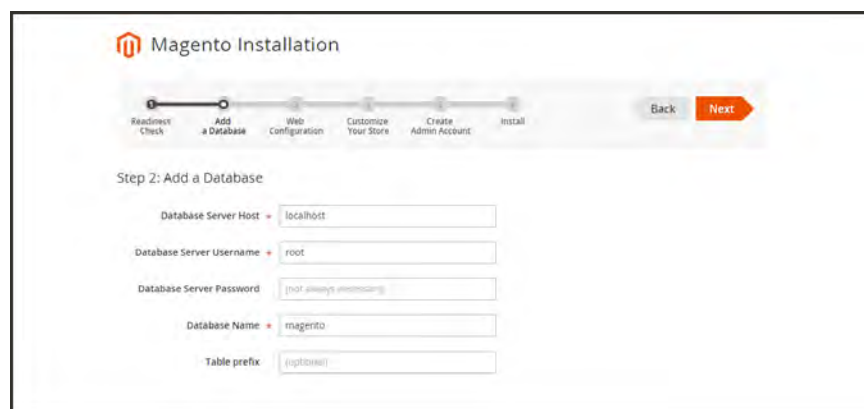
1. To verify that your system meets the system requirements, tap **Start Readiness Check**.
2. When the results appear, tap **Details** for more information. Then, do one of the following;
 - If your system fails the readiness check, correct the issue and tap **Try Again**.
 - If your system meets the requirements, tap **Next**.



Readiness Check


Step 2: Add a Database

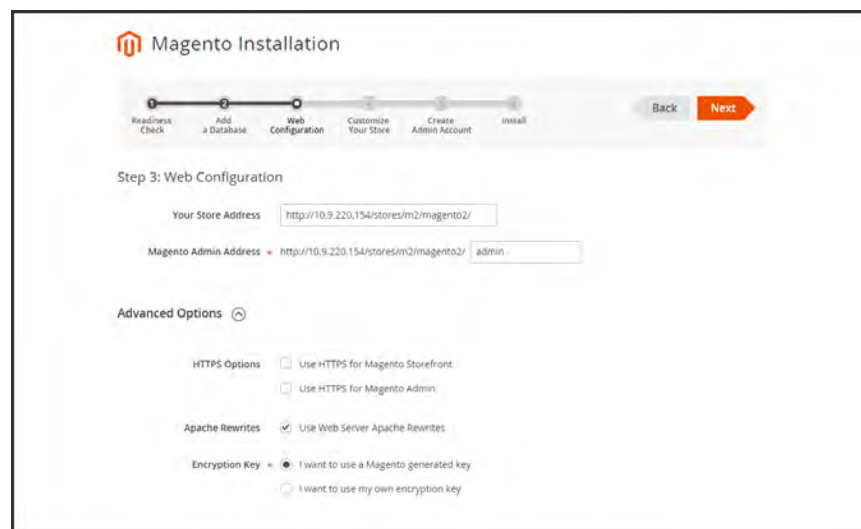
1. To change the MySQL database or update the credentials, do the following:
 - a. Enter the **Database Server Host**. If the database resides on the same server as the Magento code, enter “localhost.”
 - b. Enter the **Database Server Username**.
 - c. Enter the **Database Server Password**.
 - d. Enter the **Database Name**.
 - e. If applicable, enter the **Table prefix**.
2. When complete, tap **Next**. Your credentials must be correct to continue to the next step.



Add a Database

Step 3: Web Configuration

1. Under Web Configuration, do the following:
 - a. In the **Your Store Address** field, enter the full URL of your Magento store.
 - b. In the **Magento Admin Address** field, enter the full URL of the Magento Admin.
2. Expand  the **Advanced Options**, and do the following:
 - a. Mark the checkbox of the **HTTPS Options** that apply to your system:
 - Use HTTPS for Magento Storefront
 - Use HTTPS for Magento Admin
 - b. To enable your server to use **Apache Rewrites**, mark the checkbox.
 - c. Mark the checkbox of the **Encryption Key** setting that applies to your system:
 - I want to use a Magento generated key.
 - I want to use my own encryption key.

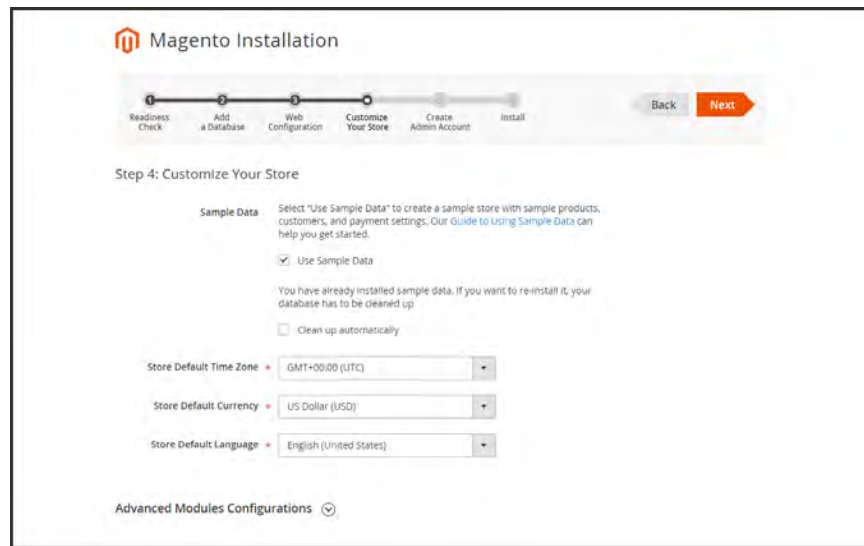


Web Configuration


Step 4: Customize Your Store

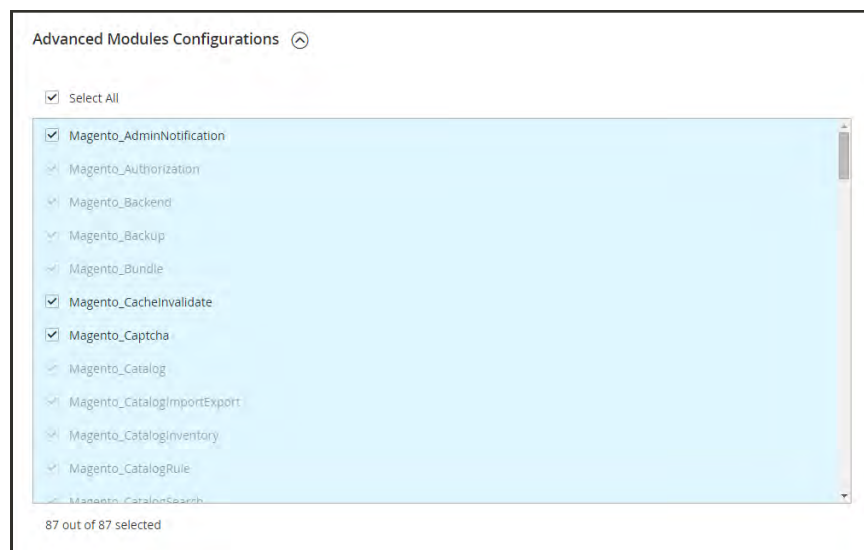
1. To install or reinstall the **Sample Data**, do the following:
 - a. To create a sample store with sample products, mark the **Use Sample Data** checkbox.
 - b. If you are reinstalling the sample data, also mark the **Clean up automatically** checkbox.
2. Set **Store Default Time Zone** to the correct time zone for your locale.
3. Set **Store Default Currency** to the default currency that you accept as payment.

