

Magento Community Edition User Guide

Version 1.9.2



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Getting Started

In this section...

Welcome to Magento!

About This Release

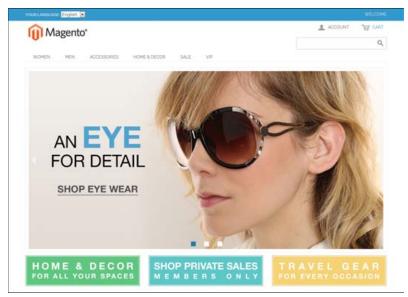
Your Magento Account

Quick Tour



CHAPTER 1: Welcome to Magento!

Magento Community Edition is a feature-rich eCommerce platform, built on opensource technology that provides online merchants with unparalleled flexibility and control over the look, content, and functionality of their eCommerce store. Magento's intuitive Admin features powerful marketing, search engine optimization, and catalog management tools to give merchants the power to create sites that are tailored to their unique business needs. Designed to be completely scalable, Magento CE offers companies a stable, secure, customizable eCommerce solution.



Magento Community Edition

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 white papers, and webinars.

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Security Center

Join Magento's Security Alert Registry to get the latest information on all potential vulnerabilities. See also: Security Best Practices.

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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!

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Webinars

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



Training & Certification

Learn 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

Need help to set up or fine-tune your store? Magento's certified developers and consultants are experts in store setup, design, integration and marketing. Find a certified expert and jumpstart your business today!



Expert Consulting Services

Magento's 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.



Facebook

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



Twitter

Follow us on Twitter!



LinkedIn

Join a Magento group on LinkedIn.



Google+

Add us to your circle on Google+.



YouTube

Learn while you watch videos on our YouTube channel!



Meetup

Find a Magento Meetup near you!



CHAPTER 2: About This Release

Magento Community Edition 1.9.2 provides merchants with many enhancements that make it easier to build and maintain a high quality and secure site, including:

- Automated Magento Test Framework
- Technology updates and quality improvements
- Security enhancements

To learn more, see the Release Notes in the Appendix of this guide.

Important! Use Magento Community 1.9.0 or later for all new installations and upgrades to ensure that you get the latest fixes, features, and security updates.

System Requirements

For a standard installation, Magento Community Edition 1.9.2 requires the following:

SYSTEM REQUIRE	MENTS
Environment	LAMP (Linux, Apache, MySQL, and PHP) or LNMP stack
Operating System	Linux x86-64
Web Server	Apache 2.x
	Nginx 1.7.x
Database	MySQL 5.6 (Oracle or Percona)
PHP	PHP 5.4
	PHP 5.5
SSL	A valid security certificate is required for HTTPS. Self-signed certificates are not supported.
Supported Technolog	gies
Redis	Redis can be used for session or cache storage.
Memcached	Memcached can be used for session or cache storage.
Apache Solr	(Magento Enterprise Edition only)
	Can be used as an alternate search engine.

Visit our website for the System Requirements of previous releases.

Compatibility Check

The magento-check script tests your server against the system requirements, and generates a report. You can download the script from our website.

To check the compatibility of your server:

- 1. Download the magento-check file to your computer.
- 2. Extract the archive anywhere on your computer. Then, upload the extracted file, **magento-check.php**, to the Magento directory on your server.
- **3.** Use your browser to navigate to the following page in your Magento directory:

magento/magento-check.php

Installing Magento

Magento Community Edition is open source software and can be downloaded for free. Developers can modify the core code and add features and functionality by installing extensions from the Magento Connect marketplace.

Because Magento does not provide technical support for this software, you can benefit from the knowledge of experts in the community for help with the installation and configuration. Answers to many technical questions can be found on our user forum.

After you verify that your hosting environment meets the system requirements, you can download Magento Community Edition free of charge from the Magento community site. Although optional, we recommend that you register on our site so you have access to the forums, wiki, groups, screencasts, and other resources the community has to offer.

Magento Community Edition is licensed under the Open Software License (OSL) v3.0, an open source certified license. To learn more, see the License / Trademark FAQ on our site.

Part I: Magento Installation

During the first part of the installation, you will download the scripts and sample data files needed to install Magento. You will also set up permissions on the server, and create a new database.



Downloader

Process Overview:

Step 1: Download the Magento CE Downloader Script

Step 2: Download the Sample Data

Step 3: Upload the Downloader Script to Your Server

Step 4: Grant File Access Permissions

Step 5: Set Up the Store Database

Step 6: Upload the Sample Data to Your Server

Step 7: Run the Magento CE Downloader

Step 1: Download the Magento CE Downloader Script

- 1. Go to the Magento Community Edition download page.
- **2.** In the Downloader section, select one of the following formats for the archived downloader. The archive file name is: magento-downloader-x.x.x.zip (or .tar.gz, or .tar.bz2). The size of the archive is approximately 46K.
 - .zip
 - .tar.gz
 - .tar.bz2
- **3.** Click the **Download** button. While the file is downloading, take a moment to look over the resources on the Magento Community page.
- **4.** Extract the archive to a directory of your choice on your local computer. The name of the extracted file is: downloader.php

Step 2: Download the Sample Data

Magento provides sample data with examples of products and basic content pages to help you get started. When you are ready to build your own catalog, you can reinstall Magento without the sample data. This step is recommended, but is not required.

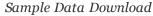
- 1. In the Sample Data section, **Select your format** for the archived sample data.
- 2. Click the **Download** button, and **Save** the file anywhere on your local computer. The file name is: magento-sample-data-x.x.zip (or .tar.gz, or .tar.bz2). The size of the archive is approximately 10MB.

Magento provides sample data with examples of products and basic content pages to help you get started. When you are ready to build your own catalog, you can reinstall Magento without the sample data. This step is recommended, but is not required.

3. In the Sample Data section, **Select your format** for the archived sample data.

4. Click the **Download** button, and **Save** the file anywhere on your local computer. The file name is: magento-sample-data-x.x.zip (or .tar.gz, or .tar.bz2). The size of the archive is approximately 10MB.

o the basic Magento	Installation. Learn More »		
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Step 3: Upload the Downloader Script to Your Server

Use an FTP or SFTP tool to copy the extracted downloader script to the root www directory of the server. (The root www directory is usually named public_html.) As an alternative, you can copy the file to another subdirectory, such as /store.

Step 4: Grant File Access Permissions

For the Magento Installer to work correctly, the top-level Magento directory on the server, and all directories beneath it must have correct permissions. To learn more, see the Knowledge Base article: Recommended File System Ownership and Privileges.

Step 5: Set Up the Store Database

- 1. Create a new, empty database using one of the following methods:
 - Use phpMyAdmin or a similar tool provided by your hosting company. For instructions, see the documentation for the specific tool.
 - MySQL command line
- **2.** Create a new user with full permissions to the database. Then, write down the following information:

dbname	The database name.
dbuser	The name of the database user.
dbpassword	The password for the database user.

Step 6: Upload the Sample Data to Your Server

If you want to use the sample data, it must be installed now. If you are ready to add your own products, skip this step. You can use either of the following methods to install the sample data:

Method 1: FTP or SFTP

1. Extract the sample data archive that you downloaded in Step 2, to a directory of your choice on your local computer. The file name is similar to: magento_sample_data_ for_x.x.sql.

The archive contains an SQL script with a dump of the sample data, and a media/catalog folder with category and product images.



Sample Data Archive

2. Use an FTP or SFTP tool to copy the media folder and its subdirectories from your local computer to the magento installation directory on the server. Depending on your server, the path will look something like this:

```
/var/www.magento/media
/var/www/html/magento/media
```

3. Use an FTP or SFTP tool to copy the magento sample data script to the server. A good place to put it is in the media/catalog folder.

```
/var/www/magento/media/catalog
/var/www/html/magento/media/catalog
```

- **4.** Do one of the following:
 - Use phpMyAdmin, or a similar tool to run the sample data script and import the data into the new database.
 - On the command line, enter the following:

```
mysql -u <root user> -p <magento-db-name> < <path-and-filename of db-
script>
```

Method 2: Command Line

If you prefer to install the sample data from the command line, see this Knowledge Base article, under the heading: Installing Optional Sample Data.

You're ready to install Magento!

Step 7: Run the Magento CE Downloader

1. From your browser, navigate to the location of the Magento downloader on your server. The Magento Downloader welcome page appears.

Installation	Welcome to Magento Downloader!
Welcome Validation Magents-Connect Manager Deployment Download License Agreement Localization Configuration Configuration Configuration Create Admin Account You're All Sett taving trouble installing Magento?	This wicard will install Magento to your server. Please visit Magento community site <u>intro //www.magentocommerce.com/</u> before you start to install.

Welcome

2. To validate your server environment, click the Continue button. If error warnings appear, correct the errors and click the Check Again button.

PHP version is right. Your version is 5.3.5.
PHP Extension curl is loaded
PHP Extension dom is loaded
PHP Extension gd is loaded
PHP Extension hash is loaded
PHP Extension iconv is loaded
PHP Extension mcrypt is loaded
PHP Extension pcre is loaded
PHP Extension pdo is loaded
PHP Extension pdo_mysql is loaded
PHP Extension simplexml is loaded

Validation

- **3.** When you pass the validation test, do the following:
 - **a.** Enter the following **Database Connection** information:
 - Host
 - User Name
 - User Password

MySQL	•	•
Host*	Database Name *	Database Name *
localhost	magento	magento
If you are not using default UNIX socket, you ca it here instead of host, ex.: /var/run/mysqld/mys	ld.sock	can specify /sqld.sock
If you are not using default UNIX socket, you ca it here instead of host, ex.: /var/run/mysqld/mys		can specify /sqld.sock
You can specify server port, ex.: localhost.330 If you are not using default UNIX socket, you ca it here instead of host, ex.: /var/run/mysqld/mys User Name * magento	ld.sock	an specify /sqld.sock User Password
If you are not using default UNIX socket, you ca it here instead of host, ex.: /var/run/mysqld/mys User Name *	ld.sock User Password	an specify /sqld.sock User Password

Database Connection

- **b.** Click the **Check InnoDB** button to confirm the connection.
- **c.** When you receive confirmation that the credentials are valid, click the **Continue** button.
- 4. On the Magento Connect Manager Deployment page, do the following:

gento Connect Manager Deployn	ient	
Loader Protocol		
HTTP		
Stability		
stable		
Deployment Type		
ACCOUNT OF THE OWNER		
a Local Elessatem		
	Loader Protocol Magento Connect Channel Protocol HTTP Stability Magento Connect Manager Version Stability stable Opployment Type e Local Filesystem	Loader Protocol Magento Connect Channel Protocol HTTP Stability Magento Connect Manager Version Stability stable

Magento Connect Manager Deployment

- **a.** In the Loader Protocol section, set **Magento Connect Channel Protocol** to one of the following:
 - HTTP (Recommended) HTTP is faster than FTP.
 - FTP Choose FTP if outgoing connections are not allowed in your hosting environment.

Loader Protocol	
Magento Connect Char	inel Protocol
HTTP	
	Loader Protocol

b. In the Stability section, set Magento Connect Manager Version Stability to "Stable."

Stability Magento Connect Manage	r Version Stability	
stable		
	Stability	

c. In the Deployment Type section, select one of the following:

Deployment Type ○ Local Filesystem ④ FTP Connection		
	Deployment Type	
FTP Connection	server without changing permissions. After choosi	ows you to upload files to the read/write/execute ang FTP connection, complete nation provided by your FTP
	Host Name	Enter the host name of the FTP server.
	Credentials	Enter the FTP credentials provided by your FTP server administrator
	Installation Path	Enter the path where Magento CE will be installed. The installation path points to the same directory that contains the downloader.php file.
Local Filesystem		•

If the web server user can't write to the magento directory, do not proceed. It's most likely an ownership issue, rather than a permissions issue.

- **d.** To verify the connection, click the **Check FTP** button. You will not be able to continue if any of the deployment parameters are invalid. After the FTP connection is verified, click the **Continue** button.
- 5. When the Magento Installation Wizard appears, do the following:

Installation	Welcome to Magento's I	nstallation Wizard!		
Welcome Validation Magento Connect Manager	You are now ready to continue the insta Magento Connect Channel Protocol	flation process by downloading th	e most up-to-date copy of the Magento	software.
Deployment Download License Agreement Localization Configuration Create Admin Account You're All Sett	Use Custom Permissions: Deployment Type: Start the download process	No Local Filesystem		

Magento Installation Wizard

- **a.** Set **Magento Connect Channel Protocol** to the same protocol you selected in the previous step. (Options include: HTTP/FTP)
- **b.** Custom permissions determine how read, write, and execute permissions are applied to the downloaded folders and files. Set **Use Custom Permissions** to one of the following:
 - Yes The Magento CE administrator can execute, write, and read files in the downloaded folders. In the Folders and Files fields that appear, specify values in the octal number system to denote the permissions that the Magento administrator has for folders and files on the server.
 - No Custom permissions are not specified for downloaded folders and files. In this case the system default values are used:
 - o777 Folder permissions to read, write, and execute.
 - o666 File permissions to read and write.
- **c.** Set **Deployment Type** to the type specified in the previous step. (Options include: Local Filesystem/FTP)

d. When you are ready to start the download, click the **Start the Download Process** button to begin.

Installation	Welcome to Magento's	Installation Wizard!	
Welcome Validation	You are now ready to continue the insta	Italion process by downloading If	he most up-to-date copy of the Magento software.
Magento Coonect Manager Deployment Download License Agreement Localization Create Admin Account You've All Self laving trouble installing Magento? heck out our installation Guide	Magento Connect Channel Protocol: Use Custom Permissions: Deployment Type: Start the download process (2) Auto-scroll console contents Checking dependencies of "packa Checking dependencies of "packa Checking dependencies of "packa Instanting package community/b Package download struct factor	Latest-1.5.1.0.tpr hpp_All_Latest 1.5.1.0 test 1.5.1.0 installed succ	

Starting to Download

e. When the "Download completed" message appears, click the **Continue to Magento Installation** button.

If you were unable to complete the download process due to a connection error, try to upload the Full Magento Package from the Community download page.

6. Complete Part II of the installation.

Part II: Magento Installation

During the second part of the Magento installation, you will complete the initial configuration, and create an admin account.

Process Overview: Step 1: Run Setup Step 2: License Agreement Step 3: Localization Step 4: Configuration Step 5: Create an Admin Account

Step 1: Run Setup

From your browser, enter the path to your Magento installation. Depending on the installation location, it is similar to one of the following:

```
http://[your_domain]/magento
http://www.[your_domain]/magento
http://www.[your_domain]/[directory]/magento
```

Step 2: License Agreement

Read the terms of the Magento Community Edition End User License Agreement. If you agree to the terms, click the **Continue** button.



License

Step 3: Localization

Select the default localization settings for your Magento CE installation. The values can be changed later for specific stores, store views, and websites.

- Locale
- Time Zone
- Default Currency

Locale settings	
Locale *	
English (United States) / English (United S	
Time Zone *	Default Currency *
Central Standard Time (America/Chicago) 💌	US Dollar 🔹

Locale Settings

Step 4: Configuration

- **1.** In the Database Connection section, do the following:
 - a. Set Database Type to "MySQL."
 - **b.** In the **Host** field, enter the server's fully qualified host name or IP address. If your database server is on the same host as your web server, enter "localhost."
 - **c.** Refer to the database credentials from Part 1: Step 5, and enter the following:
 - Database Name
 - User Name
 - User Password
 - **d**. (Optional) The Table prefix is used when there are multiple instances of Magneto that share a single database. To learn more, see the Knowledge Base article: Installing and Verifying Magento Community Edition.

MySQL		
Host*	Database Name *	
localhost	magento	
User Name *	User Password	
magento	•••••	
Tables Prefix		

Database Connection

- 2. In the Web Access Options section, do the following:
 - a. Enter the Base URL for the Magento store.
 - **b.** In the **Admin Path** filed, enter the base URL for the store's Admin Panel. (The default value is "admin.")
 - c. To display charts in the Dashboard, select the **Enable Charts** checkbox.

- **d.** If you are installing Magento to a development or test environment, and the Web server is not verifiable, select the **Skip Base URL Validation Before the Next Step** checkbox. Otherwise, leave the checkbox unselected.
- e. (Recommended) To enable the Apache mod_rewrite module, select the Use Web
 Server (Apache) Rewrites checkbox. To learn more, see the Knowledge Base article: Installing and Configuring Required Prerequisite Software.
- f. (Recommended) If your server has a valid security certificate, select the **Use Secure URLs (SSL)** checkbox. Then, complete the following:

Secure Base URL Enter the complete base URL for the SSL connection.

Run the Admin InterfaceSelect the checkbox to run the store admin on the securewith SSLchannel.

These initial SSL settings can be modified later.

E	ase URL *
	http://10.249.149.45/magento/
A	dmin Path *
	admin
Α	dditional path added after Base URL to access your Administrative Panel (e.g. admin, backend, control etc.).
1	Enable Charts
E	nable this option if you want the charts to be displayed on Dashboard.
[Skip Base URL Validation Before the Next Step
C	heck this box only if it is not possible to automatically validate the Base URL.
1	Use Web Server (Apache) Rewrites
γ	ou could enable this option to use web server rewrites functionality for improved search engines optimization.
P	lease make sure that mod_rewrite is enabled in Apache configuration.
[Use Secure URLs (SSL)
F	nable this option only if you have SSL available.

Web Access Options

3. In the Session Storage Options section, set **Save Session Data In** to one of the following:

Session Storage Options	
· · · · · · · · · · · · · · · · · · ·	
Save Session Data In	
Save Session Data In File System	

Session Storage Options

File System	Stores user session data on the file system in the magento- install-dir/var/session directory. File-based session storage is the most common configuration.
Database	Stores user session data in the database. Choose database storage for a clustered database, or if system access is slow.

4. When the Configuration settings are complete, click the **Continue** button.

Step 5: Create an Admin Account

- **1.** In the Personal Information section, enter the following:
 - First Name
 - Last Name
 - Email

First Name *	Last Name *	
Magento	User	
Email *		
magentouser@example.com		

Personal Information

- 2. In the Login Information section, do the following:
 - a. Enter the Username you of the owner of the Magento store.
 - **b.** Enter the **Password** that is associated with your Admin account. To confirm, enter it again in the **Confirm Password** field.

Login Information			
Username *			
admin			
Password *	Confi	rm Password *	
•••••	••••	•••	

Login Information

3. (Optional) If you already have one, enter the **Encryption Key**. Otherwise, Magento will generate one for you.

The encryption key protects sensitive data such as passwords and personally identifiable customer information. The encryption key is stored on the server at: /app/etc/local.xml

Important! When Magento generates your encryption key, write it down and keep it in a safe place. If you ever move your data to another Magento CE site, you will need the encryption key to recover the data.

Encryption Key	
Magento uses this key	to encrypt passwords, credit cards and more. If this field is left empty the system will create an encryption key
for you and will displa	
	Encryption Key

- 4. Click the **Continue** button, and you're all set!
 - To explore your new store, click the **Go to Frontend** button.
 - To explore your store's admin, click the **Go to Backend** button.

Reinstalling Magento

If you want to repeat the installation of Magento Community Edition on the same server, it is not necessary to download the files again.

To reinstall Magento:

- 1. On the server, delete the file: app/etc/local.xml
- 2. Delete any files and directories found in: var/
- 3. With your browser, navigate to your Magento directory. For example:

http://www.yourDomain.com/magento-directory

The Magento Installation Wizard launches automatically.

Using a Staging Environment

If you plan to develop your store over a period of time, we recommend that you set up a staging environment where you can test changes before applying them to the live store.

A staging environment is just like any other Magento installation, but is not accessible to the public. You can use a version control tool to keep files synchronized between the staging environment and the live store. We highly recommend that you use a staging environment to test extensions and before updating your live store to a new version of Magento Community Edition.

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

1

Unsecure URL

Verify that the Base URL for the storefront is correct for the live environment.

Secure URL

Before launching your store, install a 100% Signed and Trusted Security Certificate for the server that is using a Secure Base URL.



 \sim

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.

Sales Settings



Sales Document Setup

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

_			
		Γ.	
	,	1	

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.

Google API

Magento is integrated with Google API to allow your business to use Google Merchant Center, Google Analytics, Google Sitemap, and Google Shopping. Make sure to set up a Google Merchant Account, and then verify and claim your website URL.

M PayPal

 \mathbf{M}

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

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



Log Cleaning

Log cleaning must be enabled to make sure that the database log tables are periodically cleaned. If you do not set this to clear your database log_tables, your database can grow very large when the store has a full traffic load. Set the number of days the log is saved according to your needs and server capacity.