4. Set **Store Default Language** to the primary language of your store.



Customize Your Store

5. (Optional) Expand  the **Advanced Modules Configuration**, and do the following:
 - a. To install only specific modules, clear the **Select All** checkbox.
 - b. In the list, select the checkbox of each module you want to install.

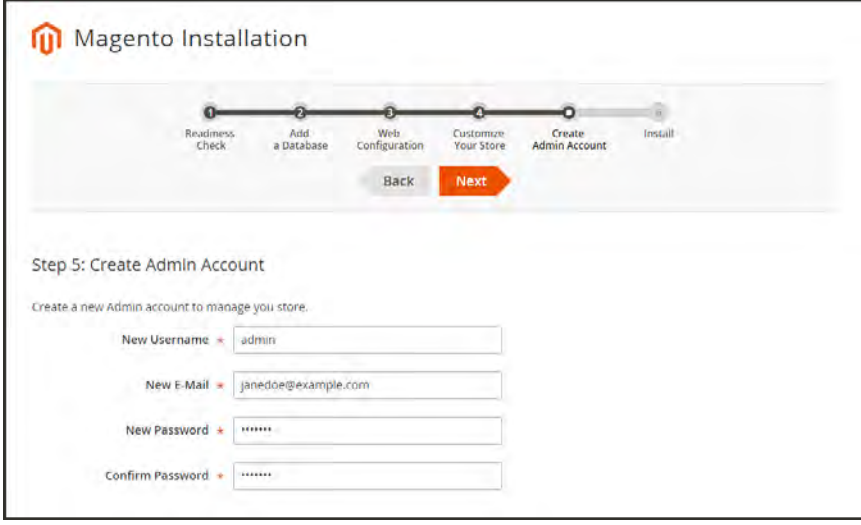


Advanced Modules Configuration

6. When complete, tap **Next**.

Step 5: Create Admin Account

1. Enter a **New Username** for the Admin account.
2. Enter a **New E-Mail** for the Admin account.
3. Enter a **New Password** for the Admin account. Then in the **Confirm Password** field, enter your new password again.
4. When complete, tap **Next**.



The screenshot shows the 'Step 5: Create Admin Account' screen in the Magento Installation wizard. At the top, a progress bar indicates the current step (5) and the next step (6). Below the progress bar, there are four buttons: 'Back' and 'Next'. The main content area contains the following text and form fields:

Step 5: Create Admin Account

Create a new Admin account to manage your store.

New Username *

New E-Mail *

New Password *

Confirm Password *

Create Admin Account

Step 6: Install

1. When you are ready to complete the setup, tap **Install Now**.



The screenshot shows the 'Step 6: Install' screen in the Magento Installation wizard. At the top, a progress bar indicates the current step (6) and the next step (7). Below the progress bar, there are two buttons: 'Back' and 'Next'. The main content area contains the following text and a button:

Step 6: Install

You're ready!

Install

2. When the installation completes, a page appears with your Magento Admin and database credentials, but without the passwords. You can print the page and keep it for your records. Then, do the following:
 - Launch Magento Storefront
 - Launch Magento Admin
3. If the installation fails to complete, view the **Console Log** to learn more. Then, correct the problem and try again.

A little Housekeeping

After Setup is complete, do the following to set the recommended permissions for all files and folders in your Magento2 installation:

1. Change to the Web user who has full permissions to the Magento2 folder. (For example, apache or root.)

```
su - apache
```

2. Change directories to the Magento2 folder, and set the following permissions. You can copy the code, and paste it as a single command.

```
find . -type d -exec chmod 700 {} \; && find . -type f -exec chmod 600 {} \; && chmod +x bin/magento
```

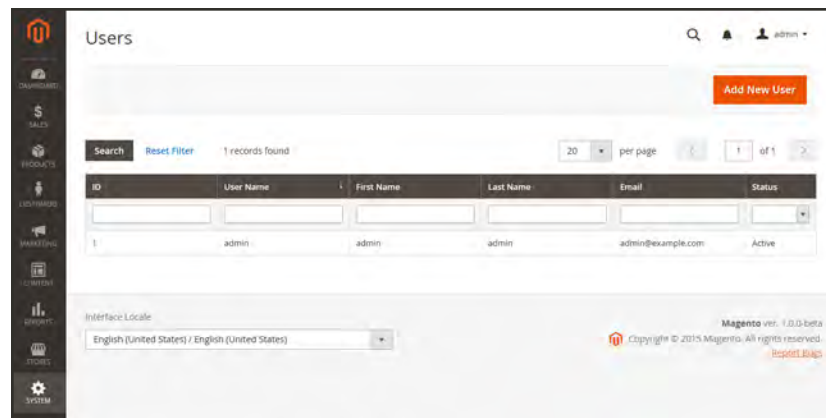

CHAPTER 72:

Permissions

Magento uses roles and permissions to create different levels of access to the Admin. When your store is first set up, you receive a set of login credentials for the Administrator role that has full permissions. However, you can restrict the level of permissions on a “need to know” basis for other people who work on your site. For example, a designer can be given access to only the Design tools, but not to areas with customer and order information.

In addition, you can further restrict Admin access to only a specific site, or set of sites and their associated data. If you have multiple brands or business units with separate stores on the same Magento installation, you can provide Admin access to each of your business units but hide and protect their data from other Admin users.

If an Admin user’s access is restricted to specific websites and/or stores, the websites and stores for which they are not authorized will either not be visible to them, or grayed-out as inactive. Only the sales and other data for permitted websites and stores is shown.



All Users

Adding Users

When your store is first installed, your login credentials give you full administrative access. As a best practice, one of the first things you should do is to create another user account with full Administrator permissions. That way, you can use one account for your everyday Administrative activities, and reserve the other as a “Super Admin” account in case you forget your regular credentials or they somehow become unusable.

If there are others on your team, or service providers who need access, you can create a separate user account for each, and assign restricted access. To limit the websites or stores that admin users can access when they log in, you must first create a role with limited scope and access to resources. Then, you can assign the role to a specific user account. Admin users who are assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot make changes to any global settings or data.