Transactional Emails

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



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. In 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

To create a Magento account:

- 1. Visit the Magento site: http://www.magento.com
- 2. In the upper-right corner, click My Account.
- 3. Under New Customers, click **Resister**. Then, do the following:

Mager	to an ebeying company					
PRODUCTS C	USTOMERS PARTNERS TRAINING	RESOURCES HELP COM	PANY			
Login or	Create an Account					
Registere	d Customers	14	re Customers			
Epol Nove a	n account with us, top in whith your entail addres		creating an account with our store, you with sugh the checknest process faster, store m			
* Email	Username		decase, view and back your orders in you			
	Password				-	
	Forget Your Password?	Logar				
	- 6arc	anna Farth				
OUR SITES MARENTO Mageners Corporate	ine for the second s	Magento andayre company	eCommerce platform, se to help grow your busine		nd services	
					nd services	
MARENTO Magener's Corporate ENCLEMPTICS & EOF Enterprise Carls Part MARENTO GO	rion ben				nd services	
MARENTO Magento's Corporat EXTERPERTS EDT Transpose Caus Par MARENTO GO Small Research Store	rion ben	an abay in: company	to help grow your busine GET IN TOUCH We'd like to hear from you!		nd services	
MARENTO Magentis Corporate ENTERPRISE COR Enterprise Carls Part MARENTO GO	NON tem host LEARN COMP cs CAREE	an doay to company I MORE ANY 183	to help grow your busine 621 IN TOUCH We'd like to hear from you? seed us at email or talk to 1		nd services	
MARENTO Magento's Corporate Entransmission Experime Interprete Case The MARENTO GO Small Reserves Store CONNECT	NON hom LEAAN coup cn CARE STE M	an diay TC company I MORE ANY RS ROOM	to help grow your busine GET IN TOUCH We'd like to hear from you!		nd services	
MARINTO Magenery Corporat Uniferential Distribution Class Ref Charle Bacterial Star Connect Connect Connect Connect Connect Connect Benerics for Device Partners	IDON born LLAAN do COMP da CARE PRES proc STITE M CONN	an disaying company I MORE ANY ISS ROOM LAP	to help grow your busine 621 IN TOUCH We'd like to hear from you? seed us at email or talk to 1		nd services	
MARINTO Magemen's Corporat Destroyed and the Send Recent Case Net Constitution of Con- Send Recent Case Constitution Const	non LLARN http: LLARN ce CARR pris SITE U cyms CONN	an disaying company I MORE ANY ISS ROOM LAP	to help grow your busine etrin Touch Wrid like to hear from your send on an email or talk to t contact us etr the LATEST NEWS See Magento in the news, fi	ss. Call us, ales		
MARINTO Magenery Corporat United States Class Ref Connect Class Ref Connect Connect Connect Manage Division for Deep Protocores for Deep PARTNERS	non hot COMP ca CANN pers Sitt M n CONN c	en dooyYC conceny I MORI ROS ROSM LAP LCT	to help grow your busine SET IN TOUCH We'd like to hear from your seed in an ensaid or talk to t CONTACT US GET THE LATEST NEWS	ss. Call us, ales		

Log In to Your Account

- 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.
- c. Enter a Screen Name to identify you in the Magento forums.

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

d. 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.

e. When complete, click Submit. Your account dashboard appears.

To log in to your Magento account:

- 1. Navigate 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, click the **Login** button.

To receive a new password:

- **1.** If you forget your password, click **Forgot Your Password?** Then, enter the **Email Address** that is associated with your account.
- 2. Click the **Submit** button.

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, select Account Settings. Then, click 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.

Magento					
PRODUCTS CUSTOMERS PA	ARTNERS TRAINING RESOURCES	HELP COMPANY	BLOG		Ä
My Account ID: MAG00000001 Log Out	Change Password	_	Switch Accounts: (49 A	ourt • O	
My Products and Services	* A3 inducted fields are repared				
Account Settings Consist Information Change Proceed Avatar Developer Prote Enting and Payments Actuale Magents Connect	New Password*	co	nfirm New Plassword *		
§ Billing History					
G Support					
- Downloads					
Developers Developers					
Ø₂ tAssages					
(III) Shared Access					

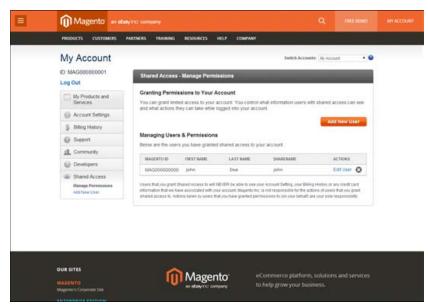
Change Password

5. When complete, click the **Submit** button.

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 My Account panel on the left, under Shared Access, click Add New User.
- 4. In the New User Information section, 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.
- **5.** 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, select the checkbox of each item that you want to make available to the other person:
 - Your Email
 - Your Phone
- **6.** In the Grant Account Permissions section, select the checkbox of each item that you want to share.
- 7. When complete, click the **Create Shared Access** button.

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.

My Account Switch Accounts IN Account					
ID: MAG00000001 Log Out	Shared Access - Add a New User				
My Products and Services	New User Information	Shared Information			
Account Settings	Acct ID: Here User's Act 10	Sharename: Chases a come for share			
5 Billing History	Email: Email Investig New Clear's And Ed.	Share Your Contact Inh? Share			
Support	The new user's email must match the email we have on file for their Magento Acci ID	Your Email			
if Community		Your Phone:			
Developers	Grant Account Permissions to the New User				
all Shared Access	Grant Account Permissions to the New User	r			
Managa Permostane Add New User	Products & Services	Support			
	After this user account is verified have the specific permissions yo				
	information that we have apposized with your account. Wage	i see your Account Gelling, your Billing Harboy or any credit card into inc. In not respond the fair the actions of users that you grant ad germanisms to (an your behald) are your sole respondibility			

Add a New User

To access a shared account:

1. When you receive the invitation to a shared account, the first thing you must do is to 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.

Magento 🖛 📾	N/YC company			
PRODUCTS CUSTOMERS	PARTNERS TRAINING RESOURCES HELP COMPANY			
Jane	-	Switch Accounts jurie	• 0	
Log Out	Shared Account Information	Switch	1	
My Products and Services	Welcome jame You are logged in with Shared Access to the account owned by Mag	Accounts		
Support	Email Contact: john.doeBexample.com Phone Number: 9999999999		_	

Switch Accounts

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

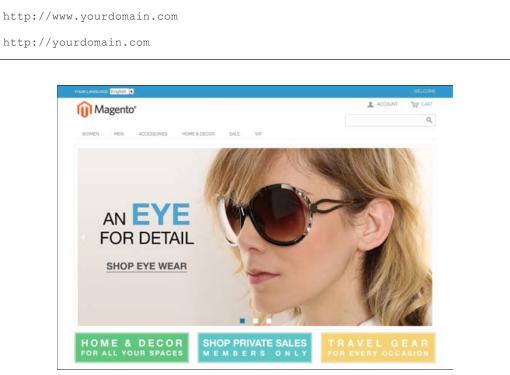


CHAPTER 4: Quick Tour

This quick tour follows the customer-decision journey that leads to a purchase on an eCommerce site powered by Magento Community Edition. Each item is linked to a topic in this guide, where you can learn more about the subject. You can also follow along on your computer with the sample data. The journey begins with your storefront.

To access your storefront:

Use your browser to navigate to your store. Your URL might look like one of the following:



Home Page

Customer Journey



Attract New Customers

Magento Community Edition 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 pre-designed 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 wishlists, 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 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 searchfriendly 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. You can also easily integrate your store with Google Sitemap.

Analytics

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

Engage Your Customers

Magento Community Edition 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.



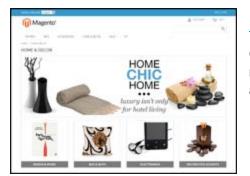
Content Management System

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



Design & Theme

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



Multiple Stores, Sites & Views

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



Multiple Devices

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



Shopping Tools

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

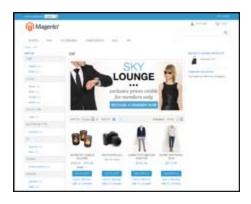
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Sophisticated Search

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

Increase Average Order Value (AOV)

Magento Community Edition 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

Magento's catalog and shopping cart price rules let you 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 readonly or and editing privileges. Track and review all activity at a granular level to specific stores and websites.

Moment of Purchase

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

Order Processing

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

Shipping Labels

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

Multiple Shipping Options

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

Multiple Payment Options

Magento Community Edition 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.

Assisted Shopping

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

Security

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

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



Newsletters

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

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

Advocacy Tools

Customers who share 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 design your own home page or work with an experienced Magento designer or Solutions Partner to customize your site.



Product Catalog

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



Payment Methods

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

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Shipping Methods

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

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Taxes

Manage your taxes with our native tools, or add thirdparty extensions from Magento Connect.

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Thanks for your order!

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



Basic Configuration

In this section...

Store Admin

Store Details

Websites, Stores & Views

Industry Compliance



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. This chapter provides a high-level overview of the management tasks that you can perform while running your store on a day-to-day basis.

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Store Admin

Admin Login

All of the basic configuration tasks are performed from the Magento Admin Panel, which is referred to in this guide as your store Admin. The initial Admin login credentials were set up during the Magento installation. For additional security, the Admin login can also be configured to require a CAPTCHA.

If you forget your user name or password, a temporary password can be sent to the email address that is associated with the account.

Magento	Log in to Admin Panel		
ē	User Name:	Password:	
	Forgot your password?	Login	
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Admin Login

To log in to the Admin:

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

http://www.mystore.com/admin

You can bookmark the Admin Login page for easy access.

- 2. Enter the User Name and Password for the Admin account.
- **3.** Click the **Login** button.

To receive new login credentials:

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

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Forgot user name or password?

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

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

My Account

Your account information contains your login credentials and personal information that was initially entered during the Magento Setup. You can edit the account information, and also create additional Admin user accounts with various permission levels.

As a best practice, it's good to have more than one Admin account with full permissions, so if you ever forget your password, you won't be locked out of the Admin.

To edit your account information:

- 1. On the Admin menu, select **System > My Account**.
- **2.** Make any changes necessary to the following:
 - User Name
 - First Name
 - Last Name
 - Email
- **3.** To change your Admin password, do the following:
 - a. Enter your Current Admin Password.
 - **b.** Enter your **New Password**. To confirm, enter it again in the **Password Confirmation** field.
- 4. When complete, click the **Save Account** button.
- **5.** Make sure to update your records so you don't forget the new password. You will need it the next time you log in to the Admin.

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LastName*	Doe			
Email*	johndoe@example.com			
Current Admin Paseword *				
New Password				
Password Confirmation				

My Account

FIELD	DESCRIPTION
User Name	The user name that is entered to log in to the Admin.
First Name	The first name of the Admin user.
Last Name	The last name of the Admin user.
Email	The email address that is associated with the Admin user account. Each Admin account must have a different email address.
Current Admin Password	Your current Admin password.
New Password	Your new Admin password.
Password Confirmation	Your new Admin password for confirmation.

Field Descriptions

Message InBox

Your store has an inbox for the messages received from Magento. The messages are rated by importance, and might refer to 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 your message inbox much as you would manage your email. Check it often to stay up-to-date on the latest information from Magento!

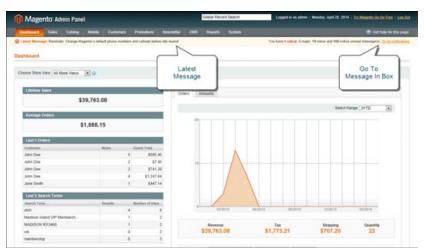
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Incoming Message

To manage incoming messages:

- **1.** When the Incoming Messages box appears, do one of the following:
 - Click the **Read Details** link for more information.
 - Click 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 click the **Read Details** link for more information.

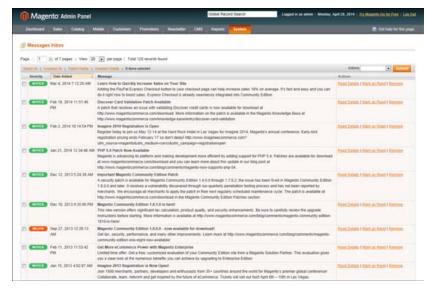


Message Notification Below Header

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

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

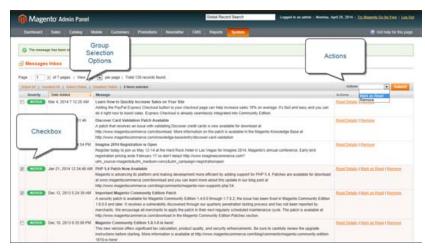
- **3.** After reading a message, you can apply any of the following actions to the message:
 - For more information, click the **Read Details** link.
 - To keep the message, click the Mark As Read link.
 - To delete the message from your inbox, click the **Remove** link.



Messages Inbox

To apply an action to multiple messages:

- 1. On the Admin menu, select **System > Notifications**.
- 2. In your message inbox, do one of the following:
 - Select the checkbox at the beginning of each message you want to manage.
 - Click 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. Click the **Submit** button to complete the process.



Apply Action

Message Importance

SEVERITY	COLOR	DESCRIPTION
Critical	Red	Indicates an important, time-sensitive message.
Major	Orange	The default message severity level.
Notice	Green	Indicates that a routine operation has taken place.

Notification Setup

You can specify how often your Message Inbox is updated, from one to twenty-four hours. If your store Admin has a secure URL, you must set the notifications to be delivered over HTTPS.

To configure Admin notifications:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select **System**.
- 3. Click to expand the **Notifications** section, and do the following:
 - **a.** If your store Admin is running over a secure URL, set **Use HTTPS to Get Feed** to "Yes."
 - b. Set Update Frequency to one of the following:
 - 1 Hour
 - 2 Hours
 - 6 Hours
 - 12 Hours
 - 24 Hours

Notifications				۵
Use HTTPS to Get Feed	No	•	[GLOBAL]	
Update Frequency	1 Hour	•	[GLOBAL]	
Last Update	Apr 12, 2015 11:49:15 AM		[GLOBAL]	

Notifications

4. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Use HTTPS to Get Feed	Global	Determines if Admin notifications are delivered over a secure channel. If your store Admin has a secure URL, select "Yes." Options include: Yes / No
Update Frequency	Global	Determines the frequency of Admin message updates. Options include:
		1 Hour
		2 Hours
		6 Hours
		12 Hours
		24 Hours
Last Update	Store View	Indicates the date and time of the last message update.

Field Descriptions

Admin Menu

All of the tools you need to manage the operation and maintenance of your store are available in the Admin menu.

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Dashboard

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

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Sales

The Sales menu is where you can find everything related to processing an order, including current and past orders, invoices, shipments, credit memos, terms and conditions, and taxes.

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Catalog

The Catalog menu controls everything related to your product catalog, including products, categories, attributes, URL rewrites, search terms and indexing, product reviews, tags, and Google Sitemap.



Mobile

The Mobile menu is where you can configure the templates, content, and apps for various mobile devices and store views.

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Customers

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

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Promotions

The Promotions 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.

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Newsletter

The Newsletter menu contains the tools you need to publish newsletters and manage your list of subscribers.

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CMS

The CMS menu is where you create and manage content for your store. In addition to content pages, you can create static blocks, "widgets," and polls.

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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.

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System

The System menu includes tools to configure and maintain every aspect of your store. In addition, you can install extensions and manage Web Services for integration with other applications.

Admin Tools

The Admin includes many lists of data for products, orders, customers, search terms, pages, blocks, and so on. Each list has the same set of tools for finding records, pagination, sorting, filtering, selecting, and applying actions to records.

Global Search

The Global Search box can be used to find any value in the database, including product, customer, and order records.

Sorting

The header of each column can be used to sort the list in ascending or descending order.

Filters

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.

Pagination

The pagination controls are used to view the additional pages of results.

Selection

The Selection controls above the column headers have links to Select All, Unselect All, Select Visible, and Unselect Visible

Actions

The Action control applies an operation to any record with a checkmark in the first column.

Global Record Search

The global search box is located in the Admin header, and can be used to find any record in the database. The results can include customers, products, orders, or any related attribute.

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Global Record Search

To do a global search:

- 1. Type the first few letters of what you are looking for into the global search box.
- 2. In the list of closely matching items, click the one that you want to find.

List Controls

Many pages in the Admin include a list of records displayed in a grid, with controls at the top of each column. The controls can be used to sort the list in ascending, or descending order based on the values in the column. In addition, you can filter the list based on a value in each column.

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Sort Controls

To sort the list:

- 1. In the upper-left corner, set **Choose the Store View** to the define the scope of the data to be retrieved.
- **2.** Click the column name of any header. The arrow indicates the current order as either ascending or descending.
- **3.** Use the pagination controls to view additional pages in the collection.

To set the pagination controls:

- 1. Set **View** to the number of records that you want to view per page.
- 2. In the **Page** box, enter the page number you want to view, or click the arrow button to advance to the next or previous, page.

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Pagination Controls

To filter the list:

- 1. In the box below the column header, either enter or select the value you want to find.
- **2.** Click the **Search** button.

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Filter Controls

Actions Control

When working with lists of data, you can use the Actions control to apply an operation to a single record, or to multiple records. The Actions control lists the operations that can be applied to the selected records. When working with the Manage Products list, you can use the Actions control to update the attributes of the group of selected products, change their status from "Disabled" to "Enabled," or delete them 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 settings individually for each product record.

The selection of available actions varies by list, and additional options may 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.

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в	237	Plaid Cotton Strett			timple Product	Cotting		mq008		\$160.00		22	Not Victore Individually	Enabled	Main Website	Let

Applying an Action to Selected Records

Step 1: Select Records

The checkbox in the first column identifies each record that is a target for the action. The search filters can be used to narrow the list to the records you want to target for the action. Do the following:

- **1.** Select the checkbox of each record that is targeted for the action. Or, use the selection links above the list to the left, to select groups of records. Options include:
 - Select All / Unselect All
 - Select Visible / Unselect Visible
- **2.** If needed, set the search filters at the top of the columns to list the records you want to include.
- **3.** In the first column, set the checkbox state to list "Any" record, or only those that match, or do not match the filter settings.

Step 2: Apply an Action to Selected Records

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

Example: Update Attributes

- 1. In the list, select the checkbox of each record to be updated.
- 2. Set the Actions control to "Update Attributes," and click the Submit button.

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

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Update Attributes

- 3. Select the **Change** checkbox next to each attribute, and make the necessary changes.
- 4. Click the **Save** button to update the attributes for the group of selected records.
- 2. Click the **Submit** button.

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.

MENU	LIST	ACTIONS
SALES		
	Orders	Cancel
		Hold
		Unhold
		Print Invoices
		Print Packingslips
		Print Credit Memos
		Print All
		Print Shipping Labels
	Invoices	PDF Invoices
	Shipments	PDF Packing Slips
		Print Shipping Labels
	Credit Memos	PDF Credit Memos
	Search Terms	Delete
CATALOG		
	Manage Products	Delete
		Change Status
		Update Attributes
	Search Terms	Delete
	Manage Tags	Delete
		Change Status
	Reviews (All / Pending)	Delete Update Status
	Tags (All / Pending)	Delete Change Status

Actions by List

Actions by List (cont.)

MENU	LIST	ACTIONS
CUSTOMER	RS	
	Manage Customers	Delete
		Subscribe to Newsletter
		Unsubscribe from Newsletter
		Assign a Customer Group
NEWSLETT	ER	
	Newsletter Subscribers	Unsubscribe Delete

Notes	



CHAPTER 6: Store Details

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

Topics in this chapter:

- Store Information
- Locale Options
- States Options
- Countries Options
- Currency
- Basic Shipping Settings
- Store Email Addresses
- Contact Us

Store Information

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

To enter the store information:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Store Information**. Then, do the following:
 - **a.** Enter the **Store Name** as you want it to appear in all communications.
 - **b.** Enter the **Store Contact Telephone** number, formatted as you want it to appear in all communications.
 - c. Select the **Country** where your business is located.
 - **d.** If applicable, enter the **Value Added Tax** number of your store. To verify the number, click the **Validate VAT Number** button.
 - e. In the text box, enter your **Store Contact Address** as you want it to appear on sales documents.
- **3.** When complete, click the **Save Config** button.

store Information			
Store Name		[STORE VIEW]	
Store Contact Telephone		[STORE VIEW]	
Country	Please Select	[WEBSITE]	
VAT Number		[WEBSITE]	
	Validate VAT Number		
Store Contact Address		[STORE VIEW]	
		1	

Store Information

Field Descriptions

FIELD	SCOPE	DESCRIPTION		
Store Name	Store View	The name of your store.		
Store Contact Telephone	Store View	The primary telephone number of your store.		
Country	Website	The country from which your store conducts business.		
VAT Number	Website	Your Value Added Tax number, if applicable.		
		ValidateVerifies the number withVAT NumberVAT ID Validation.		
Store Contact Address	Store View	The primary mailing address of your store.		