Step 1: Create a New User

1. On the Admin sidebar tap **System**. Then under **Permissions**, choose **All Users**.
2. In the upper-right corner, tap **Add New User**.
3. In the Account Information section, do the following:

The screenshot shows the 'New User' form in the Magento Admin interface. The form is divided into two main sections: 'USER INFORMATION' and 'Account Information'. The 'USER INFORMATION' section has a sidebar with 'User Info' and 'User Role'. The 'Account Information' section contains fields for 'User Name', 'First Name', 'Last Name', 'Email', 'Password', and 'Password Confirmation'. There is also a dropdown for 'Interface Locale' set to 'English (United States) / English (United States)'. At the bottom, there are two dropdowns for 'This account is' both set to 'Active'. Navigation buttons 'Back', 'Reset', and 'Save User' are visible at the top right.

New User Account Information

- a. Enter the **User Name** for account.

The User Name should be easy to remember. It is not case-sensitive. For example, if your user name is “John,” you can also log in as “john.”

- b. Complete the following information:

- First Name
- Last Name
- Email address

This email address must be different from the one that is associated with your original Admin account.

- c. Assign a **Password** to the account.

The password should be seven or more characters long, and include both letters and numbers.

- d. In the **Password Confirmation** box, repeat the password to make sure it was entered correctly.

- e. If your store has multiple languages, set **Interface Locale** to the language to be used for the Admin interface.

4. Set **This Account is** to “Active.”

5. Under Current User Identity Verification, enter **Your Password**.

Current User Identity Verification

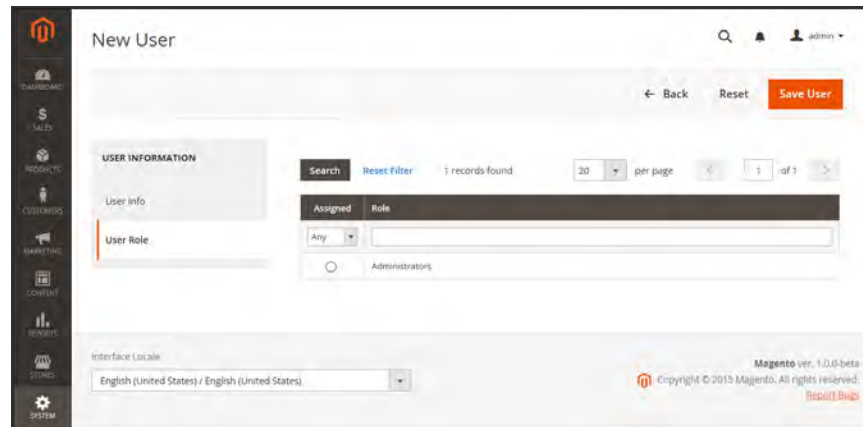
Your Password *

Current User Identity Verification

Step 2: Define the Role

1. In the panel on the left, choose **User Role**. The grid lists all the existing roles. Initially, the only role available is Administrators.
2. In the Assigned column, select the **Administrators** option.
3. Tap **Save User**.

You now have two accounts with Administrator access.

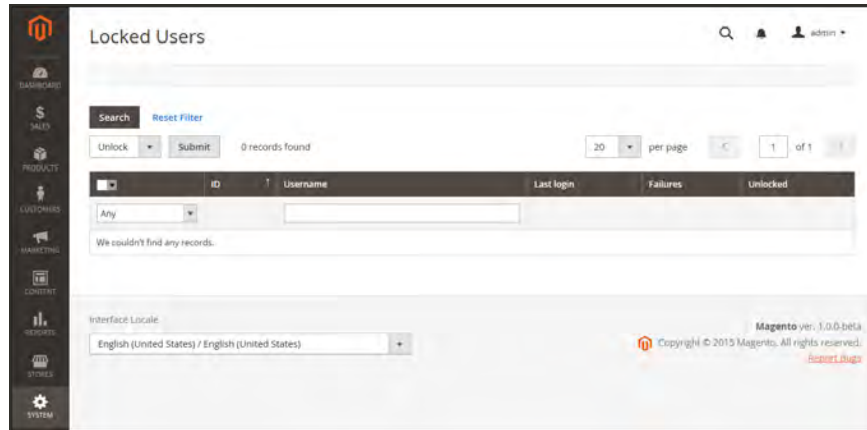


Add New User Role

Locked Users

For the security of your business, user accounts are locked after six failed attempts to log in to the Admin. Any user account that is currently locked appears in the grid. The account can be unlocked by any other user with full Administrator permissions.

In the configuration, you can set the maximum number of times an Admin user can try to login before the account is locked. To learn more, see: [Configuring Admin Security](#).



To unlock an admin account:

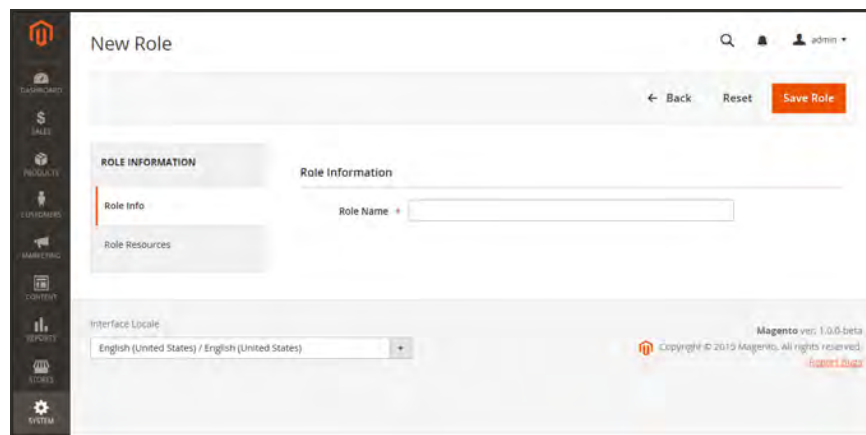
1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **Locked Users**.
2. In the grid, mark the checkbox of the locked account.
3. In the upper-left corner, set the **Actions** control to “Unlock.”
4. Tap **Submit** to unlock the user account.

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. The role can have varying levels of permissions to the following resources:

- Price Resources
- Promotion Resources
- Product Resources

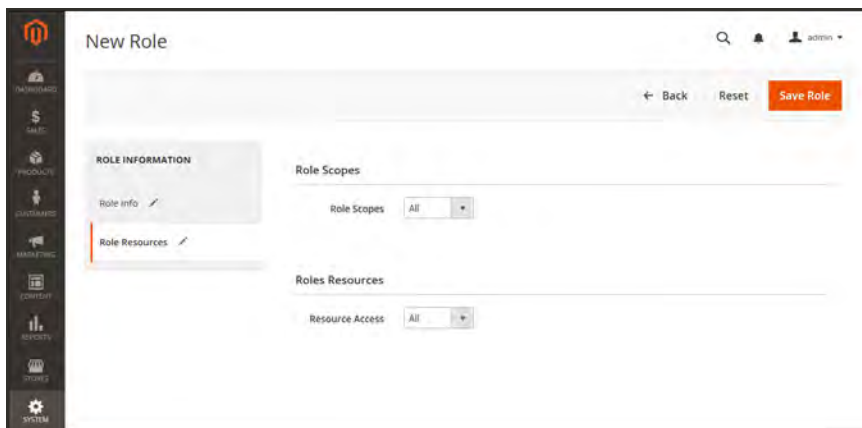
After the role is established you can add new users and assign the restricted role to grant them limited access to the Admin.