Locale Options

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

Locale Options		۰
Timezone Locale First Day of Week	Pacific Standard Time (America/Los_Angeles) English (United States) Sunday	(WEBSITE) [STORE VIEW] [STORE VIEW]
Weekend Days	Sunday Monday Tuesday Wednesday Thursday Friday Saturday	[STORE VIEW]

Locale Options

To set the store locale:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** Click to expand the **Locale Options** section.
- **3.** Select your **Timezone** from the list. Then, do the following:
 - a. Set Locale to the store language.
 - **b.** Set **First Day of the Week** to the day that is considered to be the first day of the week in your area.
 - **c.** In the **Weekend Days** list, select the days which fall on a weekend in your area. (To select multiple options, hold down the Ctrl (PC) or Command (Mac) key.)
- 4. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Timezone	Website	Identifies the time zone of the primary market served by the store. Usually the timezone is the same as that used in the physical location of your business.
Locale	Store View	Identifies the language, currency, and system of measurement used in the market served.
First Day of Week	Store View	Identifies the day that is considered to be the first day of the week in the market served.
Weekend Days	Store View	Identifies the days that fall on the weekend in the market served.

Field Descriptions

States 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 it 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 address template that determines how the information appears on invoices, packing slips, and shipping labels.

States Options		٥
State is required for	Andorra Angola Anguila Antarctica Antigua and Barbuda Argentina Armenia Aruba Australia Australia	[GLOBAL]
Display not required State	Yes	[GLOBAL]

States Options

To set up the state options:

- 1. On the Admin menu, select **System > Configuration**.
- 2. Click to expand the **States Options** section, and do the following:
- **3.** In the **State is required for** list, select each country where you want State / Province to be a required entry.

To select multiple options, hold down the Ctrl key (PC) or Command key (Mac), and click each option.

- 4. Set **Display not required State** to one of the following:
 - Yes In countries where the state field is not required, the field is included in the form as an optional entry.
 - No In countries where the state field is not required, the field is omitted from the form.
- 5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRI	PTION
State is required for	Global	Identifies the countries where you conduct business that require a state or province to be included in a postal address.	
Display not required State	Global	For countries where it is not required, determines if the State/Province field is included in the posta address of the customer. Options include:	
		Yes Includes the State/Province field in the customer address, even if not required by the country.	
		No	Omits the State/Province field from the customer address if not required by the country.

Countries Options

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

ountries Options			
Default Country	United States		[STORE VEW]
Allow Countries	Alghanistan Alamia Algania Algania Angenia Angenia Angenia Angenia Angenia Angenia Angenia Angenia Angenia Angenia Angenia Angenia	ń	(STORE VEW)
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European Union Countries	Aghanistan Aland Islands Aland Islands Ageria American Samoa Angola Angola Angola Angola Anguita Arfauta Anfauta Anfauta Anfauta	ži,	[CLOB41]

Countries Options

To set the country options for your store:

- 1. From the Admin menu, select **System > Configuration**.
- 2. Click to expand the **Countries Options** section. Then, do the following:
 - a. Set **Default Country** to the 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 **Postal Code is Optional** 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.
- 3. When complete, click the Save Config button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Default Country	Store View	Identifies the country where your store is located.
Allow Countries	Store View	Identifies each country from which you accept orders.
Postal Code is Optional for the following countries	Global	Identifies the countries that do not require a ZIP or postal code in the shipping address.
European Union Countries	Global	Identifies the countries that are members of the European Union.

Currency

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

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Setting Up Currency Rates

The Currency Rate configuration defines the base currency of your store, and the currencies that you accept as payment.

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Currency Symbols

Currency symbols appear in product prices and sales documents such as orders and invoices.

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Updating Currency Rates

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

Basic Shipping Settings

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Shipping Settings

The Shipping Settings establish the point of origin for all shipments made from your store or warehouse, and also your preference for managing orders that are shipped to multiple addresses.

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Shipping Methods

Magento supports a wide range of built-in shipping methods, including Flat Rate, Free Shipping, Table Rates, and real-time online rates.

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Shipping Carriers

If you have a commercial account with a supported carrier, you can offer your customers the convenience of real-time shipping rates, package tracking, and labels.



Shipping Labels

You can easily create shipping labels for new and existing orders from the Admin of your store. Labels can be produced at the time a shipment is created, or at a later time. Shipping labels are stored in PDF format and are downloaded to your computer.

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.

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Store Email Addresses

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 the email address you need.

Step 2: Configure the Email Addresses for Your Store

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the Configuration panel on the left, under General, select **Store Email Addresses**. Then, do the following:
 - a. Click to expand the General Contact section.
 - **b.** If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to identify the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.

Magento Adr		Global Record Search	Lapped in as ad	neer Monday, April 28, 2014 - The Manardia Galilor From Classica
Dettinget Sales	Set the Scope	natura Newsieller CMI Reports System		🕐 Cel tells for this page
Calent Messager Hamatele		alisats tarture site journet-	Clear the	e. 19 millior and 195 rollics unread mensage(s). <u>Sin to holdication</u>
Current Configuration Scoper Franch	Store Email Addresse	•	Checkbox	O Serv Exemp
Franch (*)	General Contact			- ·
Configuration	Gender Name	Madoon Island	Clas Website 1710	e vevi
UENERAL.	Sender Ernal	[eviner@elianatel.com	IE Lise Website (1710)	EVER
Oemetal				
1740	Sales Representative			
Design	Contoner Support			•
Currency Selue	Ceston Ernel 1			0 0 0
Stire Email Addresses	Centon Enert 2			•
Contacts				
Content Management				

General Contact

- **c.** In the **Sender Name** field, type the name of the person that you to appear as the sender of all email messages that are associated with the General Contact.
- d. In the Sender Email field, type the associated email address.
- 3. Repeat this process for any other email addresses that you plan to use.
- 4. When complete, click the **Save Config** button.

Step 3: Update the Sales Email Configuration as Needed

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

- 1. In the panel on the left, under Sales, select **Sales Email**.
- **2.** Click to expand each section, and make sure that the correct store email is selected as the sender of the message.
- 3. When complete, click the **Save Config** button.

Contact Us

The Contact Us link in the footer of each page is an easy way for customers to keep in touch with you. The form is enabled by default, and can be configured to send inquiries to a specific email address and replies from a specific store identity.

Magen	ito"			ACCOUNT	W CART
•				Search entire store here.	Q,
WOMEN MEN	ACCESSORES	HOME & DECOR SALE	vp		
COMPANY	C	ONTACT US			
ABOUT US		Name *		-	Required Fields
CONTACT US CUSTOMER SERVICE					
PRIVACY POLICY		Dnal *			
		Taliphone			
		Comment *			
			SURPRISE		
CONTANY	QUICKLINKS	ACCOUNT	CONNECT WITHUS	NEWSLETTER	
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EUSTOHER SERVICE HEVACT POLICY	ADVANCED SEARCH		D POUTLINE D POUTLINE		
1.11(12) 3.22(2)			P vit		

Contact Us

To configure the Contact Us form:

- **1.** On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, click **Contacts**.
- 3. Click to expand the Contact Us section, and set Enable Contact Us to "Yes."
- 4. Click to expand the **Email Options** section. Then, do the following:

Email Options		٥
Send Emails To	hello@example.com	[STORE VIEW]
Email Sender	Custom Email 2	[STORE VIEW]
Email Template	Contact Form (Default Template from Locale)	[STORE VIEW]

Email Options

- a. In the Send Emails To field, enter the email address of the recipient.
- **b.** Set **Email Sender** to the store identity you want to use for the replies sent.
- c. Select the **Email Template** used to format the data sent from the form.
- 5. When complete, click the **Save Config** button.

Notes	



CHAPTER 7: Websites, Stores & Views

When Magento Community Edition is installed, a main website, a store, and a 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 views.

Websites

Suppose you want to sell machine shop equipment online, and your spouse wants to sell handmade baskets. It is unlikely that you would sell both of these product lines in a single store. However, in a single Magento installation, you can do both by setting up separate websites. Each website can have its own domain name. The websites can be set up to share customer data, or to have entirely separate sets of customer data.

Stores

For your handmade baskets website, you might want to set up two stores, one specializing in wicker and one for other materials. You can set up two root categories (one for wicker items and one for other items) and assign one to each store. Several stores of one website can have different independent domain names as well, but it should be configured on the store view level of each store.

Store Views

Your market research indicates that about half of your potential customer base speaks English, and the other half speaks Spanish. Within each store, you can create a separate store view for each language. Each store view shares the same catalog, but in a different language. Customers can switch from one store view to another using the "language chooser" in the header of the store.

Setting Up Store Hierarchy

Before you begin, carefully 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 navigation for each store.

Also consider the prices and product attributes that are needed for each store view. Magento allows for only one standard price with a tiered pricing structure, per SKU. If you want to use a different pricing structure for a specific customer group in a store view, you must create a unique SKU for each view.

Magento Admin	Panel	Citatal Record Search	Logard is an admin Monday, April 28, 2014 Try Maximum Gir, Smith Lon, O
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alar barren and a strategic barr	ge Magents's default phone numbers and calcuds bet	ore alle hunch	You have 1 cellical, 5 maps, 16 mass and 197 todate several message(s). So in cellication
Manage Stores			Create Website O Create Store O Create Store View
Minimite Name	Dare Name		Jimes View Name
Man Website (Code base)	Medicate Internet (Root Category: Default Category:	1649	Examine Clorie delate) Email (Code francis
			(Code german)

Manage Stores

To set up a new website:

- 1. On the Admin menu, select **System > Manage Stores**.
- 2. From Manage Stores, click the **Create Website** button. Then, do the following:

Website Information	
Name *	
Code *	
Sort Order	

Website Information

- **a.** Enter the **Name** of the website. The name is for internal reference, and can refer to the domain of the site or anything else distinguish it from other sites in the hierarchy.
- **b.** Enter a **Code** that will be used on the server to point to the domain. The code must begin with a lower-case letter, and can include any combination of letters (a-z), numbers (0-9), and the hyphen (-) character.
- **c.** (Optional) Enter a **Sort Order** number to determine the sequence in which this site is listed with other sites. Enter a zero to make this site appear at the top of the list.
- **3.** When complete, click the **Save Website** button.

To set up a new store:

- 1. Before you begin, set up the root category that will be used for this store.
- 2. On the Admin menu, select **System > Manage Stores**.

3. From Manage Stores, click the **Create Store** button. Then, do the following:

Contragence with	Magento Admin Panel									
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New Store								The Back Beaut G Sever Hore		
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New Store

- a. Set **Website** to the site that is the parent of this store.
- **b.** Enter a **Name** for the store. The name is for internal reference to distinguish it from other stores in the hierarchy. For example: Private Sales Store.
- **c.** Set **Root Category** to the root category that will be used for the main navigation of the store. The root category can be the same as used for other stores, or unique to this store. For example: Private Sales Root.
- 4. When complete, click **Save Store**.

To set up a new store view:

- 1. On the Admin menu, select System > Manage Stores.
- 2. From Manage Stores, click the **Create Store View** button. Then, do the following:

Madison Island	۲
Disabled	٠

Store View Information

- a. Set **Store** to the parent store of this view.
- **b.** Enter a **Name** for this store view. The name appears in the "language chooser" in the header of the store. For example: French.
- c. Enter a **Code** in lowercase characters to identify the view. For example: french.
- 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, click the **Save Store View** button.

Configuration Scope

If your Magento installation has multiple websites, stores, or views, you can set the scope of a configuration parameter to apply to a specific part of your installation. The Current Configuration Scope box in the upper-left corner of the Admin workspace determines the scope of the current settings. By default, the configuration scope is set to "Default Config." For Admin users with restricted access, the list includes only the areas where the user is granted permission to access.

The 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.

Magen	to Adr	min Pane	4					Global Recor	t Search	Logged in an advent Monday, Apr	a 28, 2014 - 21, Maseria, Galler, Tyre - Los, Da
Destemant	See:	Cathrong	Matthe		President	Newsletter		Paperts	Tester 1		
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· CATALOG											
Catalog											

Current Configuration Scope

If your installation includes multiple websites, stores or views, you should always set the scope to identify where you want the settings to apply. The possible settings are: [STORE], [WEBSITE], and [GLOBAL].

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 applies 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 menu, select **System > Configuration**.
- **2.** In the panel on the left, select the page with the configuration settings you want to change. If necessary, click to expand the section to be configured. Then, do the following:
 - **a.** In the upper-left corner of a configuration page, set **Current Configuration Scope** to the website, store, or view where the configuration applies.

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

- **b.** Clear the **Use Default** checkbox that is after the field that you want to edit. Then, enter the new value.
- c. Repeat this process for every field that needs to be updated on the page.
- **3.** When complete, click the **Save Config** button.

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.

Adding a Language

Most of the text that appears to be hard-coded on pages throughout your store can be instantly changed to a different language by changing the locale of the view. Changing the locale doesn't actually translate the text word-for-word, but simply references a different translation table that provides the interface text that is used throughout the store. The text that can be changed includes navigational titles, labels, buttons, and links such as "My Cart" and "My Account."

There is a wide selection of language packs available on Magento Connect. You can also use the Inline Translation tool to touch up any remaining interface text that was not translated for the locale, or to fine-tune the translated text.

After changing the language of the locale, the remaining content that you have created, including product names and descriptions, categories, CMS pages, blocks, and polls must be translated separately for each store view.

Magen	to Connect		Q Search for Liter	sions I	All Platforms - MY AC
CUSTOMER DOVER	DIGE STEMMAN	EMENT INTEGRATI	ONS MAUKETING UTILITIES	THEMES	
Refine Results		Customer Expe	rience / Internationalization /	& Localization	Al Pres Pa
Sort by Relevance Plattoms Al Plattoms			Magerno Official Spanish Translation Nagerna Official Spanish Translation	Spanish	Community Modules - Spanish (Spain) Language Pack Community Modules - Spanist (Spain) Language Pack
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Iparish	Case Al	2 1694	FREE	8 1187	FREE

Language Packs on Magento Connect

Step 1: Install a Language Pack

- 1. Log in to your Magento account.
- **2.** Go to Magento Connect, and find the language pack that you want to download. Read the terms of the license, and click the checkbox to proceed.
- **3**. Click the **Install Now** button. Then, do the following:
 - a. Click the Get the Extension Key button.
 - **b.** Click the **Select** button. Then, copy the license key.

- 4. Return to the Admin of your store. Then on the Admin menu, select **System > Magento Connect > Magento Connect Manager**.
- 5. When prompted, log in to Magento Connect Manager. Then, do the following:
 - **a.** In the **Install New Extensions** section, paste your extension key.
 - b. Click the **Install** button. The language pack you have chosen appears below.

Magento	connect manager		
Extensions Set	tings		Return to Admin Log C
Settings			
Put store on the n	naintenance mode while installing/upgra	ading/backup creation	
Create Backup	atabase	\checkmark	
Install New Extensi	ons		
1 Search for module	es via <u>Magento Connect</u> .		
2 Paste extension k	ey to install: cocommerce.com/comm	nunity/Mage_Locale_es_ES	1
Extension dependenci	es		
Channel	Package Name	Version	Status
community	Mage_Locale_es_ES	1.9.0.0 (stable)	Ready to install
		Car	ncel installation Proceed

Install Language Pack

c. When ready to begin, click the **Proceed** button.

You can follow the progress in the output frame. During the installation, the language pack is uploaded to the following folder on your server:

[magento]/app/locale

Auto-scroll console contents	
Checking dependencies of packages Starting to download Mage_Locale_es_ES-1.9.0.0.tgz done: 201,476 bytea Installing package community/Mage_Locale_es_ES 1.9.0.0 Package community/Mage_Locale_es_ES 1.9.0.0 installed successfully Package installed: community Mage_Locale_es_ES 1.9.0.0	
Cleaning cache	
Cache cleaned successfully	
Procedure completed. Please check the output frame for useful information and refresh the page to see cha	nges.

Output Frame

6. To return to your store, click the **Return to Admin** link at the top of the page.

Step 2: Create a Store View for the Language

- 1. On the Admin menu, select **System > Manage Stores**.
- 2. From Manage Stores, click the Create Store View button. Then, do the following:

👔 Magento' Admin Panel				Giobal Reco	d Search	Logged in as admin : Felday, May 15, 2015 ; Lot Od			
Dashboard	Salm	Catalog	Customers	Promotions	Newsletter	CMB	Reports	System	🚯 Get help for this page
New Stor	e View								Dack Hesset Ø Save Store View
Store View In	formation	5							
Store *			Madison Islan	đ		¥			
Name*			Spanish						
Code *			spanish						
Status *			Enabled			V			
			1						

New Store View

- **a**. Select the **Store** that is the parent of the view.
- **b.** Enter a **Name** for the store view. For example: Spanish.

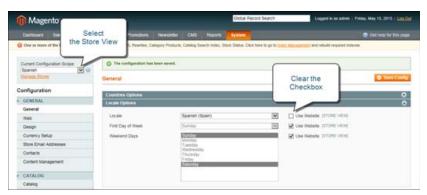
This is the name that appears in the "language chooser" in the header.

- 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, click the **Save Store View** button.

Step 3: Change the Locale of the Store View

- 1. On the Admin menu, select **System > Configuration**.
- 1. In the upper-left corner, set **Current Configuration Scope** to the store view.
- 2. Click to expand the **Locale Options** section. Then, do the following:
 - a. To the right of the Locale field, clear the **Use Website** checkbox.
 - **b**. Set **Locale** to the language that you want to assign to the view.

If there are several variations of the language available, make sure to select the one that matches the language pack that you installed. For example, the Spanish language pack downloaded in this example works only when the locale is set to "Spanish (Spain)." You will need a different language pack to support a specific regional variation. You will need a different language pack to support the regional variations of other countries.



Change the Locale

3. When complete, click the **Save Config** button.

Store URLs

The URLs that are associated with your store were configured during the initial installation of Magento. The Web access options that were entered at that time specify both unsecure and secure URLs, and whether or not a security certificate is available.

Magento uses variables to define internal links in relation to the base URL, which makes it possible to move an entire store from one URL to another without having to update the internal links.

Base URL *		
http://10.24	9.149.45/magento/	
Admin Path	*	
admin		
Additional pa	th added after Base URL to access your Administrative Panel (e.g. admin, backend, control etc.).	
V Enable (harts	
Enable this o	ption if you want the charts to be displayed on Dashboard.	
🔲 Skip Ba	e URL Validation Before the Next Step	
Check this be	x only if it is not possible to automatically validate the Base URL.	
🔽 Use We	o Server (Apache) Rewrites	
	able this option to use web server rewrites functionality for improved search engines optimization. e sure that mod_rewrite is enabled in Apache configuration.	
🔲 Use Sec	ure URLs (SSL)	
Enable this o	ation only if you have SSL available.	

Web Access Options

Secure and Unsecure Base URLs

Each website in a Magento installation has a base URL that is assigned to the storefront and to the Admin. If you have a security certificate for your domain, you can configure either, or both base URLs to operate over a securely encrypted SSL channel. Unsecure base URLs begin with "http," and secure base URLs begin with "https."

Unsecure Base URL	http://www.yourdomain.com/magento/
Secure Base URL	https://www.yourdomain.com/magento/
URL with IP address	http://10.9.220.154/magento/

If Magento was installed before you registered a domain, the base URL might include the IP address of the server. If you don't yet have security certificate, the store will not be able to switch to secure URLs (https) for transactions that normally take place over the secure socket layer (SSL). These configuration settings can be updated later to reflect the values you need before the store "goes live."

Important! Do not change the Admin URL from the default in the Base URL configuration. To change the Admin URL or path, see: Using a Custom Admin URL.

To configure the unsecure base URL:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Web**.
- 3. Click to expand the **Unsecure** section. Then, do the following:
- **4.** Enter the unsecure (http) **Base URL** for your store. Make sure to end the URL with a forward slash.

Unsecure		
Base URL	http://www.YourStore.com	EXTORE VIEWS
Base Link URL	((unsecure_base_unt))	(STORE VIEW)
Base Skin URL	((unsecure_base_unt()skin/	(STORE VIEW)
Base Media URL	@unsecure_base_urit)media/	ISTORE VIEWS
Base JavaScript URL	((Unsecure_base_urf())s/ • Warning! When using CDN, in some cases JaveScript may not run property # CDN is not in your subdomein	ISTORE VEW

Unsecure

For a typical installation, you do not need to update the paths for the skin, media, and JavaScript files. Be careful not to change the markup tags in the other fields in the section.

5. If you do not plan to use a secure base URL for the Admin, do the following:

- a. Click to expand the **Secure** section.
- **b.** Enter your unsecure (http) **Base URL**. The URL should be the same in both the Secure and Unsecure sections.
- 6. When complete, click the **Save Config** button.

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.

- 1. Click to expand the **Unsecure** section. Then, do the following:
 - **a.** To use a secure (https) for the storefront, enter the Base URL, followed by a forward slash.