Role Name

To define a role:

1. On the Admin sidebar, tap **System**. Then under **Permissions**, choose **User Roles**.
2. In the upper-left corner, tap **Add New Role**.
3. In the Role Information section, enter a descriptive **Role Name**.
4. In the panel on the left, choose **Role Resources**.

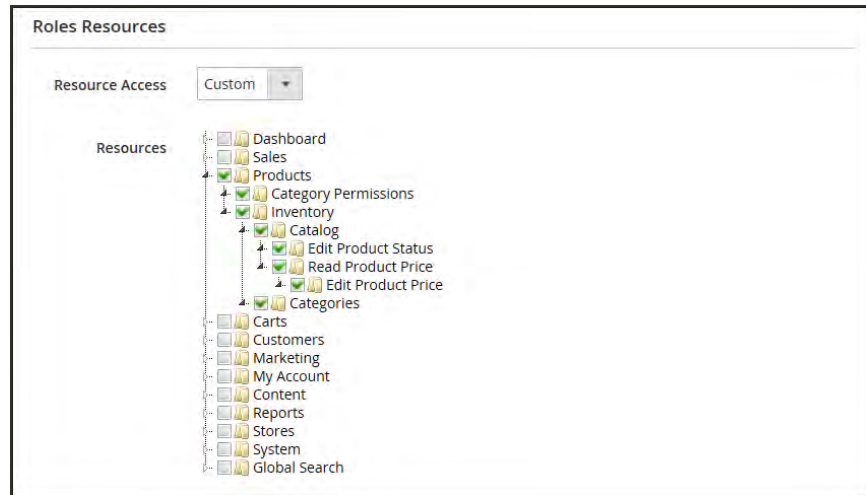


Role Scopes

5. Under Role Scopes , set **Role Scopes** to “Custom.” Then, mark the checkbox of each website and view to which the role is to have permission to access.
6. In the Roles Resources tree, mark the checkbox of each Admin **Resource** that you want the role to be able to access.

In the tree, the color of each node changes from white to gray each time the section is expanded or collapsed. If the node is collapsed, you can click the node to show additional resources.

Important! Be sure to disable access to the Permissions tool if you are limiting access for a given role. Otherwise, users will be able to modify their own permissions.



Role Resources Assigned

7. (Optional) In the panel on the left, choose **Role Users**. Then, assign additional Administrator user accounts to the new role.
8. When complete, tap **Save Role**.

The role now appears in the grid, and can be assigned to new user accounts.



CHAPTER 73:

Security

In this section of the guide, you will learn security best practices, how to manage Admin sessions and credentials, implement CAPTCHA, and manage website restrictions.

- [Security Best Practices](#)
- [Configuring Admin Security](#)
- [CAPTCHA](#)
- [Encryption Key](#)
- [Browser Capabilities Detection](#)
- [Action Log](#)

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.

Advanced Techniques (cont.)





To disable the Magento Connect downloader on the production site, either remove or block access to the `/downloader` directory. You can also use the same [whitelisting](#) methods.

-  Use two-factor authorization for Admin logins. There are several extensions available that provide additional security by requiring an additional passcode that is generated on your phone, or a token from a special device.
-  Review your server for “development leftovers.” Make sure there are no accessible log files, publicly visible `.git` directories, tunnels to execute SQL, database dumps, `phpinfo` files, or any other unprotected files that are not required, and that might be used in an attack.
-  Limit outgoing connections to only those that are required, such as for a payment integration.
-  Use a Web Application Firewall to analyze traffic and discover suspicious patterns, such as credit card information being sent to an attacker.

Server Applications

-  Make sure that all applications running on the server are secure.
-  Avoid running other software on the same server as Magento, especially if it is accessible from the Internet. Vulnerabilities in blog applications such as Wordpress can expose private information from Magento. Install such software on a separate server or virtual machine.
-  Keep all software up to date, and apply patches as recommended.

Admin Desktop Environment

-  Make sure that the computer that is used to access the Magento Admin is secure.
-  Keep your antivirus software up to date, and use a malware scanner. Do not install any unknown programs, or click suspicious links.
-  Use a strong password to log in to the computer, and change it periodically. Use a password manager such as [LasstPass](#), [1Password](#), or [Dashlane](#) to create and manage secure, unique passwords.
-  Do not save FTP passwords in FTP programs, because they are often harvested by malware and used to infect servers.

Protect Magento

Your effort to protect your Magento installation starts with the initial setup, and continues with the security-related configuration settings, password management, and ongoing maintenance.

Your Magento Installation



Use the latest version of Magento to ensure that your installation includes the most recent security enhancements.

If for any reason you cannot upgrade to the latest version, make sure to install all security patches as recommended by Magento. Although Magento issues security patches to fix major issues, new product releases include additional improvements to help secure the site.



Use a unique, [custom Admin URL](#) instead of the default “admin” or the often-used “backend.” Although it will not directly protect your site from a determined attacker, it can reduce exposure to scripts that try to break into every Magento site. (Never leave your valuables in plain sight.)

Check with your hosting provider before implementing a custom Admin URL. Some hosting providers require a standard URL to meet firewall protection rules.



Block access to any development, staging, or testing systems. Use IP [whitelisting](#) and `.htaccess` password protection. When compromised, such systems can produce a data leak or be used to attack the production system.



Use the correct file permissions. Core Magento and directory files should be set to ready only, including `app/etc/local.xml` files.






Use a strong password for the Magento Admin. To learn more, see: [Creating a strong password](#).






Take advantage of Magento’s security-related configuration settings for [Admin Security](#), [Password Options](#), and [CAPTCHA](#).

Don't be Taken for a Ride

-  Install extensions only from trusted sources. Never use paid extensions that are published on torrent or other sites. If possible, review extensions for security issues before installing them.
-  Do not click suspicious links, or open suspicious email.
-  Do not disclose the password to your server or to the Magento Admin, unless you are required to do so.







Be Prepared!

-  Develop a disaster recovery/business continuity plan. Even a basic plan will help you get back on track in the event of a problem.
-  Ensure that your server and database are automatically backed up to external location. A typical setup requires daily incremental backups, with a full backup on a weekly basis. Make sure to test the backup regularly to verify that it can be restored.
-  For a large site, simple text file dumps of the database take an unacceptable amount of time to restore. Work with your hosting provider to deploy a professional database backup solution.

Monitor for Signs of Attack

If your system is not immediately patched after a major security breach, there is a high probability that your site is already compromised. Complete a security review periodically to check for signs of attack, and also when contacted by customers with security-related concerns.

Security Review

-  Check periodically for unauthorized Admin users.
-  (Magento Enterprise only) Check the [Admin Actions Log](#) for suspicious activity.
-  Use automated log review tools such as [Apache Scalp](#).
-  Work with your hosting provider to review server logs for suspicious activity, and to implement an Intrusion Detection System (IDS) on your network.
-  Use a file and data integrity checking tool such as [TripWire](#) to receive notification of any potential malware installation.
-  Monitor all system logins (FTP, SSH) for unexpected activity, uploads, or commands.

Follow Your Disaster Recovery Plan

In the event of a compromise, work with your internal IT security team if available, or hosting provider, and system integrator to determine the scope of the attack. Taking into consideration the type of compromise and the size of the store. Then, adjust the following recommendations to your business needs.

1. Block access to the site, so the attacker cannot remove evidence or steal more information.
2. Backup the current site, which will include evidence of the installed malware or compromised files.
3. Try to determine the scope of the attack. Was credit card information accessed? What information was stolen? How much time has elapsed since the compromise? Was the information encrypted? Typically you can expect the following types of attack:

Defacing of Site	Site access is compromised, but often the payments information is not. User accounts might be compromised.
Botnetting	Your site becomes part of a botnet that sends spam email. Although data is probably not compromised, your server is blacklisted by spam filters which prevents email that you send to customers from being delivered.
Direct Attack on Server	Data is compromised, backdoors and malware are installed, and the site no longer works. Payment information—provided that it is not stored on the server— is probably safe.
Silent Card Capture	In this most disastrous attack, intruders install hidden malware or card capture software, or possibly modify the checkout process to collect and send out credit card data. Such attacks can go unnoticed for extended periods of time, and result in major compromise of customer accounts and financial information.

4. Try to find the attack vector to determine how the site was compromised, and when. Review server log files and file changes. Note that sometimes there are multiple different attacks on the same system.
5. If possible, wipe and reinstall everything. In case of virtual hosting, create a new instance. Malware might be hidden in an unsuspected location, just waiting to restore itself. Remove all unnecessary files. Then, reinstall all required files from a known, clean source such as files from your own version control system, or the original distribution files from magento.com.
6. Apply all the latest security patches necessary.
7. Reset all credentials, including the database, file access, payment and shipping integrations, web services, and Admin login.

8. If payment information was compromised, it might be necessary to inform your payment processor.
9. Inform your customers about the attack and the type of information affected. If payment information was compromised, they should look for unauthorized transactions. If personal information, including email addresses was compromised, they might be targeted with phishing attacks or spam.

Acknowledgments

Parts of this article were inspired by real-world solutions that were shared by community members. The resulting article incorporates content from the community, with input from our team.

- Bryan (BJ) Hoffpauir for sharing his insight on the Magento forum, and for contributing recommendations in the Attack Response Plan section of this article. See the [original post](#) by [beejhuff](#) for more information.
- Anna Völkl (@rescueann), Magento developer at LimeSoda.
- Robert Mangiafico (@robfico) CTO at LexiConn.
- @dracony_gimp for his security presentation, [Being Hacked is Not Fun](#).
- Willem de Groot for providing a sample [Nginx configuration](#).

Configuring Admin Security

For increased security, you can configure the length of keyboard inactivity before the current session expires, and require the user name and password to be case-sensitive. For additional security, the Admin login can be configured to require a **CAPTCHA**.

Security ⊖

Add Secret Key to URLs	<input type="text" value="No"/>	[GLOBAL]
Login is Case Sensitive	<input type="text" value="No"/>	[GLOBAL]
Admin Session Lifetime (seconds)	<input type="text" value="900000"/>	[GLOBAL]
	<small>Values less than 60 are ignored.</small>	
Maximum Login Failures to Lockout Account	<input type="text" value="6"/>	[GLOBAL]
	<small>We will disable this feature if the value is empty.</small>	
Lockout Time (minutes)	<input type="text" value="30"/>	[GLOBAL]
Password Lifetime (days)	<input type="text" value="90"/>	[GLOBAL]
	<small>We will disable this feature if the value is empty.</small>	
Password Change	<input type="text" value="Forced"/>	[GLOBAL]

Security

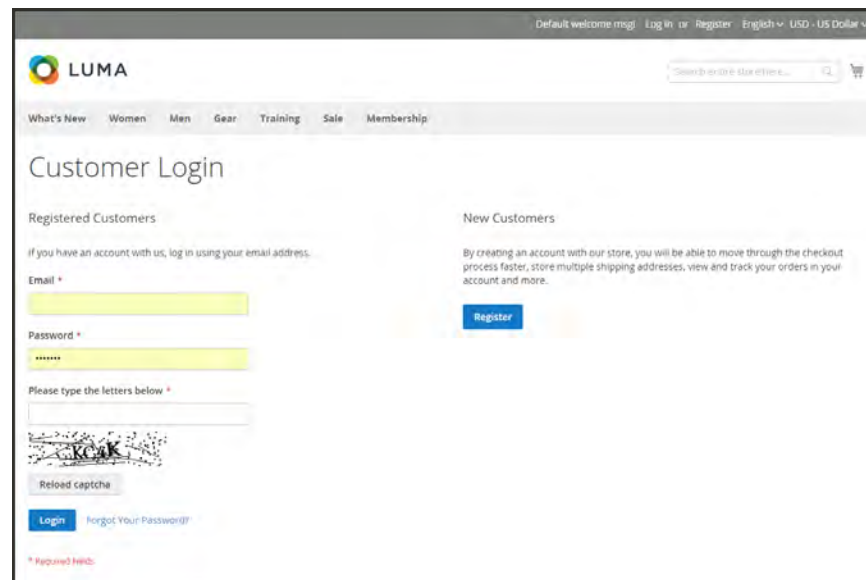
To configure Admin security:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**. Then, do the following:
 - a. To append secret key to the Admin URL to protect against exploits, set **Add Secret Key to URLs** to “Yes.” This setting is enabled by default.
 - b. To require the user name and password to have the same upper-and lowercase characters as those that are saved in the system, set **Login is Case Sensitive** to “Yes.”
 - c. To require Admin users to sign in again after a period of keyboard inactivity, set **Admin Session Lifetime (seconds)** to a number greater than 60. To not set a limit on the length of a session, leave the field blank.
 - d. In the **Maximum Login Failures to Lockout Account** field, enter the number of times Admin users can try to log in before their accounts are locked.
 - e. In the **Lockout Time (minutes)** field, enter the number of minutes an Admin account is locked before the user can try to log in again.
 - f. In the **Password Lifetime (days)** field, enter the number of days an Admin password can be used before it expires.
 - g. If you want to require Admin users to change their passwords before they expire, set **Password Change** to “Forced.”
3. When complete, tap **Save Config**.

CAPTCHA


A CAPTCHA is a visual device that ensures that a human being, rather than a computer, is interacting with the site. CAPTCHA is an acronym for “Completely Automated Public Turing test to tell Computers and Humans Apart,” and can be used for both Admin and customer account logins.

You can reload the CAPTCHA as many times as is necessary by clicking the Reload icon in the upper-right corner of the image. The CAPTCHA is fully configurable and can be set appear every time, or only after a number of failed login attempts.