Typically, you will not need to update the paths for the skin, media, and JavaScript files. Be careful not to change the markup tags in the other fields in the section.

- **b.** If you want to run the entire storefront over a secure (https) channel, set **Use Secure URLs in Frontend** to "Yes."
- **c.** If you want to run the entire Admin over a secure (https) channel, set **Use Secure URLs in Admin** to "Yes."

ocure		
Base URL	https://www.YourStore.com/	DITORE VIEWO
	 Make sure that base URL ends with 7 (slash), e.g. http://yourdomein/magenta/ 	
Base Link URL	((secure_base_unt))	(STORE VIEW)
	 Make sure that base URL ends with 7 (slash), e.g. http://yourdomain/magento/ 	
Base Skin URL	[[secure_base_url]]skin/	prove view
Base Media URL	([secure_base_urt])media/	ISTORE VIEW
Base JavaScript URL	(jsecure_base_url);s/	Intone view
	 Warming! When using CDN, in some cases JavaScript may not run property if CDN is not in your subdomain 	
Use Secure URLs in Frontend	No	Extone view
Use Secure URLs in Admin	No	(SLOBAL)
Officader header	SSL_OFFLOADED	(CLOBAL)

Secure

2. When complete, click the Save Config button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
UNSECURE		
Base URL	Store View	The full address of the Magento root folder that is not running over an encrypted (SSL) channel. The base URL must include a trailing slash.
Base Link URL	Store View	A markup tag that represents the unsecure base URL.
		{{unsecure_base_url}}
Base Skin URL	Store View	A markup tag that points to the folder where the files for the unsecure site's skin reside. By default, the folder is called "skin."
		{{unsecure_base_url}}skin/
		If your Magento installation has multiple sites that use the same folder structure, you can have a different skin folder for each site. Set the configuration scope to the correct site before entering the base skin URL.
		You can also specify a skin folder that resides outside of your Magento installation.
Base Media URL	Store View	A markup tag that points to a folder where the catalog images for this website are located. By default, the folder is called "media."
		{{unsecure_base_url}}media/
		If your Magento installation has multiple sites that use the same folder structure, you can have different media folders for each. This gives you the ability to use backup and rollback separately for each media folder.
		You can also specify a media folder that resides outside of your Magento installation.
Base JavaScript URL	Store View	A markup tag that points to the folder where the JavaScript files are located. By default, the folder is called "js."
		{{unsecure_base_url}}js/

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
		If your Magento installation has multiple sites that use the same folder structure, you can have a different JavaScript folder for each. This gives you the ability to update the scripts separately. You can also specify a JavaScript folder that resides outside of your Magento installation.
SECURE		
Base URL	Store View	The full address of the Magento root folder that is running over an encrypted (SSL) channel. The base URL must include a trailing slash.
Base Link URL	Store View	A markup tag that represents the secure base URL.
		{{secure_base_url}}
Base Skin URL	Store View	A markup tag that points to the folder where the files for the secure site's skin reside. By default, the folder is called "skin."
		{{secure_base_url}}skin/
		If your Magento installation has multiple sites that use the same folder structure, you can have a different skin folder for each. Set the configuration scope to the correct site before entering the base skin URL.
		You can also specify a skin folder that resides outside of your Magento installation.
Base Media URL	Store View	A markup tag that points to a folder where the catalog images are located. By default, the folder is called "media."
		{{secure_base_url}}media/
		If your Magento installation has multiple sites that use the same folder structure, you can have different media folders for each. This gives you the ability to use backup and rollback separately for each media folder.
		You can also specify a media folder that resides outside of your Magento installation.

FIELD	SCOPE	DESCRIF	PTION		
Base JavaScript URL	Store View	A markup tag that points to the folder where the JavaScript files are located. By default, the for is called "js." {{secure_base_url}}js/ If your Magento installation has multiple sites that use the same folder structure, you can have a different JavaScript folder for each. This give you the ability to update the scripts separately You can also specify a JavaScript folder that			
			side of your Magento installation.		
Use Secure URLs in Frontend	Store View	choose to r	ain has a security certificate, you can un the storefront, with or without SSL . Options include:		
		Yes	Store URLs begin with "https" to denote a securely encrypted channel.		
		No	Store URLs begin with "http" to denote a non-encrypted channel.		
Use Secure URLs in Admin			If your domain has a security certificate, you can choose to run the store Admin, with or without SSL encryption. Options include:		
		Yes	Admin URLs begin with "https" to denote a securely encrypted channel.		
		No	Admin URLs begin with "http" to denote a non-encrypted channel.		
Offloader header	Global	The offloader header is used with a load balance to reduce the load on your server. The process that is required to run over an encrypted SSL channel can be offloaded to a proxy server, or to multiple servers. The SSL offloader header includes a message that the channel is secure. Otherwise, the browser might display a warning that the connection is not secure. The default value is:SSL_OFFLOADED			

Field Descriptions (cont.)

Using a Custom Admin URL

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 menu, select **System > Configure**.
- 2. In the panel on the left, under Advanced, select Admin.
- 3. Click to expand the Admin Base URL section, and 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 name of the **Custom Admin Path** in the following format:

backend

Admin Base URL			٥
Use Custom Admin URL	Yes	[GLOBAL]	
Custom Admin URL	▲ Make sure that base URL ends with '/ (slash), e.g. http://yourdomain/magento/	[GLOBAL]	
Use Custom Admin Path	Yes	[GLOBAL]	
Custom Admin Path	▲ You will have to log in after you save your custom admin path.	[GLOBAL]	

Admin Base URL

4. When complete, click the Save Config button.

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/local.xml 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/local.xml 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. Do one of the following methods to clear the Magento cache:
 - On the Admin menu, select System > Cache Management. Then, click the Flush Magento Cache button.
 - On the server, navigate to the var/cache folder, and delete the contents of the cache folder.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Use Custom Admin URL	Global	Determines if a custom URL is used to access the Magento Admin. Options include: Yes / No
Custom Admin URL	Global	Specifies a custom URL to access the Magento Admin. By default, the Admin URL is the same as the base URL.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
		Important! The Admin URL must be in the same Magento installation, and have the same document root as the storefront.
Use Custom Admin Path	Global	Determines if a custom path is used to access the Magento Admin. The default path is "admin." Options include: Yes / No
Custom Admin Path	Global	Changes the name of the default Admin path. Enter the custom path name in lowercase characters. For example: backend

Notes	



CHAPTER 8: Industry Compliance

Magento Community Edition 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.

Topics in this chapter:

- PCI Compliance
- Privacy Policy
- Cookie Law

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

$\mathbf{\nabla}$	Install and maintain a firewall configuration to protect cardholder data.
V	Do not use vendor-supplied defaults for system passwords and other security parameters.
$\mathbf{\nabla}$	Protect stored cardholder data.
$\mathbf{\nabla}$	Encrypt transmission of cardholder data across open, public networks.
S	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.
$\mathbf{\nabla}$	Track and monitor all access to network resources and cardholder data.
$\mathbf{\nabla}$	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. For a complete list of the cookies used by Magento, see Cookie Restriction Mode.

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.

Maganta'		ACCOUNT THE CAR
[]] Magento		Q
WOMEN MEN ACC	ESSORIES HOME & DECOR SALE VP	
GHE / HINNEY HOUEY		
BOUT US	PRIVACY POLICY	
CONTACT US SUSTOMER SERVICE RIVACY POLICY	This website ('website') is aperated by Madison Island bre, which includes M privacy policy only encores information collected at this website, and does not Madison Island solvhites are currently sourced by this privacy policy.	
	SECURITY	
	opminited to handling your personal information with high standards of info and administrative rates to maistain the senerity and accuracy of personally number of people with has people in the new physical accurs to accuracy protections that purel against nanathenised access. Our solution uses energy personal laformatio during data transport. SRL energy to ordering laformat Constance Care coster and abase also agents accuracy aprivate, neuron schwork, he a sensor means of transmitting credit acrd information.	identifiable information use collect, including limiting the as employing electronic security systems and password tion technology, like Secure Sockets Layer (SSL), to protect ye ion such as your name, address, and credit card number. Ou
	PRIVACY POLICY	
	To help us achieve our good of providing the highest quality products and serv- ether nutroners, at oull as from other parties. Because we respect your priva personal hybrination is in handhed in a single-searce, and responsible ensures. We have good risk privacy goods, in index to a cylicito sur information odlect information is collected and used.	scy, we have implemented procedures to ensure that your
	As we continue to develop our website and take advantage of advances in tech likely will change. We therefore ensurage you to refer to this policy on an on	
	THE INFORMATION WE COLLECT	
	Generally, you may browne the website without previding any personally ide personally identifiable information at various times and places on this website requested information, you may not be able to anyon all perto of this website.	te. In some cases, if you choose not to provide us with the

Privacy Policy

To edit your privacy policy:

- 1. On the Admin menu, select CMS > Pages > Manage Content.
- 2. Find the privacy policy in the list, and click to open the page.
- 3. In the panel on the left, click **Content**.
- **4.** To work in WYSIWYG mode, click the **Show/Hide Editor** button.
- 5. Make the necessary changes to the content.
- 6. When complete, click the **Save Page** button.

Cookie Law Compliance

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

Implied Consent

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

Expressed Consent

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

Cookie Restriction Mode

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

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. See the end of this topic for a complete list of the cookies used. See the end of this topic for a complete list of the cookies used.

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."

COMPANY	GUICK LINKS	ACCOUNT	CONNECT WITH US	NEWSLETTER
8017-15	SITE MULP	ARY ADDOURT	# PACEROOK	1005500E
CHTACT US	SEARCH TERMS.	DRD BIS AND RETURNS	A LANLER	Rever a construction
USTOHER SERVICE	ADVANCED SEARCH		E3 1007088	
RIVACY POLICY			O PHOTENEST	
			h 955	
		E staj Helen	want AC Parts Reseved	Click Allow

Cookie Restriction Notice In Footer

Step 1: Enable Cookie Restriction Mode

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, click **Web**.
- 2. Click to expand the Session Cookie Management section, and do the following:

		۵
3600	[STORE VIEW]	
	[STORE VIEW]	
	[STORE VIEW]	
Yes	[STORE VIEW]	
No	(WEBSITE)	
	Yes	ISTORE VIEW] ISTORE VIEW] Ves ISTORE VIEW]

Cookie Session Management

- 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, set **Use HTTP Only** to "Yes."
- e. Set Cookie Restriction Mode to "Yes."

Step 2: Edit the Cookie Restriction Message

- 1. On the Admin menu, select **CMS > Static Blocks**.
- 2. Find the **Cookie Restriction Notice**, and click to open the block. Then, do the following:

🔞 Mage	rito' Ad	min Pane	H.					Olobal Recor	d Search	Logged in an admin 1 Wooday, April 20, 2014 1 To Magerin Golfe Fire 1 Los O
Detterers		Catalog	-		Provedants	Annalter	CHIS	Reports		
O Lainet Montes	pr. Farminia	e: Charge M	operation in starting	all phone marries	na and callouts had	ter sie isande				This have Taplical, & major, 10 minur and 108 million unmail memory(s). (a) in millioning
Edit Bloc	k 'Cookie	restrictio	n notice	() ()						Conflicts Neurol Conflicter Block @ Save Dance Conflicter Edit
General lotter	with the									
Block Title *			Counte re	etration redice						
bettler*			-	elbichen_notice	,black					
Stare Vew*			En Fre	ðalte on Island gish nich iman		0				
Status *			Enabled			۲				
Content*			61.00	ne (Hills Tamp	· · ·	Name of Street	State 1 in	- T	meen varia	
			-g-Third cooke-re	vetote require disclori model)	costries to provi ("-Privady Policy	be all of its leads page-lan. To a	ires. For a iccept cos	kan bon bu	on on what de alte, please c	ata is contained in the coolies, please see our valiteth "(plane direct_unh")nivacy-polog- cick the Allow buttent below vip-(

Editing the Cookie Restriction Notice

- **a.** Select each **Store View** where the notice should appear.
- b. Set Status to "Enabled."
- c. In the **Content** box, edit the message as needed.
- **3.** When complete, click the **Save Block** button.

Step 3: Update Your Privacy Policy

- 1. On the Admin menu, select CMS > Pages > Manage Content.
- 2. Find your **Privacy Policy** in the list, and click to open the page.
- **3.** In the panel on the left, click **Content.** If necessary, click the **Show/Hide Editor** button to work in WYSIWYG mode.

Content Heading	Privacy Policy	
Show / Hide Editor		
H 😵 B / U 🖛	新聞 御田 Soles ・ Format ・ Fort Family ・ Fort Sce ・	
X 20 20 40 181	話 田田 原作な ∩ ♡ − 示 Φ Ξ ダ 🖗 − − Δ • 💆 •	
31001540	- ¹ / ₂ = ¹ / ₂ - 2 x , x ' Ω = (* *	
日本るたし生い。		
		2
This website ("website") is information collected at thi policy.	operated by Madison Island inc., which includes Madison Island stores, and Madison Island Physie Sales. This physicy policy only co is website, and does not cover any information collected offline by Madison Island. Al Madison Island websites are currently covered b	vers ly this privacy a
SECURITY		
information with high stand identifiable information we and password protections information during data tra	ded on the website and online credit card transactions are transmitted through a secure server. We are committed to handling your performance through a secure server. We are committed to handling your performance through an accuracy and accuracy ac	of personally curity systems irsonal
PRIVACY POLIC	Ŷ	
	al of providing the highest quality products and services, we use information from our interactions with you and other customers, as we respect your privacy, we have implemented procedures to ensure that your personal information is handled in a safe, secure, and ress	
	cy policy in order to explain our information collection practices and the choices you have about the way information is collected and u	sed.
	our website and take advantage of advances in technology to improve the services we offer, this privacy policy likely will change. We this policy on an ongoing basis so that you understand our current privacy policy.	therefore
THE INFORMATI	ION WE COLLECT	
and the firmer and along a	e the website without providing any personally identifiable information. However, we may ask you to provide personally identifiable info	smation at
an.		

Privacy Policy

- **4.** Update your privacy policy to describe the information that your company collects, and how it is used. You can include the information from the tables at the end of this topic.
- **5.** When complete, click the **Save Page** button.

FIELD	DESCRIPTION
Cookie Lifetime	Determines when the browser can delete Magento cookies. The default value is 3600, which means that cookies remain in the browser for one hour. To ensure that cookies expire at the end of a browser session, set the lifetime to zero.
Cookie Path	Allows you to make Magento cookies available other folders. If you want to make cookies available anywhere in a site, you should set this value to a single forward slash.
Cookie Domain	Determines if cookies are visible to subdomains. (http://subdomain.domain.com) To ensure that your cookies are available to all subdomains, enter your domain name with a prefix of a period. (.domain.com)
USE HTTP Only	Makes the cookie available only through HTTP protocol, and unavailable to JavaScript or other scripting languages.

Field Descriptions

Cookie Reference

Magento Standard Cookies

COOKIE NAME	COOKIE DESCRIPTION
USER_ALLOWED_SAVE_ COOKIE	Indicates if a customer is allowed to use cookies.
external_no_cache	A flag that indicates if caching is disabled.
persistent_shopping_ cart	The session key.
Stf	If product links were sent to friends, stores the timestamps in the format: <pre>\$timestamp1, \$timestamp2,, \$timestampN.</pre>
NULIN	A nell ID that indicates if a vate has accurred
<u> </u>	A poll ID that indicates if a vote has occurred.
frontend	Session ID

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.



Product Catalog

In this section...

Navigation

Categories

Attributes

Using a Flat Catalog

Creating Products

Product Information

Inventory

Pricing

Images

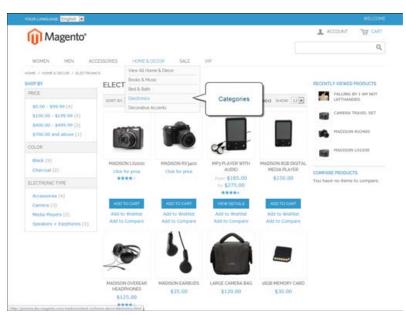
Swatches



CHAPTER 9: Navigation

The term, navigation 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. The category structure of your catalog is the main way people find 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. These are all examples of how categories can be used to navigate throughout your store.

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 list of products. You can also create special designs for category pages that become active for a specific period of time such as for a holiday season or promotion.



Categories in Main Menu

Top Navigation

The main menu of your store displays the selection of categories that are available in your catalog. You can think of the top navigation as different departments in your store. A top-level category serves as landing page for all the subcategories below. The position and presentation of the top navigation might vary by theme, but the way it works is the same.



Top Navigation

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 needed. 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 best. You can set the maximum number of levels that are available in your top navigation in the system configuration.

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 a previous page. Here's an example of a breadcrumb trail from the Magento Demo Store:

HOME/ACCESSORIES/JEWELRY/PEARL STUD EARRINGS

The breadcrumb trail can be configured to appear on CMS content pages, as well as catalog pages. The format and position of the breadcrumb trail varies by theme, but it is usually located in the upper-left, just below the header.

YOURLANDUNCE English 💌		
Magento		1 АССОИНТ ТДУ САЛТ
Uningent	Breadcrumb Trail	Q
WOMEN MEN	SALE VP	
HOME & WOMEN & NEW ADDIVING		
SHOP BY	NEW ARRIVALS	RECENTLY VEWED PRODUCTS

Breadcrumb Trail

To add breadcrumbs to CMS pages:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Web**. Then, do the following:
 - a. Click to expand the **Default Pages** section.
 - b. Set Show Breadcrumbs for CMS Pages to "Yes."
- **3.** When complete, click the **Save Config** button.

efault Pages				
Default Web URL	cms	[5	TORE VIEW]	
CMS Home Page	Madison Island	▼ [S	TORE VIEW]	
Default No-route URL	cms/index/noRoute	[5	TORE VIEW]	
CMS No Route Page	404 Not Found 1	▼ [S	TORE VIEW]	
CMS No Cookies Page	Enable Cookies	▼ [S	TORE VIEW]	
Show Breadcrumbs for CMS Pages	Yes	▼ [S	TORE VIEW]	

Show Breadcrumbs for CMS Pages

Product List Configuration

Product listings can be configured 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 product list has a set of page 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.

YOUR LANSUNGE English 💟 YOUR	rounner US Dellar - USD			WELCOME
Magento*				ACCOUNT THY CART
Uningento				Search entire store here. Q
WOMEN MEN	Switch to	DECOR SALE VIP		
HOME / HOME & DECOR / BOO	List Format			
BOOKS & MUSIC				COMPARE PRODUCTS
SOFT BY Position + #			Bittem(s) SHOW 12	You have no items to compare.
	ALICE'S ADVENTURES WONDERLAND LEWIT GABOUL	2	A second se	COMMUNITY POLL What is your favorite color O creen O ned O tack O Magerta
A TALE OF TWO CITIES \$10,00	ALICE IN WONDERLAND \$5.00	AROUND THE WORLD IN BO DAYS \$5.00	FALLING EVI AM NOT LEFTHANDED \$2.00	
VIEW DETAILS	VIEW DETAILS	VIOW DETAILS	ADD TO CART	
Add to Wishlist	Add to Wishlist	Add to Wahlist	Add to Wishlist	
Add to Compare	Add to Compare	Add to Compare	Add to Compare	

Products Displayed as a Grid

To configure product listings:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Frontend** section.
- 4. Set the default **List Mode** to one of the following:
 - Grid Only
 - List Only
 - Grid (default) / List
 - List (default / Grid

Then, do the following:

- **a.** 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.
- **b.** In the **Products per Page on Grid Default Value** field, enter the default number of products to appear in the grid per page.

- **c.** 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.
- **d.** In the **Products per page on List Default Value** field, enter the default number of products that appear in the list, per page.
- 5. To give customers the option to list all products, set Allow All Products on Page to "Yes."
- 6. Set **Product Listing Sorted** by to the default attribute that is initially used to sort the list.
- 7. 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."
- 8. If you want to allow dynamic references to media assets in category and product URLs, set Allow Dynamic Media URLs in Products and Categories to "Yes."
- **9.** When complete, click the **Save Config** button.

ontend			
.ist Mode	Grid (default) / List	[STORE VEW]	
Products per Page on Grid	9.15.30	(STORE VIEW)	
Allowed Values	+ Comma-separated.		
Products per Page on Grid	9	(STORE VIEW)	
Default Value	+ Must be in the allowed values list.		
Products per Page on List	5,10,15,20,25	(STORE VEW)	
Allowed Values	+ Comma-separated.		
Products per Page on List Default	10	ISTORE VEW]	
Value			
Allow All Products per Page	No	 (STORE VEW) 	
	 Whether to show "All" option in the "Show X Per Po dropdown. 	ge"	
Product Listing Sort by	Best Value	ISTORE VEW)	
Use Flat Catalog Category	Yes	• (GLOBAL)	
Use Flat Catalog Product	Yes	[GLOBAL]	
	- Enable for reindexing a big number of SKUs.		
Allow Dynamic Media URLs in	Yes	[ETORE VEW]	
Products and Categories	 E.g. ([media uris"path/to/mage.jpg")) ([skin uris"path/to/picture.gif")). Dynamic directives parsis impacts catalog performance. 	9	

Configuration Settings for Product Lists

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.