The screenshot shows the LUMA website's Customer Login page. At the top, there is a navigation bar with the LUMA logo, a search bar, and a shopping cart icon. Below the navigation bar, there are links for 'What's New', 'Women', 'Men', 'Gear', 'Training', 'Sale', and 'Membership'. The main heading is 'Customer Login'. Underneath, there are two columns: 'Registered Customers' and 'New Customers'. The 'Registered Customers' section has a text prompt 'if you have an account with us, log in using your email address.' followed by input fields for 'Email *' and 'Password *'. Below these is a CAPTCHA challenge with the text 'Please type the letters below *' and a distorted image of letters. A 'Reload captcha' button is located below the CAPTCHA image. At the bottom of the form, there is a 'Login' button and a link for 'Forgot Your Password?'. The 'New Customers' section has a text prompt 'By creating an account with our store, you will be able to move through the checkout process faster, store multiple shipping addresses, view and track your orders in your account and more.' and a 'Register' button. The top right corner of the page shows user information: 'Default welcome msg!', 'Log in or Register', 'English', and 'USD - US Dollar'.

Customer Login with CAPTCHA


Admin CAPTCHA

For an extra level of security, you can add a CAPTCHA to the Admin Sign In and Forgot Password page. Administrator users can reload the displayed CAPTCHA by clicking the Reload  icon in the upper-right corner of the image. The number of reloads is unlimited.



Admin Sign In with CAPTCHA

To configure an Admin CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Advanced**, choose **Admin**.
3. In the upper-right corner, set **Store View** to “Default.”
4. Expand  the **CAPTCHA** section, and do the following:

- a. Set **Enable CAPTCHA in Admin** to “Yes.”
- b. Enter the name of the Font to be used for the CAPTCHA symbols. Default font: `LinLibertine`

To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the `config.xml` file of the Captcha module.

- c. Select the **Forms** where the CAPTCHA is to be used:
 - Admin Login
 - Admin Forgot Password
- d. Set **Displaying Mode** to one of the following:

Always CAPTCHA is always required to log in the Admin.

After When selected displays the Number of Unsuccessful Attempts to Login field.

number Enter the number of login attempts allowed. A value of 0 (zero) is similar to of setting Displaying Mode to Always. This option does not cover the Forgot attempts Password form. If CAPTCHA is enabled and set to be appear on this form, then to login 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...**

CAPTCHA

Enable CAPTCHA in Admin	<input type="text" value="Yes"/>	[GLOBAL]
Font	<input type="text" value="LinLibertine"/>	[GLOBAL]
Forms	<input type="text" value="Admin Login"/> <input type="text" value="Admin Forgot Password"/>	[GLOBAL]
Displaying Mode	<input type="text" value="After number of attempts to login"/>	[GLOBAL]
Number of Unsuccessful Attempts to Login	<input type="text" value="3"/> <small>If 0 is specified, CAPTCHA on the Login form will be always available.</small>	[GLOBAL]
CAPTCHA Timeout (minutes)	<input type="text" value="7"/>	[GLOBAL]
Number of Symbols	<input type="text" value="4-5"/> <small>Please specify 8 symbols at the most. Range allowed (e.g. 3-5)</small>	[GLOBAL]
Symbols Used in CAPTCHA	<input type="text" value="ABCDEFGHIJKLMNOPQRSTUVWXYZ23456789"/> <small>Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "l", "1", "1") decrease chance of correct recognition by customer.</small>	[GLOBAL]
Case Sensitive	<input type="text" value="No"/>	[GLOBAL]

Admin CAPTCHA Configuration

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

CAPTCHA

Enable CAPTCHA on Frontend	<input type="text" value="Yes"/>	[WEBSITE]
Font	<input type="text" value="LinLibertine"/>	[WEBSITE]
Forms	<div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> Create user Login Forgot password Checkout as Guest Register during Checkout Contact Us </div>	[WEBSITE]
<small>CAPTCHA for "Create user" and "Forgot password" forms is always enabled if chosen.</small>		
Displaying Mode	<input type="text" value="Always"/>	[WEBSITE]
CAPTCHA Timeout (minutes)	<input type="text" value="7"/>	[WEBSITE]
Number of Symbols	<input type="text" value="4-5"/>	[WEBSITE]
<small>Please specify 8 symbols at the most. Range allowed (e.g. 3-5)</small>		
Symbols Used in CAPTCHA	<input type="text" value="ABCDEFGHIJKLMNOPQRSTUVWXYZ23456789"/>	[WEBSITE]
<small>Please use only letters (a-z or A-Z) or numbers (0-9) in this field. No spaces or other characters are allowed. Similar looking characters (e.g. "l", "1", "1") decrease chance of correct recognition by customer.</small>		
Case Sensitive	<input type="text" value="No"/>	[WEBSITE]

Customer CAPTCHA Configuration

To configure a Storefront CAPTCHA:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left, under **Customers**, choose **Customer Configuration**.
3. Expand ☾ the **CAPTCHA** section, and do the following:

- a. Set **Enable CAPTCHA on Frontend** to “Yes.”
- b. Enter the name of the Font to be used for the CAPTCHA symbols.

To add your own font, the font file must reside in the same directory as your Magento instance, and be declared in the `config.xml` file of the CAPTCHA module.

- c. Choose one of the following **Forms** where CAPTCHA is to be used.
 - Create User
 - Login
 - Forgot Password
 - Checkout as Guest
 - Register during Checkout

- d. Set **Displaying Mode** to one of the following:

Always CAPTCHA is always required to access the selected form(s).

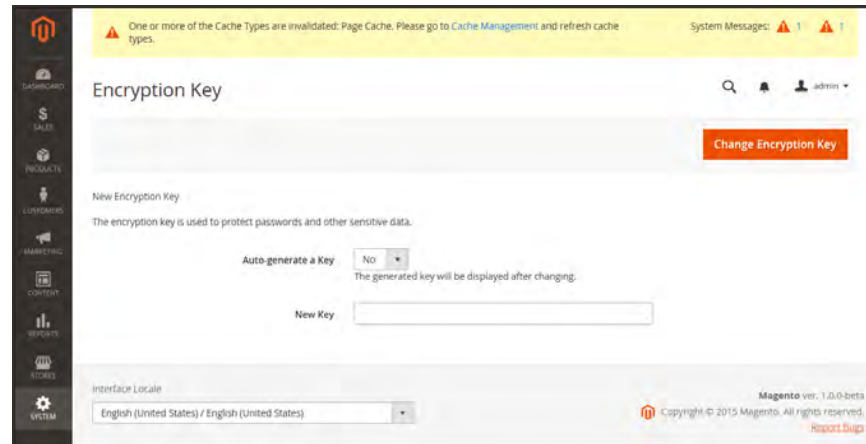
After number of attempts to unsuccessful login Enter the number of login attempts before the CAPTCHA appears. A value of 0 (zero) is similar to “Always.” When selected, the number of attempts to unsuccessful login appears.

login This option does not apply to the Forgot Password form, which always display the CAPTCHA, if enabled,

- e. Enter the **Number of Unsuccessful Attempts to Login** before the CAPTCHA appears. If set to zero, the CAPTCHA is always used.
 - f. In the **CAPTCHA Timeout (minutes)** field, enter the number of minutes before the CAPTCHA expires. When the CAPTCHA expires, the user must reload the page to generate a new CAPTCHA.
 - g. Enter the **Number of Symbols** in the CAPTCHA, up to eight. For a variable number of symbols that change with each CAPTCHA, enter a range such as 5-8.
 - h. In the **Symbols Used in CAPTCHA** field, specify the symbols that can be used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of characters does not include similar symbols such as I or 1. For best results, use symbols that users can readily identify.
 - i. To require that the user enter the upper-and lowercase characters exactly as shown set **Case Sensitive** to “Yes.”
4. When complete, tap **Save Config**.