FIELD	SCOPE	DESCRIPTION	
List Mode	Store View	Determines the form Options include:	at of the search results list.
		Grid Only	Formats the list as a grid of rows and columns.Each product appears in a single cell of the grid.
		List Only	Formats the list with each product on a separate row.
		Grid (default / List)	By default, products appear in Grid view, but can be toggled to List view.
		List (default / Grid)	By default, products appear in List View, but can be toggled to Grid view.
Products per Page on Grid Allowed Values	Store View	Grid View. To provid	ber of products displayed in le a selection of options, s separated by commas.
Products per Page on Grid Default Value	Store View	Determines the num page by default, in G	ber of products displayed per rid View.
Products per Page on List Allowed Values	Store View		ber of products displayed in e a selection of options, enter arated by commas.
Products per Page on List Default Value	Store View	Determines the num page by default, in Li	ber of products displayed per ist View.
Allow All Products per Page	Store View	If set to "Yes," incluc "Show per Page" cor	les the "ALL" option in the htrol.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Product Listing Sort by	Store View	Determines the sort order of the search results list. The selection of options is determined by the Display Settings of the category and the available attributes that are set to be "Used for Sorting in Product Listing." The default is set to "Use All Available Attributes," and typically includes: Best Value Name Price
Use Flat Catalog Category	Global	Enables the flat category structure. Options include: Yes / No
Use Flat Catalog Product	Global	Enables the flat product structure. Options include: Yes / No
Allow Dynamic Media URLs in Products and Categories	Store View	Allows dynamic media URLs, rather than static URLs.

Field Descriptions (cont.)

Pagination Controls

The Pagination settings control the format of the pagination links in 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.

<u>^</u>	YOUR CURRENCY US Dollar - U	SD 💌			WELD
Magento	2		_	See	irch entre store here . Q
WOMEN MEN		& DECOR SALE	VP	Pagination Control	
SHOP BY	ELECTRONIC	S			COMPARE PRODUCTS You have no items to compare
PRICE \$0.00 - \$99.99 (6)	SOIT BY Position	• 11 =	1-12 of 13 \$140	V 12 1 2 +	COMMUNITY POLL
\$100.00 - \$199.99 (4) \$400.00 - \$499.99 (2)		-			What is your favorite color
\$700.00 and above (1) COLOR	(ic)	10	-		O Black O Magenta
Black (9)					VOTE
Charcoal (2)	MADISON LX2200 \$400-00	MADISON RX3400 \$815.00	MP3 PLAYER WITH AUDIO	MADISON 8GE DIGITAL MEDIA PLAYER	
Green (2)	Click for price	Click for price	From \$75.00 To: \$275.00	\$150.00	
ELECTRONIC TYPE			****		

Pagination Control

To configure the pagination control:

- 1. On the Admin menu, select **System > Configuration**.
- **2**. In the panel on the left under General, select **Design**.
- 3. Click to expand the **Pagination** section. Then, do the following:
 - **a.** In the **Pagination Frame** field, enter the number of links that you want to appear in the control.
 - **b.** In the **Pagination Frame Skip** field, enter the number of links to skip ahead to display the next set of links in the 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.

Pagination Frame	5	[STORE VIEW]
	How many links to display at once.	
Pagination Frame Skip		[STORE VIEW]
	If the current frame position does not cover utmost	
	pages, will render link to current position plus/minus	
	this value.	
Anchor Text for Previous		[STORE VIEW]
	Alternative text for previous link in pagination menu. If	
	empty, default arrow image will used.	
Anchor Text for Next		[STORE VIEW]
	Alternative text for next link in pagination menu. If	
	empty, default arrow image will used.	

Pagination

4. When complete, click the **Save Config** button.

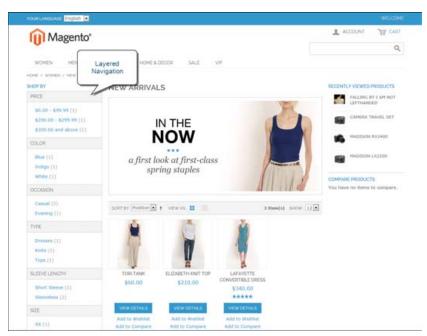
Field Descriptions

FIELD	SCOPE	DESCRIPTION
Pagination Frame	Store View	Determines how many links appear at once in the pagination control.
Pagination Frame Skip	Store View	If the current frame position cannot accommodate the pages, renders the link to the current position, plus or minus this value.
Anchor Text for Previous	Store View	Alternative text for the Previous link in the pagination control. If empty, a default arrow image appears.
Anchor Text for Next	Store View	Alternative text for Next link in pagination control. If empty, a default arrow image appears.

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.

The following instructions show how to set up basic layered navigation. For advanced layered navigation with price steps, see Price Navigation.



Layered Navigation by Category and Price

Step 1: Configure Attributes and Anchor Categories

Make sure that the attribute properties and the anchor categories that are required for layered navigation are configured correctly.

Step 2: Set Up Basic Layered Navigation

- 1. On the Admin menu, select **System Configuration**.
- 2. In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the Layered Navigation section. Then, do the following:

▼ [STORE V	EW]
ze price ranges) 🔻 [STORE V	EW]
	▼ [STORE VI ze price ranges) ▼ [STORE VI

Layered Navigation

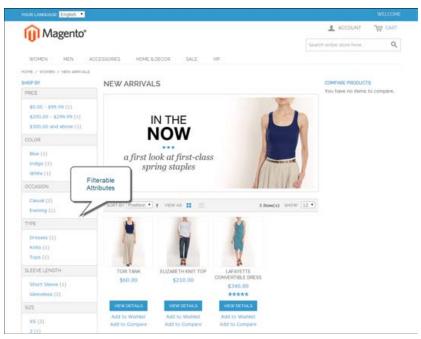
- **a.** To display the number of products found for each attribute, set **Display Product Count** to "Yes."
- b. Set Price Navigation Step Calculation to "Automatic (equalize price ranges)."
- **4.** When complete, click the **Save Config** button.

Filterable Attributes

Layered navigation can be used to search for products by category or by attribute. For example, when a shopper chooses the Apparel/Shoes category from the top navigation, the initial results include all products in the shoes category. The list can be filtered further by choosing a specific color or size, or by specifying values for both color and size. For an attribute to be included in layered navigation, its property settings must be set to make it filterable.

Anchor categories can be set to appear in an additional section that filters the list by attribute value. The attribute section appears only if a category is set to "Is Anchor." Each attribute can be configured to display the number of matching records found.

The attribute properties, combined with the product properties, determine which attributes can be used as filters for layered navigation. Only those with the catalog input type of Dropdown, Multiple Select or Price can be used as filterable attributes.



Filterable Attributes In Layered Navigation

Step 1: Set the Attribute Properties

- 1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
- **2.** Click to open the attribute in edit mode, and do the following:
 - **a.** Scroll down to the Frontend Properties section, and 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."

Step 2: Make the Category an Anchor

- 1. On the Admin menu, select **Catalog > Manage Categories**.
- **2.** In the Categories panel on the left, click to open the category.
- 3. On the Display Settings tab, set Is Anchor to "Yes."
- 4. Click the Save Category button.
- **5.** To test the setting, go to your store and select the category in the top navigation. The selection of filterable attributes for the products in the category appears in the layered navigation.

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 a customer chooses to view 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 layered navigation:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
- **2.** In the upper-left corner, set **Current Configuration Scope** to the store view to be configured.
- 3. Click to expand the Layered Navigation section.
- **4.** If you want to display 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)

Set **Price Navigation Steps Calculation** to "Automatic (equalize price ranges.)" This setting uses the existing price layered navigation algorithm, and is similar to the Automatic option in earlier versions of Magento.

Layered Navigation			۵.
Display Product Count	Yes	٣	[STORE VIEW]
Price Navigation Step Calculation	Automatic (equalize price ranges)	٣	[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		٥
Display Product Count	Yes 🔻	[STORE VIEW]
Price Navigation Step Calculation	Automatic (equalize product counts)	[STORE VIEW]
Display Price Interval as One	No	[STORE VIEW]
Price	This setting will be applied when all prices in the specific price interval are equal.	
Interval Division Limit	9	[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.

ayered Navigation		
Display Product Count	Yes	[STORE VIEW]
Price Navigation Step Calculation	Manual	[STORE VIEW]
Default Price Navigation Step	100	[STORE VIEW]
Maximum Number of Price	10	[STORE VIEW]
Intervals	Maximum number of price intervals is 100	

Manual

6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION		
Display Product Count	Store View		oduct count appears after range, and category. Options	
Price Navigation Step Calculation	Store View	Indicates the method used to determine the price navigation step. Options include:		
		Automatic (equalize price ranges)	Bases the calculation on the price range of products in the group.	
		Automatic (equalize product counts)	Bases the calculation on the number of products in the group.	
			Establishes a threshold for the minimum number of products in the group, to prevent them from being divided into smaller groups.	
		Manual	Uses the division limit that you enter for price intervals.	
Default Price Navigation Step	Store View	Determines the num included in each ste	nber of products that are	
Maximum Number of Price Intervals	Store View		or the number of price r in layered navigation.	

Notes	

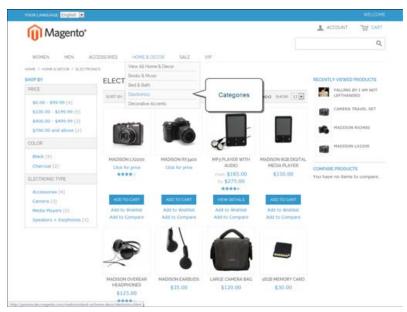


CHAPTER 10: Categories

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

Topics in this chapter:

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



Categories in Main Menu

Category Levels

The number of subcategory levels that you can have in the top navigation is set in the system configuration.By default, there is no limit to the number of levels of subcategories you can set up. In the following image, the Home & Decor category has a depth of two levels.



Subcategory Levels

To set the depth of the top navigation:

- 1. On the Admin menu, select **System > Configuration**.
- **2**. In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Category Top Navigation** section.
- **4.** To place a limit on the number of subcategories that can be used in the top navigation, enter the number in the **Maximal Depth** field.

The default Maximal Depth value is **o**, which does not limit the number of subcategory levels you can have.

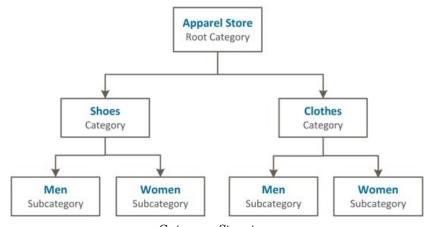
5. When complete, click the **Save Config** button.

Category Top Navigation			٥
Maximal Depth	0	[GLOBAL]	

Category Top Navigation

Creating Categories

When working in the Admin, the category structure 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.



Category Structure

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 menu, select Catalog > Manage Categories.
- **2.** Before you begin, set **Choose Store View** to the store or view. By default, the scope of the category configuration is set to "All Store Views."
- **3.** In the category tree, click the category that is to be the parent of the new category. The parent is the level just above the new category.

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

4. Click the Add Subcategory button.

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Category Tree

Step 2: Complete the General Information

- **1.** In the General Information section, do the following:
 - **a.** (Required) Type 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.** If supported by your theme, you can display a **Thumbnail** image in the main menu for each category. Click the **Choose File** button and select the image to upload.
- **3.** In the **Description** box, enter a paragraph or two of descriptive text for the category landing page.
- **4.** To display an **Image** at the top of the category landing page, click the **Choose File** button and select the image to upload.
- **5.** Complete the category meta data:
 - Page Title
 - Meta Keywords
 - Meta Description
- 6. (Required) To include the category in the main menu, set **Include in Navigation Menu** to "Yes."
- 7. Click the **Save Category** button. Then, take note of the following:

- The new category now appears in the tree. If it's not in the correct position, you can drag it to another location in the tree.
- In addition to the category name, it has an ID number shown in parentheses, just after the name at the top of the page.
- A URL Key that is based on the category name can be automatically generated for the category.

General Information		
Name *	My Category	[STORE VIEW]
Is Active *	Yes 🔻	[STORE VIEW]
URL Key	my-category Create Custom Redirect for old URL	[STORE VIEW]

Category URL Key

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.

Display Settings			
Display Mode	Static block only	T	[STORE VIEW]
CMS Block	Category Landing Page Women	T	[STORE VIEW]
Is Anchor	Yes	T	[GLOBAL]
Available Product Listing Sort By*	Best Value Name Price	Use All Available Attributes	(STORE VIEW)
Default Product Listing Sort By*	Best Value	 Use Config Settings 	[STORE VIEW]
Layered Navigation Price Step	✓ Use Config Settings		[STORE VIEW]

Display Settings

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

- **d.** Clear the checkbox under **Default Product Listing Sort By**. Then select one of the available values to sort the list. By default, all available attributes are listed. The default values typically include:
 - Best Value
 - Name
 - Price
- 2. When complete, click the **Save Category** button.

Modifying Categories

After a category is established, it can be edited, moved to another position in the category tree, or deleted from the catalog. However, if your catalog is live, you should 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 menu, select Catalog > Manage Categories.
- **2.** To move a category, simply drag-and-drop it to a new location. Category order changes are saved automatically.

To delete a category:

- 1. On the Admin menu, select **Catalog > Manage Categories**.
- 2. Click to select the category you want to delete.

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

3. Click the **Delete Category** button to save your changes.

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. The root category is not visible to customers in the store, and does not have a URL key.

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Root Category	image Page The Mella Keywords		ines.	Brow and Brow and Brow and



Step 1: Create a New Root Category

- 1. On the Admin menu, select **Catalog > Manage Categories**.
- **2.** In the upper-left of the Manage Categories page, click the **Add Root Category** button. Then, complete the following required fields:
 - **a.** Enter a **Name** for the root category.
 - **b.** Set **Is Active** to "Yes."
 - c. If you want this root category to be in the main menu, set Include in Navigation Menu to "Yes."
- **3.** Complete the remaining optional fields as needed:
 - a. Click the Choose File to upload a Thumbnail Image for the root category.
 - **b.** Enter a **Description** of the root category.
 - c. Click the **Choose File** button to upload an **Image** to the root category.
 - **d.** Complete the following meta data:

- Page Title
- Meta Keywords
- Meta Description
- 4. Click the **Display Settings** tab. Then, set **Is Anchor** to "Yes."
- 5. When complete, click the **Save Category** button.

Step 2: Add Subcategories to the New Root

- 1. On the Categories page, click the **General** tab.
- **2.** In the category tree on the left, click to select the new root category you created in the last step.
- 3. Click the Add Subcategory button.
- 4. Give the subcategory a Name, and set Is Active to "Yes."
- 5. Click the **Save Category** button.
- 6. Repeat this process to create as many subcategories as you need.

Step 3: Apply the New Root Category to Your Store

- 1. On the Admin menu, select **System > Manage Stores**.
- 2. On the Manage Stores page, under Store Name, click the Main Store link.
- **3.** Change **Root Category** to the new root category.
- 4. Click the **Save Store** button.

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 menu, select **Catalog > Manage 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, click the **Save Category** button.

General Information

On the General Information tab, complete the basic information about the category you are creating or editing. You can enter keywords to improve the way the category is indexed by search engines, create a URL key for the category, and activate or deactivate the category.

General Information		
Name *	Accessories	[STORE VIEW]
Is Active *	Yes 🔻	[STORE VIEW]
URL Key	accessories	[STORE VIEW]
	Create Custom Redirect for old URL	
Thumbnail Image	Choose File No file chosen	[STORE VIEW]
Description		[STORE VIEW]
	WYSIWYG Editor	
Image	Choose File No file chosen	[STORE VIEW]
Page Title		[STORE VIEW]
		[STORE VIEW]
Meta Keywords		[STORE VIEW]
Meta Description		[STORE VIEW]
Include in Navigation Menu *	Yes 🔻	[STORE VIEW]

General Information

FIELD SCOPE DESCRIPTION Name Store View (Required) The category name appears in the navigation, and also in the URL key of the category page and associated product pages. Is Active Store View (Required) To make this category available, select "Yes." Options include: Yes / No **URL Key** Store View The URL Key is a relative path to the category, and is automatically generated when the category is saved. The URL Key must be all lower-case characters, with no spaces. As a best practice, each word is separated by a hyphen. If you edit the default URL key, a custom redirect is created automatically. A root category does not have a URL key. Thumbnail Image Store View 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. Store View Description The category description, if used, appears below the category image- and before the product list. Store View 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.) Page Title Store View The category page title appears in the browser tab and title bar. As a best practice, the title should be not more than twelve words in length, and should include a combination of primary and secondary keywords. Meta Keywords Store View 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,

Field Descriptions

and empty words such as "a," "an," "or" and "that."

FIELD	SCOPE	DESCRIP	TION	
Meta Description	Store View	Enter a description of the category, using approximately twenty-five words or 150 characters.		
Include in Navigation Store View Menu		· · /	d) Determines if the category is included in menu. Options include:	
			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.	

Field Descriptions (cont.)

Display Settings

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

Display Mode	Static block only	T	[STORE VIEW
CMS Block	Category Landing Page Women	T	[STORE VIEW
s Anchor	Yes	¥	[GLOBAL]
wailable Product Listing Sort By *	Best Value Name Price	Use All Available Attributes	[STORE VIEW
Default Product Listing Sort By *	Best Value	 Use Config Settings 	[STORE VIEV

Display Settings

Field	Descriptions
-------	--------------

FIELD	SCOPE	DESCRIPTION
Display Mode	Store View	Determines the content elements displayed on the category page. Options include: Products Only Static Block Only Static Block and Products
CMS Block	Store View	To display a CMS static block at the top of the category page, select the name of the block from the list.
Is Anchor	Global	When set to "Yes," includes the "filter by attribute" section in the layered navigation. Options include: Yes / No
Available Product Listing Sort By	Store View	(Required) The default values are Value, 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	Store View	(Required) To define the default "Sort By" option, clear the "Use Config Settings" checkbox and select an attribute.
Layered Navigation Price Step	Store View	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, including the content blocks and page layout. You can customize a category page its assigned products for a promotion or to differentiate the category from others and increase sales. For example, you might develop distinctive design for a brand or special line of products.

No	[STORE VIEW]
No	[STORE VIEW]
Please Select 🔻	[STORE VIEW]
	[STORE VIEW]
	[STORE VIEW]
1 column 🔻	[STORE VIEW]
<reference> <remove name="rightpoll"></remove> </reference>	[STORE VIEW]
	No Please Select Please Select

Custom Design

To create a custom category design:

- **1.** If the parent category of the selected category has already been customized and you want to use same settings, set **Use Parent Category Settings** to "Yes."
- **2.** To apply the custom design to all the products assigned to the category, set **Apply to Products** to "Yes." Otherwise, the customization applies to only the category page.
- **3.** To apply a different theme to the category, select the theme you want to use from the **Custom Theme** list.
- 4. To apply the category design to a specific range of time, click the calendar 📰 to select both the **Active From** and **Active To** dates. Otherwise, the design will take effect when you save the changes to the category.
- 5. Click the **Save Category** button to save your changes.

Field Descriptions

SCOPE	DESCRIPTION				
Store View	Allows the current category to inherit the design settings from the parent category. Options include: Yes / No				
Store View	Applies the custom s category. Options inc	ettings to all products in the clude: Yes / No			
Store View	Applies a custom theme to the category.				
Store View	The beginning of a date range that specifies the first day the theme is to be used in the store. Th date can be entered or selected from the calend				
Store View	The end of a date range that specifies the last date the theme is to be used in the store. The date can be entered or selected from the calendar				
Store View	Applies a different layout to the category page. Options include:				
	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.			
	Store View Store View Store View Store View Store View	Store ViewAllows the current case settings from the parainclude: Yes / NoStore ViewApplies the custom scategory. Options include: Store ViewStore ViewApplies a custom the first day the theme is date can be entered of the theme is to be us be entered or selecterStore ViewThe end of a date ran the theme is to be us be entered or selecterStore ViewApplies a different lay Options include: No layout updatesStore ViewApplies a different lay Options include: No layout updatesEmpty1 column2 columns with left bar2 columns with left bar			

Category Products

The Category Products tab lists the products that are currently assigned to the category. From the list, you can easily add and remove products from the category.

wom	en (ID: 4	9		Delete Category		
Gener	al Informat	on Display Settings Custom Design Category Products				
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- 65	10 +	Name	SKU	Price	Position	
Any 💌				From:	From:	
				To:	To:	
10	881	Illack Notita Cami-Black-S	wbk002c- Black-S	\$150.00		
10	880	Black Nolfa Cami-Black-XS	wbk062c- Black-XS	\$150.00		
12	679	NoUta Cami-Pink-L	wbk000c- Pink-L	\$150.00		
13	878	Black Nolita Cami	wbk002M	\$150.00		
13	877	Black Nolta Cami	wbk002c	\$150.00		
12	875	Elis Flat	shw005	\$250.00		
13	874	Broadway Pump	shw004	\$410.00		
8	873	Anne Pump	shw003	\$390.00		
13	872	Plaza Platform	shw002	\$320.00		
13	871	Prima Pump	sitw001	\$375.00		
15	870	Hudson Snakeskin Pump	shw000	\$375.00		
15	869	Yuca Sheaker	shm005	\$350.00		
10	868	Studio Dress Shoe	shm004	\$410.00		
10	867	Lenax Boot	shm003	\$550.00		
0	866	Empire Oxford	shm002	\$410.00		
13	865	Broad St Saddle Shoes	shm001	\$390.00		
10	864	Mercer Loafer	shm000	\$310.00		
12	863	Studio Dress Shoe	shm009	5410.00		
15	838	Brooktyn Jean Jacket	Pwt007	\$320.00		

Category Products

To assign products to a category:

- 1. From the category record, click the **Category Products** tab. Then, do the following:
 - **a.** Use the filters and checkbox control to find the products you want to assign:
 - To display all products currently assigned to the category, set the checkbox control to "Yes."
 - To display all products that are not assigned to the category, set the checkbox control to "No."
 - To display all products, set the checkbox control to "Any."
 - **b.** Press the **Search** button.
 - **c.** To list all products again, click the **Reset Filter** button.
- 2. Select the checkbox of each product you want to assign to the category.
- **3.** When complete, click the **Save Category** button.



CHAPTER 11: Attributes

Attributes are the building blocks of your product catalog, and describe specific characteristics of a product. Here are a few ways you can use attributes to enhance the shopping experience:

- Input controls for product options
- Provide additional information on product pages
- Search parameters
- In product comparison reports
- As layered navigation "Shop By" parameters
- In catalog and shopping cart price rules

Each attribute contains a value that describes a characteristic of a product, such as "color" or "fabric." The "color" attribute with the "dropdown" input type might contain many values, although only a few apply to any given product. Because a single attribute can be used with multiple products, your store needs to have only one attribute for color. You can create as many attributes as you need, and assign the most common value as the default, to make it easy for your customers to select the option.

The attributes that make up a product are combined into an attribute set, which is used as template to create new products. The attribute set determines which fields are included in a product, and how they are grouped in the Product Information panel. Magento has a default attribute set with a standard selection of product attributes such as Name, Price, Description, and so on. If you want to keep it simple, you can use the default attribute set for your entire catalog.

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 from a 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.
Fixed Product Tax	Lets you define FPT rates based on the requirements of your locale. To learn more, see: General Tax Settings.

Date & Time Custom Options

You can customize the format of date and time fields, and select the input control used for dates. Dates values can be selected from a drop-down list, or from a popup JavaScript calendar. The following page has an example of each type of date input control.

a LANGUAGE English 🖹 YOUR CURIENCY US Dollar - USD	. WELD
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Unnagento	٩
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Date Input Controls

To format date/time fields:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Date & Time Custom Options** section. Then, do the following:
 - a. To display the JavaScript calendar as an 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 set the **Year Range** for the drop-down year values, enter the year in YYYY format to establish the beginning and ending **from** and **to** dates.

If left blank, the field defaults to the current year.

te & Time Custom Options		
Jse JavaScript Calendar	No	[STORE VIEW]
Date Fields Order	Month 🔽 / Day 🔽 / Year	▼ [STORE VIEW]
Time Format	12h AM/PM	▼ [STORE VIEW]
/ear Range	from to	[STORE VIEW]

Date & Time Custom Options

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Use JavaScript Calendar	Store View	Determines if the JavaScript calendar is used as an input control for date fields. If set to "No," a separate dropdown appears for each part of the date field. Options include: Yes / No
Date Fields Order	Store View	Establishes the order of the three date fields. Options include: Day / Month / Year
Time Format	Store View	Sets the time format to either a twelve or twenty- four hour clock. Options include: 12h AM/PM 24h
Year Range	Store View	Defines the beginning and ending range of years that appear in the drop-down Year field. The value must be entered in YYYY format.

Creating Attributes

The properties of an attribute determine how it can be used in your catalog and how it appears throughout your store. In addition to the basic properties, there are additional properties for drop-down and multiple-select input types, their values, and associated labels. The title, or label, identifies the attribute in the Admin and your storefront. If your store is available in multiple languages, you can enter a different translated label for each language. Attributes can be created with the Manage Attributes tool, and also from inside a product record.

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becor_type	Decor Type	No	No	Yes	Okthar	Yes	Fiterable (with results)		Ne
decorption	Description	Yes	785	110	Stare Vew	745	No		Yes
electronic have	Electronic Type	No	Non	Ves	Ginhal	Ves	Fiberable (with tesuits)		No

Manage Attributes

Process Overview:

Step 1: Assign the Attribute Properties

Step 2: Define the Label and Values

Step 1: Assign the Attribute Properties

- On the Admin menu, select Catalog > Attributes > Manage Attributes. Then, click the Add New Attribute button.
- 2. In the Attribute Properties section, complete the following required (*) properties:
 - **a.** Enter a unique **Attribute Code** to identify the attribute internally. The code should be all lowercase characters without spaces.
 - **b.** In the **Apply To** list, choose each product type that is associated with the attribute.

Attribute Properties	
Attribute Code *	
	A For internal use. Must be unique with no spaces.
	Maximum length of attribute code must be less then 30
	symbols
Scope	Store View
	 Declare attribute value saving scope
Catalog Input Type for Store	Text Field
Owner	
Default Value	
Unique Value	No
Onique value	Not shared with other products
Video Decided	
Values Required	No
Input Validation for Store Owner	None
Apply To *	All Product Types

Attribute Properties

3. Complete the remaining Attribute Properties as needed.

- a. Set **Scope** to the indicate where the attribute can be used.
- **b.** Set **Catalog Input Type for Store Owner** to the type of input control used by the store administrator during data entry.
- **c.** If you want to prevent duplicate values from being entered in this field, set **Unique Value** to "Yes."
- **d.** To require that a value must be entered in the field before the record can be saved, set **Values Required** to "Yes."
- e. To run a validity test of data entered into the field, set Input Validation for StoreOwner to the type of data the attribute should contain.
- 4. In the Frontend Properties section, complete as many of the settings as needed.

Frontend Properties	
Use in Quick Search	No
Use in Advanced Search	No
Comparable on Front-end	No
Use In Layered Navigation	No
	▲ Can be used only with catalog input type Dropdown, Multiple Select and Price
Use In Search Results Layered	No
Navigation	▲ Can be used only with catalog input type Dropdown, Multiple Select and Price
Use for Promo Rule Conditions	No
Position	
	Position of attribute in layered navigation block
Allow HTML Tags on Frontend	Yes
Visible on Product View Page on	No
Front-end	
Used in Product Listing	No
	 Depends on design theme
Used for Sorting in Product	No
Listing	Depends on design theme

Frontend Properties

Step 2: Define the Label and Values

- **1.** In the Attribute Information panel on the left, select **Manage Label / Options**. Then, do the following:
 - **a.** In the Manage Titles section, under Admin, enter a descriptive label to identify the field during data entry.
 - **b.** The next column determines how the label appears in your storefront. You can leave the box blank to use the Admin label as the default.
 - **c.** If your store is available in multiple languages, enter a translated label into each box, as needed.
- **2**. For drop-down or multiple-select input types, do the following:
 - **a.** In the Manage Options section, click the **Add Option** button.
 - **b.** In the new row, under **Admin**, type the value you want to use in your store's Admin.

- **c.** Enter the value you want your customers to see. (Leave blank to use the Admin value as the default.)
- d. If applicable, enter a translated value for each language supported.
- **e.** Enter a number to determine the **Position** of this value in relation to other options in the list.
- f. Select Is Default to automatically select this value.
- g. Repeat these steps for each value you want to add to the list.

🚺 Magento' Admin Pa	nel			Cinhal R	ecord Search	Logged in an admin Turnder, April 29, 2014 - <u>3n: Magerin Gir S</u>	ictime Line.D
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Manage Label / Options for Dropdown Input Type

3. When complete, click the **Save Attribute** button.

The attribute appears in the Manage Attributes list, sorted in alphabetical order by Attribute Code. Use the Page controls to view each page of the list.

Deleting Attributes

If you used sample data while setting up your store, you might have attributes that aren't needed for your catalog. When an attribute is deleted, it is removed from any related products and attribute sets. System attributes are part of the core functionality of your store and cannot be deleted.

To delete an attribute:

- 1. On the Admin menu, select Catalog > Attributes > Manage Attributes.
- 2. In the list, find the attribute and click to open the record.
- 3. Click the **Delete Attribute** button.
- 4. When prompted to confirm, click **OK**.

Creating an Attribute Set

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.

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Derthurd Tales Colony Make Cultures Providers Newslebe	OM1 Res		
D Latinet Wessage: Remainder Change Wegento's default phone numbers and zalituds before site launch			Vise have 1 stifled, 5 major, 19 move and 152 tokice unwest message(s). So to dollar land
Manage Attribute Sets			O A40 Term 340
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Manage Attribute Sets

Your store comes with an initial attribute set called "default" which contains 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 special attributes (fields) needed to describe the product.

A single attribute can be used by as many different attribute sets as is necessary. For example, the attribute "color" can be included in an attribute set for clothing, paint, or for any number of different products.

To create an attribute set:

- 1. On the Admin menu, select Catalog > Attributes> Manage Attribute Sets.
- 2. Click the Add New Set button. Then, do the following:

Edit Set Name		
Name *	▲ For internal use.	
Based On *	Default	
	Edit	Cot Name

Edit Set Name

- **a.** Enter a **Name** for the attribute set.
- **b.** In the **Based On** field, select another attribute set from which this attribute set is to inherit attributes. This option enables you to reuse the attributes already defined in a set to build other attribute sets. The simple option is to leave the Default option that appears in this field.
- 3. Click the Save Attribute Set button. The next page displays the following:
 - The top left of the page shows the name of the attribute set defined earlier. You have the option to edit the name because this value is for internal use.
 - The center of the page shows a hierarchical tree representing Groups for attributes.
 - The right side of the page shows a list of defined attributes that are not assigned to this attribute set.

- **4.** Select the attribute to be assigned to this Group by dragging them from the **Unassigned Attributes** area on the right into the relevant **Group** in the middle of the page.
- 5. When the attribute set is complete, click the **Save Attribute Set** button.



Edit Attribute Set

System Attributes are marked with a dot and cannot be removed from the Groups list. However, you can drag them to another Group in the attribute set.

To create a new attribute group:

- 1. In the Groups section of the attribute set, click the **Add New** button.
- 2. Enter a **Name** for the new group, and click **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 in the Product Information panel for any product that is based on this attribute set.

Attribute Quick Reference

Product Type Properties

PROPERTY	DESCRIPTION
Apply To	Identifies the product types that can use the attribute. Visibility must be set to include the catalog.
Use to Create Configurable Product	Identifies an attribute that is used to create a drop-down list of options for a configurable product.

Data Entry Properties

PROPERTY	DESCRIPTION
Default Value	Displays a common entry as a starting value.
Unique Value	Prevents duplicate values from being entered.
Values Required	Requires a value to be entered before the record can be saved.
Input Validation	Performs a validation check of the data, based on data type, or format.

Search and Navigation Properties

PROPERTY	DESCRIPTION
Use in Quick Search	Lets customers use the Search box to find items based on the value of the attribute.
Use in Advanced Search	Includes the attribute as a field on the Advanced Search form.
Use in Layered Navigation	Includes the attribute in the layered navigation that is displayed for category lists.
Use in Search Results Layered Navigation	Includes the attribute in the layered navigation that is displayed for search results lists.
Position	Determines the position of the attribute when listed with others in the layered navigation list.
Use in Product Listing	(Depending on theme) Includes the attribute in the product listing.
Use for Sorting in Product Listing	(Depending on theme) Includes this attribute as an option in the Sort By list, which can be used to sort a product list.

Rules and Comparison Properties

PROPERTY	DESCRIPTION
Comparable on Front-end	Includes the attribute in the Compare Products report.
Use for Promo Rule Conditions	Allows the attribute to be used as the basis of a condition that triggers a promotional Price Rule or Shopping Cart rule.

Presentation Properties

PROPERTY	DESCRIPTION
Visible on Product View Page	Includes the attribute on the Additional Information tab of the product view page.
Allow HTML Tags on Frontend	Permits text fields and areas to be manually tagged with HTML.
Enable WYSIWYG Editor	Makes the WYSIWYG Editor available for tagging a text field or text area with HTML.

Attribute Properties

The Attribute Properties define the individual characteristics that determine how an attribute can be used in the product catalog.

Attribute Properties	
Attribute Code *	
Autobile Code	For internal use. Must be unique with no spaces.
	Maximum length of attribute code must be less then 30
	symbols
Scope	Store View •
	Declare attribute value saving scope
Catalog Input Type for Store	Text Field 🔻
Owner	
Default Value	
Unique Value	No
	A Not shared with other products
Values Required	No
values Required	NO
Input Validation for Store Owner	None
Apply To *	All Product Types
Apply to	Air Product Types

Attribute Properties

Property Descriptions

PROPERTY	DESCRIPTION		
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		
Catalog Input Type for Store Owner	Determines the data type and input control that is used to manage the product from the store Admin. Options include:		
	Text Field	A single line input field for text.	
	Text Area	A multiple-line input field that can display paragraphs of text formatted with HTML.	

PROPERTY	DESCRIPTION	
	Date	An input field for date values. The date can be typed directly into the field, or selected from a list or calendar.
	Yes/No	A drop-down list with pre-defined options of "Yes" and "No."
	Dropdown	A drop-down list of configurable options, from which only one can be selected.
	Multiple Select	Displays a drop-down list of configurable options. To select more than one option, hold down the Ctrl key and click each item.
	Price	An input type that can be used to create price fields in addition to the predefined attributes: Price, Special Price, Tier Price and Cost.
	Media Image	An additional image that can be included in the attribute set of a product.
	Fixed Product Tax	An input type that gives you the ability to define FPT rates based on the requirements of your locale.
Default Value	Assigns a starting value to the attribute to help during data entry To assign a default value for Multiple Select or Dropdown input types, see: Creating Attributes.	
	A default value cannot be set for Multiple Select, Dropdown, or Fixed Product Tax input types.	
Unique Value	To prevent duplicate values in a data entry field, set Unique Value to "Yes." Options include: Yes / No	

Property Descriptions (cont.)

PROPERTY	DESCRIPTION	
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	
Input Validation for Store Owner	Performs a validation check of the data entered in the field, based on the following options: None	
	Decimal Number	
	Integer Number	
	Email	
	URL	
	Letters	
	Letters (a-z, A-Z) or Numbers (0-9)	
Apply To	(Required) Identifies the product types to which this attribute applies. Options include:	
	All Product Types	
	Selected Product Types	
	Simple Product	
	Grouped Product	
	Configurable Product	
	Virtual Product	
	Bundle Product	
Use to Create Configurable Product	(Dropdown input type only) Select "Yes" if this attribute will be used to create a drop-down list for a configurable product. Options include: Yes / No	

Property Descriptions (cont.)

Attribute Frontend Properties

The Frontend Properties determine how an attribute can be used in your store. You can specify how attributes are used in search, layered navigation, product comparisons, price rules, and sorting. For text attributes, you can enable the WYSIWYG editor and specify if HTML tags can be used to format the value.

Frontend Properties	
Use in Quick Search	No
Use in Advanced Search	No
Comparable on Front-end	No
Use In Layered Navigation	No
	A Can be used only with catalog input type Dropdown, Multiple Select and Price
Use In Search Results Layered	No
Navigation	A Can be used only with catalog input type Dropdown, Multiple Select and Price
Use for Promo Rule Conditions	No
Position	
	A Position of attribute in layered navigation block
Allow HTML Tags on Frontend	Yes 🔻
Visible on Product View Page on	No
Front-end	
Used in Product Listing	No
	Depends on design theme
Used for Sorting in Product	No
Listing	 Depends on design theme

Frontend Properties

Property Descriptions

PROPERTY	DESCRIPTION		
Use in Quick Search	•	ple to be able to search the catalog tribute. Options include: Yes / No	
Use in Advanced Search	Gives shoppers the ability to enter their search criteria through a form. Options include: Yes / No		
	Using too many attributes can slow down search.		
Comparable on Front-end	Select "Yes" to include this a Products report. Options inc	attribute as a row in the Compare lude: Yes / No	
Use In Layered Navigation		and Price input types only) Includes "Shop By" section of layered	
	No	The attribute is not used in layered navigation.	

PROPERTY	DESCRIPTION			
	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			
Use for Promo Rule Conditions	To make the attribute availa "Yes." Options include: Yes	ble for use in price rules, select / No		
Position	Determines the position of the attribute in layered navigation in relation to other filterable attributes.			
Enable WYSIWYG	(Text Area input type only) To display the editor when entering or editing the attribute value, select "Yes." The editor can be used to format field descriptions with HTML tags. Options include: Yes No			
Allow HTML Tags on Frontend		put types only) To be able to format IL tags, select "Yes." Options		
Visible on Product View Page on Front-end		only) To include the attribute on the the product page, select "Yes."		
Used in Product Listing	Depends on the theme. To in summaries that appear in ca	nclude the attribute in product atalog listings, select "Yes."		
Used for Sorting in Product Listing		"Sort By" option for catalog listings,		

Property Descriptions (cont.)



CHAPTER 12: Flat Catalog

Magento typically stores catalog data in multiple tables, based on the Entity-Attribute-Value (EAV) model. Because attributes are stored in many tables, SQL queries can be 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. The flat catalog is updated automatically—either every minute, or according to your cron job. Flat catalog indexing also applies to catalog and shopping 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 first test the configuration in a development environment.

.istMode	Grid (default) / List 🔹	ISTORE VEW]
Products per Page on Grid	9,15.30	ISTORE VIEW]
Allowed Values	+ Comma-separated.	
Products per Page on Grid	9	ISTORE VEW]
Default Value	+ Must be in the allowed values list.	
Products per Page on List	5,10,15,20,25	[STORE VEW]
Allowed Values	 Comma-separated. 	
Products per Pag Value	lowed values list	(STORE VEW)
Flat	Catalan	And the second second
Allow All Products Flat	Catalog	ISTORE VEW]
	Catalog	
How All Products Flat	Catalog .	ISTORE VEW]
	Catalog	
Product Listing Sort by	Catalog v "All" option in the "Show X Per Page" Best Value	Istore vew)
Product Listing Sort by Use Flat Catalog Category	Catalog w "All" option in the "Show X Per Page" Best Value Yes	ESTORE VEW)
Product Listing Sort by Use Flat Catalog Category	Catalog w "All" option in the "Show X Per Page" Best Value Yes Yes	ESTORE VEW)

Use Flat Catalog

Process Overview: Step 1: Enable the Flat Catalog Step 2: Verify the Results

Step 1: Enable the Flat Catalog

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Catalog, select **Catalog**.
- **3.** Click to expand the **Frontend** section. Then, do the following:
 - a. Set Use Flat Catalog Category to "Yes."
 - b. Set Use Flat Catalog Product to "Yes."
- **4**. When complete, click the **Save Config** button.
- **5.** When prompted to refresh the indexes, click the **Index Management** link in the message at the top of the workspace and follow the instructions to reindex the data.

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2 Category Plat Data	Reorganize EAV calegory structure to flat structure	Update on Save	Apr 11, 201	3 8 10 07 PM Eaching Data
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Reindex Required

Step 2: Verify the Results

Method 1: Verify the Results for a Single Product

- 1. On the Admin menu, select **Catalog > Manage Products**. Then, do the following:
 - **a.** 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. Click the Save button.
- 3. On a new browser tab, navigate to the home page of your store.
- 4. Search for the product you edited, and browse to its assigned category.

If necessary, refresh the page to verify 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 menu, select **Catalog > Categories > Manage Categories**.
- 2. In the upper-left corner, set **Current Configuration Scope** to one of the following:
 - All Store Views
 - A specific store view
- **3.** In the panel on the left, select an existing category. Click the **Add Subcategory** button, and do the following:
 - a. In the Name field, enter "Test Category."
 - b. Set Is Active to "Yes."
 - c. Click the Save Category button.

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New Subcategory

- **d.** Click the **Category Products** tab. Then, click the **Reset Filter** button to display all products.
- **e.** Select the checkbox of several products to add them to the new category. Then, click the **Save Category** button.