Encryption Key

The encryption key is used to protect passwords and other sensitive data. During the **Magento setup**, you have the option to generate an encryption key, or use another.




Encryption Key

To change the encryption key:

1. On the Admin sidebar, tap **System**. Then under **Other Settings**, choose **Manage Encryption Key**.
2. Set Auto-generate Key to “Yes.”
3. Tap **Change Encryption Key**.

Session Validation

Magento Community 2.0 allows you to validate session variables as a protective measure against possible session fixation attacks, or attempts to poison or hijack user sessions. The Session Validation Settings determine how session variables are validated during each store visit, and if the session ID is included in the URL of the store.



Setting	Value	Scope
Validate REMOTE_ADDR	No	[GLOBAL]
Validate HTTP_VIA	No	[GLOBAL]
Validate HTTP_X_FORWARDED_FOR	No	[GLOBAL]
Validate HTTP_USER_AGENT	No	[GLOBAL]
Use SID on Storefront	Yes	[WEBSITE]


Allows customers to stay logged in when switching between different stores.

Session Validation Settings

The validation checks to see that visitors are who they say they are by comparing the value in the validation variables against the session data that is already stored in `$_SESSION` data for the user. Validation fails if the information is not transmitted as expected, and the corresponding variable is empty. Depending on the session validation settings, if a session variable fails the validation process, the client session immediately terminates.

Enabling all of the validation variables can help prevent attacks, but might also impact the performance of the server. By default, all session variable validation is disabled. We recommend that you experiment with the settings to find the best combination for your Magento installation. Activating all of the validation variables might prove to be unduly restrictive, and prevent access to customers who have Internet connections that pass through a proxy server, or that originate from behind a firewall. To learn more about session variables and their use, see the system administration documentation for your Linux system.

To configure the Session Validation Settings:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand  the **Session Validation Settings** section. Then, do the following:
 - a. To verify that the IP address of a request matches what is stored in the `$_SESSION` variable, set **Validate REMOTE_ADDR** to “Yes.”
 - b. To verify that the proxy address of an incoming request matches what is stored in the `$_SESSION` variable, set **Validate HTTP_VIA** to “Yes.”
 - c. To verify that the forwarded-for address of a request matches what is stored in the `$_SESSION` variable, set **Validate HTTP_X_FORWARDED_FOR** to “Yes.”
 - d. To verify that the browser or device that is used to access the store during a session matches what is stored in the `$_SESSION` variable, set **Validate HTTP_USER_AGENT** to “Yes.”
 - e. If you want a user to stay logged in while switching between stores, set **Use SID on Frontend** to “Yes.”

If including SID with analytics, you must configure your analytics software to filter the SID from URLs, so the page visit counts are correct.

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

Browser Capabilities Detection

As is true of most websites and applications on the Internet, Magento requires that the visitor's browser allow both cookies and JavaScript for full operations. However, occasionally a user's browser is set to the highest privacy setting that prevents both cookies and JavaScript. Your store can be configured to test the capabilities of each visitor's browser, and to display a notice if the settings need to be changed.

- If the browser's privacy settings disallow cookies, you can configure the system to automatically redirect them to the [Enable Cookies](#) page, which explains how to make the recommended settings with most browsers.
- If the browser's privacy settings disallow JavaScript, you can configure the system to display the following message above the header of every page:

To configure browser capabilities detection:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **General**, choose **Web**.
3. Expand ☺ the **Browser Configuration Detection** section, and do the following:
 - a. To display instructions that explain how to configure the browser to allow cookies, set **Redirect to CMS-page if Cookies are Disabled** to "Yes."
 - b. To display a banner above the header when JavaScript is disabled in the user's browser, set **Show Notice if JavaScript is Disabled** to "Yes."

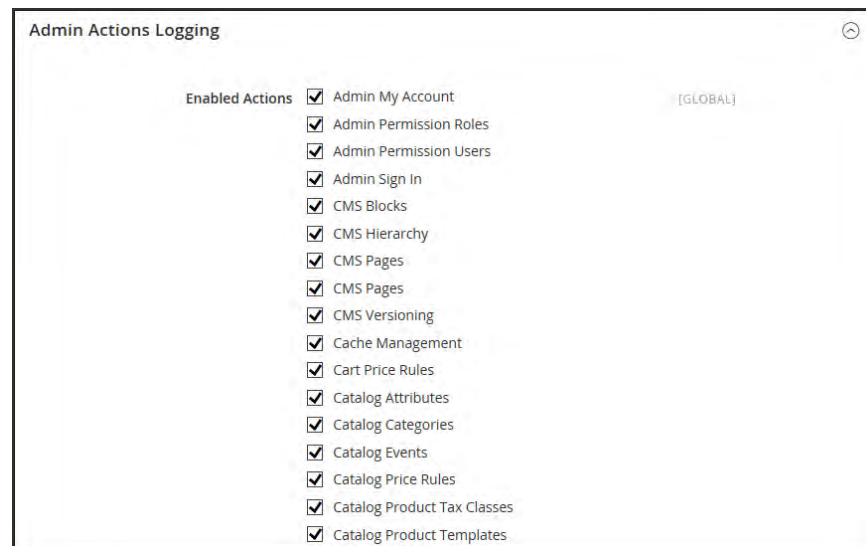
Browser Capabilities Detection		⊞
Redirect to CMS-page if Cookies are Disabled	Yes	[STORE VIEW]
Show Notice if JavaScript is Disabled	Yes	[STORE VIEW]
Show Notice if Local Storage is Disabled	No	[STORE VIEW]

Browser Capabilities Detection

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


Action Log

The Action Log tracks the activities of administrators who work in your store. For most events, the available information includes the action, the name of the user who performed it, whether it was a success or failure, and the ID of the object on which the action was performed. Additionally the IP and date are always logged.



Admin Actions Logging

To configure the Action Log:

1. On the Admin sidebar, tap **Stores**. Then under **Settings**, choose **Configuration**.
2. In the panel on the left under **Advanced**, choose **Admin**.
3. Expand  the **Admin Actions Logging** section, and do the following:
 - To enable admin logging, mark the checkbox.
 - To disable admin logging, clear the checkbox.
4. When complete, tap **Save Config**.

Appendices

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APPENDIX A:

Release Notes

Release notes provide a detailed description of each product release, with links to additional technical information, installation instructions, and support resources.