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Category Products

4. On a new browser tab, navigate to the home page of your store. then, Find the category you created.

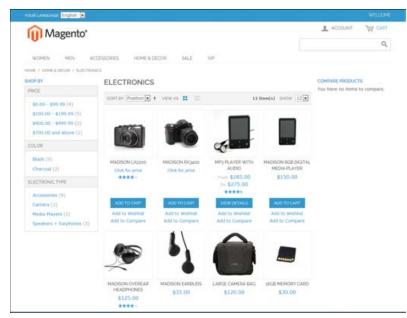
If necessary, refresh the page to verify the results. The change will appear within the minute or according to your cron job schedule.



CHAPTER 13: Creating Products

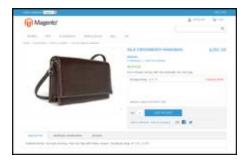
Choosing a product type is one of the first things you must do to create a new product. In this chapter, you will learn how to create a product of each type. To learn more about all the available options, see Product Information.

If you are just starting out, you can create a few sample products and experiment with each type. Before building your catalog, make sure to read Navigation by Category and Catalog URL Options. This material will give you a good understanding of the relationship between your store's navigation, the categories in your catalog.



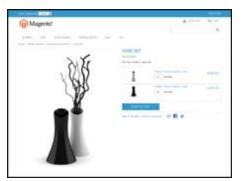
Products in Catalog

Product Types



Simple Product

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



Grouped Product

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



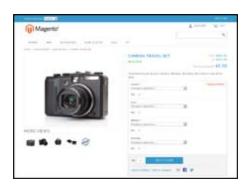
Configurable Product

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

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Virtual Product

Virtual products do not have a physical presence, and are typically used for such things as services, warranties, and subscriptions. Virtual products can be used in association with grouped and bundle products.



Bundle Product

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



Downloadable

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

Simple Product

One of the keys to harnessing the power of product types is learning how and when to use a simple, standalone product. 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.

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Simple Product

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

Process Overview: Step 1: Choose the Attribute Set Step 2: Complete the Basic Information Step 3: Complete the Remaining Product Information

Step 1: Choose the Attribute Set

The first step is to choose the attribute set, which is used as a template for the product record. The product in this example is based on the Default attribute set, which includes a standard of set of fields that can be used for most products.

- 1. On the Admin menu, go to **Catalog > Manage Products**.
- 2. In the upper-right corner of the Manage Products page, click the Add Product button.
- 3. In the Create Product Settings section, do the following:
 - a. Accept the "default" Attribute Set, or select another.
 - **b.** Set **Product Type** to "Simple," and click the **Continue** button.

Create Product Settings		
Attribute Set	Default	
Product Type	Simple Product	×
	 Continue 	

Create Product Settings

Step 2: Complete the Basic Information

The basic set of required fields must be completed before the product record can be saved. The Product Information panel groups related fields by topic and the required fields are marked with a red asterisk (*).

- **1.** In the Product Information panel, select **General**. Then, complete the required fields as follows:
 - **a.** Enter the product **Name** as you want it to appear in all catalog listings.
 - **b.** In the **Description** box, enter the main description that will appear on the Product Detail page.
 - c. Enter a Short Description of the product.
 - d. Assign a unique **SKU** for the product.
 - e. Enter the **Weight** of the product, which is used to calculate shipping.
 - f. Set Status to "Enabled."
 - g. Set Visibility to "Catalog, Search."

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Set Product as New to Date		(WEBSITE)
Status *	- Please Select -	pagasaraj
URL Key		ISTORE VEW
Visibility*	Catalog, Search	ISTORE VIEW

General

- **2.** In the Product Information panel, select **Prices**. Then, complete the required fields as follows:
 - a. Enter the **Price** that you will charge for the product.
 - **b.** Set **Tax Class** to the appropriate tax classification for the product.

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Manufacturer's Suggested Retail Price	[USD]					101.084
Tax Class *	- Please Select					WEBSIT

3. In the Product Information panel, select **Inventory**. Then, do the following:

a. If you do not need to keep track of inventory for the product, set **Manage Stock** to "No."

Depending on the configuration, you might need to clear the Use Config Settings checkbox.

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Inventory with No Stock Management

- **b.** If you want to keep track of inventory, set **Manage Stock** to "Yes." Then, do the following:
 - In the **Qty** field, type the quantity of the item that is currently in stock.
 - Set Stock Availability to "In Stock."

Manage Stock	Vez +	[OLOB
	2 Use Config Settings	
Qty*	100	Enter Quantity on Hand
Qty for item's Status to Become	0	loroe
Out of Stock	V Use Config Settings	
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Oty Uses Decimats	No	(OLOBAL)
Can be Divided into Multiple	NO	(GLOBAL)
Bakes for Shipping		
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Notify for Quantity Elelow	1	In Stock
	2 Use Config Settings	in oroon
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	Vise Config Settings	
Stock Availability	In Stock	[OLOBAL]

Inventory with Stock Management

- **4.** To be visible in your catalog, the product must be assigned to a category. To assign the product to a category, do the following:
 - a. In the Product Information panel, select Categories.
 - **b.** In the category tree, click to expand the section where the item belongs.
 - c. Select the checkbox of each category where you want the product to appear.
- **5.** If your Magento installation has multiple websites, the product must be assigned to each one where the product is available for sale. (This option appears only if multiple websites exist in the store hierarchy.) To configure the scope of the product, do the following:

- a. In the Product Information panel, select Websites.
- **b.** On the Websites tab, select the checkbox of each website where the product is available for sale.
- 6. After completing these steps, click the **Save and Continue** button.

At this point, the product should be visible on the assigned category page of your catalog. Until the product image is uploaded, a placeholder appears in its place.

Step 3: Complete the Remaining Product Information

Although not required, there is still more product information to complete. At the very least, you will want to upload product images and complete the meta data. In addition, you can create additional custom options.

THINGS TO REMEMBER



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.



Custom options are not tracked as separate inventory items.



A simple product that is included in a configurable, or bundle product type cannot have custom options.

Grouped Product

A grouped product is made up of multiple, standalone products that are presented as a group. You can offer variations of a single product, or group them by season or theme to create a coordinated set. Each product can be purchased separately, or as part of the group.

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Grouped Product

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

Process Overview: Step 1: Create the Grouped Product Step 2: Add the Associated Products Step 3: Configure the Shopping Cart Thumbnails

Step 1: Create the Grouped Product

The first step is to choose the attribute set, which is used as a template for the product record. The product in this example is based on the Default attribute set, which includes a standard of set of fields that can be used for most products.

- 1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
- 2. In the Create Product Settings section, do the following:
 - **a.** Select the **Attribute Set** you want to use as a template for the product.
 - **b.** Set **Product Type** to "Grouped Product," and click the **Continue** button.

Create Product Settings			
Attribute Set	Default		
Product Type	Grouped Product		
	O Continue		

Create Product Settings

- **3.** Complete the main configuration settings as you would for a simple product, with the following exceptions:
 - A grouped product does not have price options because the price of each item in the group originates from the associated product.
 - On the Inventory tab, you can set quantity increments and stock availability for the group as a whole, but the inventory of individual items is managed by the individual associated products.
- 4. Click the **Save and Continue** button.

Step 2: Add the Associated Products

1. In the Product Information panel on the left, select **Associated Products**. Then, do the following:

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Associated Products

- **a.** To display the complete unfiltered list, click the **Reset Filter** button.
- **b.** If you need help finding the products you want, use the filter controls at the top of a column.
- c. Select the **checkbox** of each product that you want to include.
- **d.** To list only the products you have selected, set the filter control at the top of the checkbox column to "Yes." Then, click the **Search** button.
- 2. Click the **Save** button to save your changes.

Step 3: Configure the Shopping Cart Thumbnails

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, select **Checkout**.
- **3.** Click to expand the **Shopping Cart** section. Then, set **Grouped Product Image** to one of the following:
 - Product Thumbnail Itself
 - Parent Product Thumbnail

Shopping Cart				۲
Quote Lifetime (days)	30		[WEBSITE]	
After Adding a Product Redirect to Shopping Cart	Yes	۲	[STORE VIEW]	
Grouped Product Image	Product Thumbnail Itself	•	[STORE VIEW]	
Configurable Product Image	Parent Product Thumbnail	۲	[STORE VIEW]	

Shopping Cart Thumbnails

4. Click the **Save Config** button to save the setting.

THINGS TO REMEMBER

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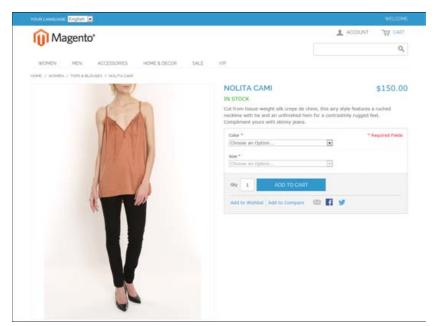
A grouped product is essentially a collection of simple associated products.

- Simple and virtual products associated with 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 product record, or from the associated product.

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. Products with multiple options are sometimes referred to as composite product.

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



Configurable Product

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

Process Overview:

Step 1: Create Attributes for Drop-down Options

Step 2: Create the Attribute Set

Step 3: Create the Configurable Product

Step 4: Add the Associated Products

Step 5: Make Any Necessary Price Adjustments

Step 6: Configure the Shopping Cart Thumbnails

Step 1: Create Attributes for Drop-Down Options

Create an attribute for each drop-down list of options that you want to include in the configurable product. If the attribute already exists and has the correct properties, you can add it to the attribute set in the next step. To learn more, see: Creating Attributes.

Required Attribute Properties

PROPERTY	SETTING
Scope	Global
Catalog Input Type for Store Owner	Dropdown
Apply to	Configurable Product or All Product Types
Use to Create Configurable Product	Yes

Step 2: Create the Attribute Set

- On the Admin menu, select Catalog > Attributes > Manage Attribute Sets. Then, click the Add New Set button.
- 2. Assign a Name to the attribute set.
- **3.** In the **Based On** list, select an existing attribute set, such as "Default," to use as a template. Then, click the **Save Attribute Set** button.
- **4.** Starting from the list of **Unassigned Attributes**, drag and drop each attribute you want to include in the product to the center column. You can arrange them in any order.
- **5.** To group the attributes in their own section of the Product Information panel, do the following:
 - a. In the Groups section, click the Add New button.

If prompted by your browser, select "Temporarily Allow Scripted Windows" to continue. Then, click the Add New button again. **b.** When prompted, enter a **Name** for the new group. Then, click the **OK** button.

The new group appears at the bottom of the Groups column.

c. Drag and drop each attribute that you created for the drop-down options to group where you want them to appear.



Attribute Set

- 6. Click the Save Attribute Set button.
- **7.** When prompted to update your cache, click the link in the message and refresh the invalid cache.

Step 3: Create the Configurable Product

- 1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
- 2. In the Create Product Settings section, do the following:
 - a. Select the Attribute Set that you created for the product.
 - **b.** Set **Product Type** to "Configurable Product," and click the **Continue** button.

Create Product Settings			
Attribute Set Product Type	My Attribute Set		
	Continue		

Create Product Settings

3. In the Select Configurable Attributes section, select the checkbox of each attribute that you want to include in the product. Then, click the **Continue** button.



Select Attributes

- **4.** Complete the Product Information as you would for a simple product, with the exception of the following fields:
 - On the **Prices** tab, the Price is a required field, but is used as a default price. The price of each individual associated product can be adjusted accordingly.
 - On the **Inventory** tab, **Manage Stock** is set to "No" by default, because inventory is managed by each associated product.
- 5. When complete, click the **Save and Continue Edit** button.

Step 4: Add the Associated Products

Process Overview: Method 1: Quick Simple Product Creation Method 2: Create Empty Method 3: Copy from Configurable

- 1. In the panel on the left, select the last option, **Associated Products**.
- 2. Then, use one of the following methods to add the associated products.

Method 1: Quick Simple Product Creation

This method automatically creates the associated products and optionally, assigns a Name and SKU to each one.

- 1. In the Quick Simple Product Creation section, the Name and SKU are set to Autogenerate, which makes it easy to see which products belong to the configurable product,. However, if you want to change the default value, you can clear the checkbox and enter a different value.
- **2**. For each associated product that you want to create, do the following:
 - a. Enter the **Weight**.
 - b. Set Status to "Enabled."
 - **c.** To prevent the associated products from being listed individually in the catalog, set **Visibility** to "Not Visible Individually."

- 3. To complete the fields for the drop-down lists, do the following:
 - **a.** For each of the configurable attributes that you set up, select the values that apply to the first product.
 - b. Enter the Qty, and set Stock Availability to "In Stock."
 - c. Click the Quick Create button to create the associated product record.

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	Autogenerate		
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	Price: Fixed .		
kze *	6 Price: Fixed .		
	Price: Fixed		
2fy *	10		
tock Availability	In Stock		

Quick Simple Product Creation

- **4**. To create additional associated products, do the following:
 - a. Select the value for each configurable attribute.
 - **b.** If there is an extra charge for the selection, enter the adjustment in the **Price** field.
 - c. Click the Quick Create button.

Repeat this step to create as many associated product as you need. As each associated products is created, it appears in the list at the bottom of the page.

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N	885	My Configurable Product-Black-B	My Attribute Set	ABC 456- Black-8		\$50.00	In Stock	E	Black	8	68
10	805	My Configurable Product-Black-10	My Attribute Set	ABC 456- Black-10			In Stock	1	Diack	10	12

List of Associated Products

Method 2: Create Simple Associated Product

This method opens a blank Product Information form, which you can complete for each associated product.

- 1. In the Create Simple Associated Product section, click the **Create Empty** button. A pop-up window with a blank Product Information form appears.
- 2. Complete the required fields as you would for any simple product.

3. Click the Save button to add the associated product.

Method 3: Copy from Configurable

This method opens a Product Information form that contains the values already entered for the configurable product. The only fields that need to be completed are the Name, SKU, and values for each drop-down attribute.

- 1. In the Create Simple Associated Product section, click the **Copy From Configurable** button. A pop-up window with the basic Product Information from the configurable product appears.
- **2.** Complete the following required fields:
 - SKU
 - Weight
- 3. Complete the fields with values for each drop-down list.
- **4.** Click the **Save** button to add the associated product to the configurable product record.

Step 5: Make Any Necessary Price Adjustments

Use the Super Products Attributes Configuration section to make price adjustments to a specific associated product. The adjustment can be entered as a fixed value or percentage, and is made in relation to the price of the configurable product.

Price values for o	ptions should be specified in system base cur	rency.			
	can be specified per store.				
Color	Attribute Name: Color	00	e default (Color)		
	Option: Black	Price	Fixed		
Size	Attribute Name: Size	E VI	e default (Size)		
	Option: 6	Price	Fixed	1	
	Option 8	Price	Fixed	-	

Super Products Attributes Configuration

Step 6: Configure the Shopping Cart Thumbnails

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Checkout**.
- **3.** Click to expand the **Shopping Cart** section. Then, set **Configurable Product Image** to one of the following:
 - Product Thumbnail Itself
 - Parent Product Thumbnail

Shopping Cart			۵
Quote Lifetime (days)	30	[WEBSITE]	
After Adding a Product Redirect to Shopping Cart	Yes	▼ [STORE VIEW]	
Grouped Product Image	Product Thumbnail Itself	▼ [STORE VIEW]	
Configurable Product Image	Parent Product Thumbnail	▼ [STORE VIEW]	

Shopping Cart Thumbnails

4. Click the **Save Config** button to save the setting.

THINGS TO REMEMBER



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

- The drop-down list values are based on attributes that must be set up in advance with required settings. The attribute Scope must be set to "Global," and Use to Create Configurable Product must be "True." The drop-down attributes must be included in an attribute set, which is then used as a template for the configurable product.
- The simple products associated with a configurable product cannot include custom variants or options, and must be based on the same attribute set that is used to create the configurable product. The associated products can be generated automatically from inside with configurable product record.
- The thumbnail image in the shopping cart can be set to display the image from the configurable product record, or from the associated product.

Virtual Product

Although virtual products are not physical in nature, they do represent something that can be sold, such as a membership, service, warranty, or subscription. Virtual products can be sold individually, or included as part of the following product types:

- Grouped Product
- Bundle Product

The process of creating a virtual product and a simple product is nearly the same. However, because a virtual product is not shipped, there is no Weight field or option to include a gift card.

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Madison Island		ers are allowed unlimited purchases with VIP pricing, howe to cancel your order in certain circumstances. This may occ	

Virtual Product

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

Process Overview: Step 1: Choose the Attribute Set Step 2: Complete the Required Fields Step 3: Complete the Remaining Product Information

Step 1: Choose the Attribute Set

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. In the upper-right corner of the Manage Products page, click the **Add Product** button.
- 3. In the Create Product Settings section, do the following:
 - a. Accept the "default" Attribute Set, or select another.
 - b. Set Product Type to "Virtual Product," and click the Continue button.

Create Product Settings	
Attribute Set	Default
Product Type	Virtual Product
	Continue

Create Product Settings

Step 2: Complete the Required Fields

Complete the required fields as you would for a simple product. The only difference is that a virtual product has no weight. All required fields are marked with a red asterisk (*).

- 1. On the **General** tab, complete the required fields as follows:
 - **a.** Type the product **Name** as you want it to appear in all catalog listings.
 - **b.** In the **Description** box, enter the main description that will appear on the product view page.
 - c. Enter a Short Description of the product.
 - d. Assign a unique **SKU** to the product.
 - e. Set Status to "Enabled."
 - f. Set **Tax Class** to the appropriate setting for your area.
 - g. Set Visibility to "Catalog, Search."
- 2. On the **Prices** tab, enter the Price you intend to charge for the product or service.
- **3.** If you're not going to manage your inventory, you can skip this section. Otherwise, complete the required fields on the **Inventory** tab as follows:

- a. Under Manage Stock, clear the Use Config Settings checkbox. Then, set Manage Stock to "Yes."
- **b.** In the **Qty** field, enter the quantity of the item currently in stock.
- c. Set Stock Availability to "In Stock."
- **4.** If applicable, on the **Website** tab, select the checkbox for the website where the product or service will be available for sale.
- 5. On the **Categories** tab, assign the product to the appropriate categories, as follows:
 - **a.** In the Product Category tree, click to expand the section where the item belongs.
 - **b.** Select the checkbox to assign the product to each category where you want the product to be listed in the catalog.
- 6. When the required fields are complete, click the **Save and Continue** button.

Step 3: Complete the Remaining Product Information

You have now completed the required fields. The next step is to complete the rest of the product information as needed for this product. The meta information and product images are a good place to start.

THINGS TO REMEMBER



Virtual products can be used for anything that is not physical in nature, such as services, subscriptions, and warranties.



Virtual products are much like simple products, but without the Weight and Allow Gift Message fields.



Shipping Options appear during checkout only if there is also a physical 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

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MORE VIEWS	Oty: ()
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Bundle Product

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

Process Overview: Step 1: Create the Bundle Product Step 2: Complete the Product Information Step 3: Add Bundle Items

Step 1: Create the Bundle Product

- 1. On the Admin menu, select **Catalog > Manage Products**. Then, click the **Add Product** button.
- 2. In the Create Product Settings section, select the **Attribute Set** for the product.
- **3.** In the Create Product Settings section, do the following:
 - a. Accept the "default" Attribute Set, or select another.
 - b. Set **Product Type** to "Bundle Product." Then, click the **Continue** button.

Create Product Settings	
Attribute Set	Default 💌
Product Type	Bundle Product
	Continue

Create Product Settings

Step 2: Complete the Product Information

- **1.** Complete the product information as you would for a simple product, with the exception of the following:
 - a. On the **General** tab, set both the **SKU** and **Weight** fields to one of the following:
 - Dynamic
 - Fixed

If using a fixed SKU or Weight, enter the actual value in the field to the right.

SKU *	Dynamic 💌 ABC 234	[GLOBAL]
Weight *	Fixed 2.25	[GLOBAL]

Dynamic SKU and Weight

- **b.** On the **Prices** tab, set **Price** to one of the following:
 - Dynamic
 - Fixed

If using a fixed price, enter the actual value in the field to the right.

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

nices			O Create New Attribute
Price *	Dynamic - Select	lneol	IOLOBALI
Group Price	Cynamic Fixed	Fixed or And Group Price	
Special Price		Dynamic Pricing	Jorgewit
Special Price From Date		Priority	(WERSTE)
Special Price To Date	1		(WEBSITE)
Tier Price	Website Ca	etomer Group Oty Percent Discount Action	
Apply MAP	No		(WEBSITE
Display Actual Price	Use config	Price View	(vetastarte)
Manufacturer's Suggested Retail		Price view	laraevri
Price	lnzol		
Tax Class *	Norm		[WEBISFTE]
Price View *	Price Range		(GLOBAL)

Dynamic Price

- **c.** Then, set **Price View** to one of the following:
 - As Low as
 - Price Range
- 2. Click the Save and Continue Edit button.