Magento 2.x has a quarterly product release cycle, which is represented by the first decimal position in the version number. In addition, there might be interim patch releases to resolve security issues, and make necessary updates to the software. Patch releases are represented by the second decimal position in the version number. This user guide reflects the most current version of the product, which appears in the upper-right corner of each page.

We sometimes refer to the current quarterly release, which at this time is 2.0, or to a specific patch release, such as 2.0.2. The designation 2.x is a general reference that includes any future or past version of the product.

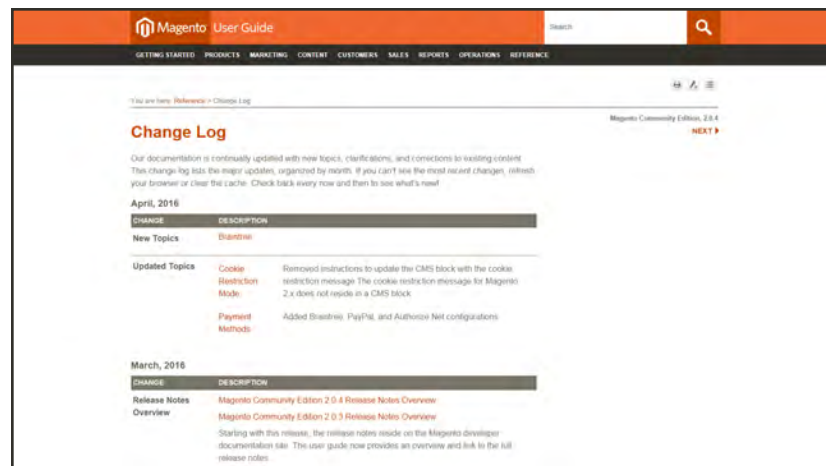
As a best practice, we recommend that you keep your Magento 2.x installation up to date, so you can benefit from the latest features and advancements in digital commerce. You can find the release notes for the current and previous versions of `[[[Undefined variable MyVariables.Product Name 2.x]]]` online.

- [Magento Enterprise Edition 2.0.4 Release Notes](#)
- [Magento Enterprise Edition 2.0.3 Release Notes](#)
- [Magento Enterprise Edition 2.0.2 Release Notes](#)
- [Magento Enterprise Edition 2.0.1 Release Notes](#)
- [Magento Enterprise Edition 2.0 Release Notes](#)

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

A percentage added to the cost of an item to determine the retail price.

media storage

A dedicated space on the content delivery network for your store's assets.

merchant account

An account with a bank or financial institution that makes it possible to accept credit card transactions.

meta tags

Information in a web page that is not displayed on the page itself, but is used by search engines to determine the page title, description, and page keywords.

My Term

My definition

N

navigation

The primary group of web page links that a customer uses to navigate around the website; the navigation links to the most important categories or pages on an online store.

O

opt-in

The process by which a user consents to receiving emails from an online store.

P

packing slip

A document that is usually included in a shipped package that describes the contents. Packing slips do not include financial or account information.

path to purchase

The path a prospect follows that leads to a sale.

payment bridge

An application that helps merchants meet PCI- DSS requirements.

payment gateway

A service that charges your customers' credit cards and sends the funds to your merchant account, for deposit into your business bank account.

Payment Gateway

A third-party service that processes transactions for external payment methods.

Payment Method

A way for the customer to pay for the merchandise in your store. Payment methods can be internal or external. The Payment Methods section of the System Configuration includes all basic payment methods and gateways.

PCI

Payment Card Industry: Refers to debit and credit cards and their associated businesses.

privacy policy

A document that explains the merchant's policies for handling customer information.

purchase order (PO)

A written sales contract between a buyer and seller that describes the merchandise or service to be purchased from a vendor.

R

redirect

A method used to alert browsers and search engines that a page has been moved. 301 Redirect: Permanent change 302 Redirect: Temporary change

relative link

A hyperlink that includes only the address of the linked page that is relative to the linking page, rather than the full URL.

return policy

A document that explains the merchant's rules regarding the return of products by customers.

robots.txt

A file placed on a website that tells search engine crawlers which pages not to index.

RSS feed

Really Simple Syndication: A technology that creates web content syndication and allows web users to subscribe to product feeds, websites, and blogs.

S

SaaS

Software as a Service: A software delivery model where the vendor provides the software and hosting environment, and customers pay for the service by subscription or per use.

Sass/Compass

A CSS pre-compiler that provides organizable, reusable CSS.

security certificate

Information that is used by the SSL protocol to establish a secure connection.

SEO

Search Engine Optimization: The process of improving a website's search engine rankings in order to increase valued visitors.

SERP

Search Engine Results Page

settlement

Settlement occurs when the acquiring bank and the issuer exchange funds and the proceeds are deposited into the merchant account.

shipping carrier

A company that transports packages. Common carriers include UPS, FedEx, DHL, and USPS.

shopping cart

A grouping of products that the customer wishes to purchase at the end of their shopping session.

sidebar

The right or left column of a two-column page layout.

sitemap

A page that provides search engines with an efficient, alternate route through your site.

SKU

Stock Keeping Unit: A number or code assigned to a product to identify the product, options, price, and manufacturer.

splash page

A promotional page with a product or advertisement; normally displayed before the home page.

SSL certificate

A validation and security mechanism that identifies the merchant and encrypts credit card and other sensitive information.

static block

A fixed content block that can be displayed on various content pages in a store.

static content

Content that does not change frequently. See also dynamic content.

T

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:

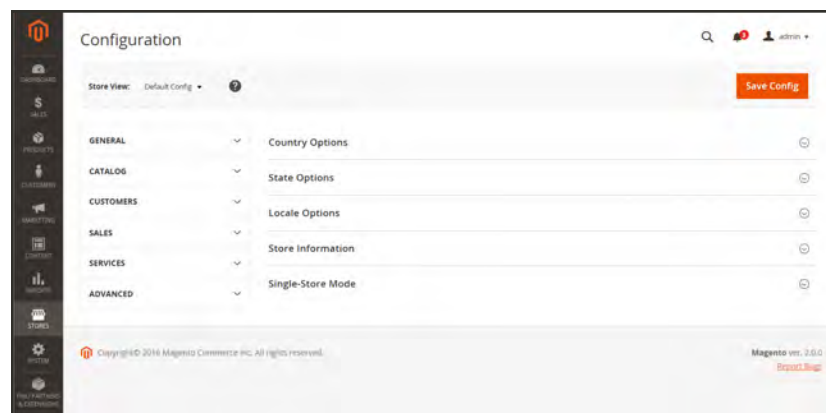
Configuration Reference

This reference has field descriptions for every configuration setting in Magento Community Edition 2.0. To learn how to apply configuration settings to specific store views, see: [Configuration 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.

Click any of the following links to go to the corresponding section in the online reference:

- [General](#)
- [Catalog](#)
- [Customers](#)
- [Sales](#)
- [Services](#)
- [Advanced](#)



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