Step 3: Add Bundle Items

- 1. In the Product Information panel on the left, select the last option, **Bundle Items**.
- 2. Then in the Shipment section, set Ship Bundle Items to one of the following:
 - Together
 - Separately



- 3. In the Bundle Items section, click the Add New Option button.
- **4.** In the **Default Title** box, enter a label for the bundle item, as you want it to appear on the Customize Product page. Then, do the following:

de llems			C Add New Option
Default Title * 🖪	ly Bundle Item		O Delete Option
Input Type Drop-down	Is Required Positi	ion .	
Drop-down	· Yes ·	O Add Selection	

Bundle Items

- **a.** Set **Input Type** to one of the following:
 - Drop-down
 - Radio Buttons
 - Checkbox
 - Multiple Select
- **b.** Set **Is Required** as needed.
- **c.** In the **Position** field, enter the order that you want this item listed in relation to other items included in the bundle.
- 5. Click the Add Selection button. Then, do the following:

age 1 of 1 pages View 20 💌 per page Total 0 records found					Reset Filter Search		
ID 🕴	Product Name	Attrib, Set Name	зки	Price	- 0	Oty to Add	
				From:	Any 🕶		
				To:			

Select Products

- a. Click the **Reset Filter** button to display the unfiltered list of products.
- **b.** Select the checkbox of each product that you want to include in this item.
- c. In the Qty to Add column, enter the quantity of each item to be included.
- 6. Click the **Add Selected Product(s) to Option** button. When the items appear in the Bundle Items list, do the following:
 - a. Set **User Defined Qty** to one of the following:
 - Yes Displays an input box so the customer can change the quantity.
 - No Prevents the customer from changing the default quantity.
 - **b.** Enter a number in the **Position** column of each item to determine its place in relation to other items.

c. To make an item the default selection, select the **Default** option of the item to be pre-selected in the form.

efault Title * Elis Flat				e) Deirte	Option
nput Type Is Required Position					
Drop-down Yes O Add Select					
Name	Default Gty	User Defined Gty	Position	Default	
Elles Flat SKU: shw0055	1	Yes 🔹	0	0	0
Ellis Flat SKU: shw0057	1	Yes 🔹	0	0	0
Ellis Flat SKU: shw0058	1	Yes 💌	0		0
Ellis Fiat SKU: shw0059	1	Yes 💌	0	0	0
Ellis Flat SKU: shw00510	1	Yes 💌	0	0	0

Bundle Items

- 7. Repeat steps 3-7 for each bundle item you want to include.
- 8. When complete, click the **Save** button to save the bundle product.

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

$\mathbf{\nabla}$	A bundle is a "build your own" product.
$\mathbf{\nabla}$	Bundle items can be simple or virtual products without custom options.
$\mathbf{\nabla}$	The Price View can be set to a price range or "As Low As."
$\mathbf{\nabla}$	SKU and Weight can be either "Fixed" or "Dynamic."
$\mathbf{\nabla}$	The Quantity can be set to a pre-set or user-defined value.
	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 an 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 or a clip from an audio file, that the customer can try from the product page.

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Download with Sample

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.

The files for download can be either uploaded to your server, or linked to on a different server on the Internet.

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

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

Process Overview:

Step 1: Choose the Attribute Set

Step 2: Complete the Basic Product Information

Step 3: Complete the Download Information

Step 4: Complete the Samples Information

Step 5: Complete the Remaining Product Information

Step 1: Choose the Attribute Set

The first step is to choose the attribute set, which is used as a template for the product record. The product in this example is based on the Default attribute set, which includes a standard of set of fields that can be used for most products.

- 1. On the Admin menu, go to Catalog > Manage Products.
- 2. In the upper-right corner of the Manage Products page, click the **Add Product** button.
- 3. In the Create Product Settings section, do the following:
 - a. Attribute Set is currently set to "Default." You can leave it as it is, or select another.
 - **b.** Set **Product Type** to "Downloadable Product," and click the Continue button.

Create Product Settings			
Attribute Set	Default	•	
Product Type	Downloadable Product	•	
	Ocontinue		

Create Product Settings

Step 2: Complete the Basic Product Information

The basic set of required fields must be completed before the product record can be saved. The Product Information panel groups related fields by topic and the required fields are marked with a red asterisk (*).

- **1.** In the Product Information panel, select **General**. Then, complete the required fields as follows:
 - **a.** Enter the product **Name** as you want it to appear in all catalog listings.
 - **b.** In the **Description** box, enter the main description that will appear on the Product Detail page.

- c. Enter a Short Description of the product.
- d. Assign a unique **SKU** for the product.
- e. Set Status to "Enabled."
- f. Set Visibility to "Catalog, Search."
- **2.** In the Product Information panel, select **Prices**. Then, complete the required fields as follows:
 - a. Enter the **Price** that you will charge for the product.

The price entered here becomes the base price of the download and is listed in the catalog before the customers selects items for download. Any additional price that is associated with an individual download is added to the base price.

- **b.** Set **Tax Class** to the appropriate tax classification for the product.
- 3. In the Product Information panel, select Inventory. Then, do the following:
 - **a.** If you do not need to keep track of inventory for the product, set **Manage Stock** to "No."
 - **b.** If you do need to keep track of inventory, set **Manage Stock** to "Yes." Then, do the following:
 - Set Manage Stock to "Yes."
 - In the **Qty** field, type the quantity of the item that is currently in stock.
 - Set Stock Availability to "In Stock."
- 4. In the Product Information panel, select **Categories**. Then, do the following:
 - **a.** In the category tree, click to expand the section where the item belongs.
 - b. Select the checkbox of each additional category where you want the product to appear.
- **5.** To make the product available on multiple websites, it must be assigned to each one. (This option appears only if you have multiple websites.) To configure the scope of the product, do the following:
 - a. In the Product Information panel, select Websites.
 - **b.** Select the checkbox of each website where the product will be available for sale.
- 6. After completing these steps, click the **Save and Continue Edit** button.

Step 3: Complete the Download Information

- 1. In the Product Information panel, select **Downloadable Information**.
- **2.** In the Links section, do the following:
 - **a.** Enter a **Title** for the list of downloadable products.
 - **b.** Set **Links can be purchased separately** to one of the following:
 - If you want to offer multiple download links, such as to sell individual songs on an album, select "Yes."
 - To offer a single download of this item, select "No."
- **3.** Click the **Add New Row** button, and do the following:
 - **a.** Enter the **Title** and **Price** of the download.
 - b. To limit the number of downloads a customer can make, enter the number in the Max number of downloads field. To allow unlimited downloads, select the Unlimited checkbox.
 - c. Set Sharable to your preference.
 - To require that customers log in to their accounts to access the download link, select "No."
 - To send the link by email, which the customer can then share with others, select "Yes."
- **4.** Under **Sample**, use one of the following methods to deliver a sample of the downloadable product.
 - Select the **File** option. Then, click the **Browse** button, and select the sample file to upload to the server.
 - Select the URL option. Then, paste the full URL of the sample file.
- 5. Under File, use one of the following methods to deliver the actual downloadable product.
 - Select the **File** option. Then, click the **Browse** button, and select the file to upload.
 - Select the **URL** option. Then, paste the full **URL** of the file that is available for download.
- 6. In the **Sort Order** field, enter a number to indicate the sequence that this download will be listed with other downloads on the product page.
- 7. To add another download, click the Add New Row button, and repeat the process.

nks										
Title		C	Check Items to Download		[STORE VIEW]					
Links (separa	can be pu ately	rchased	N	D		T	[GLOBAL]			
Title *	Price		Max. Download	s Shareable	Sample		File		Sort Order	
Fallin	0.00	0.00 [USD] 0) [USD] 0 Use c	Use config 🔻			File:	falling x i am no	0	8
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			 Unlimited 			(2.25 MB)	URL:	O Add New	Row Upload	Files

Links

- 8. When complete, if uploading files to the server, click the **Upload Files** button.
- 9. Click the Save and Continue Edit button.

Step 4: Complete the Samples Information

- 1. Click to expand the **Samples** section.
- 2. Enter a **Title** for the section of samples on the product page.
- 3. Click the Add New Row button. Then, do one of the following:
 - Select the **File** option. Then, click the **Browse** button, and select the sample file to upload.
 - Select the URL option. Then, paste the full URL of the sample file.

Samples			۲
Title	Samples	[STORE VIEW]	
Title *			File Sort Order
		0	Add New Row Upload Files
Alphanumeric, dash and u	inderscore characters are recommended for filenam	es. Improper characters are replaced with '_'.	

Add New Sample

- 4. To add a new row, click the Add New Row button, and repeat the process.
- 5. When complete, click the **Save** button.
- 6. When prompted to refresh the index and cache, click the links in the message at the top of the workspace, and follow the instructions.

At this point, the product should be visible on the assigned category page of your catalog. Until a product image is uploaded, a placeholder appears in its place.

Step 5: Complete the Remaining Product Information

Although not required, there is other product information to complete. At the very least,

you will want to upload product images and complete the meta data.

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 purchasing downloadable products 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.

Downloadable Product Options

The configuration settings determine guest checkout, default values, and delivery options for downloadable products.

To configure downloadable options:

- 1. On the Admin menu, select **System > Configure**.
- **2**. In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Downloadable Product Options** section.
- 4. Configure the options as described in the following field descriptions.
- 5. When complete, click the **Save Config** button.

wnloadable Product Options		
Order Item Status to Enable Downloads	Invoiced v	[WEBSITE]
Default Maximum Number of Downloads	0	[WEBSITE]
Shareable	No	[WEBSITE]
Default Sample Title	Samples	[STORE VIEW]
Default Link Title	Links	[STORE VIEW]
Open Links in New Window	Yes	[WEBSITE]
Use Content-Disposition	inline	[STORE VIEW]
Disable Guest Checkout if Cart Contains Downloadable Items	Yes A Guest checkout will only work with shareable.	[WEBSITE]

Downloadable Product Options

Field Descriptions

FIELD	SCOPE	DESCRIP	TION
Order Item Status to Enable Downloads	Website	Determines the status that an order must have before downloads become available. Options include: Pending / Invoiced	
Default Maximum Number of Downloads	Website		the default number of downloads a customer.
Shareable	Website		if customers must log in to their access the download link. Options
		Yes	Allows the link to be sent by email, which can then be shared with others.
		No	Requires customers to log in to their accounts to access the download link.
Default Sample Title	Store View	The default	title for all sample files.
Default Link Title	Store View	The default link for all downloadable titles.	
Opens Links in New Window	Website	Determines if the download link opens in a new browser window. Options include: Yes / No	
Use Content Disposition	Store View	content is d	how the link to the downloadable elivered, as an email attachment, or link in a browser window. Options
		Attachmer	t The download link is delivered as an email attachment.
		Inline	The download link is delivered as an inline link on a web page.
Disable Guest Checkout if Cart Contains Downloadable Items	Website	Determines if guests who are purchasing downloadable products must log in to an accor to complete the checkout process. Options Include:	

FIELD	SCOPE	DESCR	IPTION
		Yes	If the cart contains downloadable products, the guest will have to either register for an account, or login to an existing account to complete the purchase.
		No	The download link is delivered as an inline link in the body of the email message.
			heckout is only available for download s if Sharable is set to "Yes."



CHAPTER 14: Product Information

The Product Information panel provides access to the full range of settings that make up a product record. The information in this section can be used for reference when creating a product of any type.

The selection of Product Information tabs, and the organization of the fields on each page is determined by the attribute set that was used to create the product.

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General	Name*	Autro Chic Eyeplacost		Distant Alive	
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Images					
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Design					
OR Options					
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Cross-cells					
Product Reviews					
Product Tage					
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	Volume *	Catalog Search		printed verse	
	Country of Manufacture			348878	

Product Information

General

Use the General tab to enter information about the product. In addition to providing basic information about the product, this section determines the product's visibility in the catalog and search.

The selection, order, and grouping of the fields is determined by the attribute set that was used to create the product. As a result, the product attributes might differ from what is shown in the example.

		O Citals New Addiso
Name*	Isla Desibody Hantbag	Income weigh
Description *	Padded walter. Contrast sticking Fail over fag with Faster closure. Cossided; strap $T\times T = 0.77$	STORE VEV
Dhart Description *	<mark>We know to 2 conce</mark> From holese function with the decideds (me with long	Tapoli nev
	We have to a table	
SKU*	973 100712 1000F	JOLOBALJ
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General Information

Button Descriptions

FIELD	DESCRIPTION
Create New Attribute	Gives you the ability to create a new attribute while working in product edit mode. Although you can save the new attribute, it is not automatically included in the attribute set that is associated with the current product.
WYSIWYG Editor	Opens the editor so you can format the description fields with HTML. The frontend properties of the description attributes must set to allow HTML.

FIELD	SCOPE	DESCRIPTION
Name	Store View	(Required) The name of the product you want to appear in catalog. The name is also used to auto-generate the URL Key.
Description	Store View	(Required) The main product description that appears on the product page.
		The text should be plain ASCII text. HTML tags can be used to format the description if permitted by the attribute properties.
		Do not paste text directly from a word processor, because the text might include print control codes that will not render correctly. To strip out any control codes, save the file as a .txt file before copying and pasting the text into the product description.
Short Description	Store View	(Required) Depending on the theme, the Short Description might appear on catalog pages. Because of its length, it is often used for RSS feeds.
SKU	Global	(Required) The Stock Keeping Unit is a unique identifier for each individual product or service provided.
Weight	Global	(Required) The weight of the product is a decimal value used for shipping calculations, and refers to the standard measurement system used by shipping carriers in your locale. In the United States, weight is measured in pounds and ounces, whereas countries on the metric system measure weight in grams and kilograms.
Set Product as New from Date	Website	Sets the beginning date for the range of time the product is featured in the "New Product" block on the Home page. The date can be typed directly into the box, or selected from the calendar.
Set Product as New to Date	Website	Sets the ending date for the range of time the product is featured in the "New Product" block on the Home page.

Field Descriptions

FIELD	SCOPE	DESCRIPTION	
Status	Website		us indicates when the product d for sale in your store. abled / Disabled.
URL Key	Store View		ne address of the product. It is RL of the store, and appears a browser.
		with hyphens instea	d be all lowercase characters, d of spaces. Magento initially earch engine friendly" URL, t name.
		because use of the s	x .html in the URL Key, suffix is controlled by your To learn more, see , SEO
Visibility	Store View	· · ·	es the level of visibility the out the store. Options include:
		Not Visible Individually	The product may be associated with a one-to- many product, but is not listed in the catalog.
		Catalog	The product appears in the catalog listing, but is not included in Search results.
		Search	The product appears in search results, but is not listed in the catalog.
		Catalog, Search	The product is listed in the catalog and search results.
Country of Manufacture	Website	Select the manufact new options to the lis Label / Options.	urer of the product. To add st, see Manage

Product Meta Data

Meta data is your first level of contact with potential customers who are searching for a product. Your title and description are selling tools that will either help to motivate a visitor to click your link or not. It is wise to use a descriptive title and a description that includes relevant words that a potential customer might search.

The information is read by search engines that index your site. Although Google no longer places a value on meta keywords, other search engines continue to use the information. It's a good practice to incorporate high-value keywords in your product titles and related content.



Meta Information

Field Descrip	tions

FIELD	SCOPE	DESCRIPTION
Meta Title	Store View	The title appears in the title bar and tab of your browser, and is also used as the title on a search engine results page (SERP).
Meta Keywords	Store View	Relevant keywords for the product. Consider using keywords that customers might use to find the product.
Meta Description	Store View	A few sentences that describe the product. Although not visible to the customer, some search engines include the meta description on the search results page.

Recurring Profile

Recurring Profiles are most often used for subscriptions or products with installment payment plans. When such a product is purchased from your store, the customer is redirected to a third-party payment system. The customer enters into a recurring payment agreement to authorize the payment system to charge the customer account according to the recurring profile settings.

When a customer purchases a product with recurring payments, the profile parameters specified from Magento are transferred to the payment system. Magento supports recurring profiles for items paid with PayPal Express Checkout.

For example, to set up a product with monthly subscription payments, the following parameters are specified in the recurring profile of the product. The customer is charged by the payment system once a month, for a year.

Billing Period Unit:	Month
Billing Frequency:	1
Maximum Billing Cycles:	12

You can also set up a trial period where the customer pays a special, introductory price for a period of time. Wen the trial ends, the customer is charged the regular amount.

Creating a recurring profile for a product does not create additional sales orders.

In the third-party payment system, a recurring profile is an accounting record that captures payments on a regular basis and according to the payment schedule defined in the recurring profile. A recurring profile submits the information about the frequency of a payment being initiated to the payment system.

The Recurring Profile tab appears by default for simple and virtual products. However you can configure it to become available for other product types by changing the Apply To property of the recurring_profile attribute. To learn more about recurring profiles, see: Working with Recurring Profiles in the knowledge base.

To set up a recurring profile:

- 1. On the Admin menu, select **Catalog > Manage Products**. Find the product in the list, and click to open it in edit mode.
- 2. In the panel on the left, select **Recurring Profile**.
- 3. Set Enable Recurring Profile to "Yes." The section expands to include additional options.

Recurring Profile		Create New Attribute
Enable Recurring Profile	No Froducts with recurring profile participate in catalog as nominal items.	[GLOBAL]

Recurring Profile

4. In the Schedule section, do the following:

Customer Can Define Start Date	No
Schedule Description	
	A Short description of the recurring payment. By default equals to the product name.
Maximum Payment Failures	
	The number of scheduled payments that can fail before the profile is automatically suspended.
Auto Bill on Next Cycle	No
	 Automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).

- a. To let the customer determine the starting date for the payments, set **Customer Can Define Start Date** to "Yes."
- **b.** In the **Schedule Description** field, enter a brief description of the recurring payment. The description is used as the name of the recurring payment on the Review Information page.
- **c.** In the **Maximum Payment Failures** filed, enter the number of times payment can fail before the recurring profile is suspended.
- **d.** To automatically initiate a payment transaction at the end of the next billing cycle, set **Auto Bill on Next Cycle** to "Yes."
- **5**. In the Billing section, do the following:

Billing Period Unit*	Please Select T
	 Unit for billing during the subscription period.
Billing Frequency *	
	Number of billing periods that make up one billing cycle.
Maximum Billing Cycles	
	The number of billing cycles for payment period.

Billing

- a. Set **Billing Period Unit** to the period of time that defines the billing cycle.
- **b.** Set **Billing Frequency** to how often a payment transaction is initiated during the billing cycle.
- **c.** In the **Maximum Billing Cycles** field, enter the maximum number of payments allowed for the recurring profile. If left blank, the customer will continue to be charged until the recurring profile is canceled.
- 6. In the Trial Period section, do the following:

Trial Period	
Trial Billing Period Unit	Not Selected 🔻
Trial Billing Frequency	
Maximum Trial Billing Cycles	
Trial Billing Amount	

Trial Period

- **a.** Set **Trial Billing Period Unit** to the period of time that defines the billing cycle during the trial period.
- **b.** Set **Trial Billing Period Frequency** to how often a payment transaction is initiated during the trial billing cycle.
- **c.** In the **Trial Billing Period Cycles** field, enter the maximum number of payments allowed during the trial period.
- d. In the **Trial Billing Amount** field, enter the product price during the trial period.

The trial billing period parameters are optional, but if specified, make sure that all fields are complete. Otherwise, the payment system will not authorize the payment.

7. In the Initial Fees section, do the following:

Initial Fees	
Initial Fee	
	Initial non-recurring payment amount due immediately
	upon profile creation.
Allow Initial Fee Failure	No
	Whether to suspend the payment profile if the initial fee
	fails or add it to the outstanding balance.

Initial Fees

- **a.** In the **Initial Fees** field, enter the amount that the customer is charged at the time of purchase. The initial fee is paid only once during the life of a subscription.
- b. If you want to cancel the recurring if the initial payment fails, set Allow Initial Fee
 Failure to "Yes." If set to "No," the initial fee is added to the customer's outstanding amount and is charged by the payment system as soon as the customer account has a sufficient amount.
- **8.** When complete, click the **Save** button.

Field Descriptions

FIELD	SCOPE	DESCRIP	TION
SCHEDULE			
Customer Can Define Start Date	Global		s if the customer can set the starting payments. Options include:
		Yes	Displays the Recurring Profile Start Date as an option on the product page.
		No	The customer cannot set the start date.
Schedule Description	Global	A brief description of the recurring payment. The description appears as the name of the recurring payment on the review information page of the payment system. If left empty, the name of the selected product appears as the name of the recurring profile.	
Maximum Payment Failures	Global	Determines the number of failed scheduled payments before the recurring profile is automatically be suspended.	

FIELD	SCOPE	DESCRIPTION
Auto Bill on Next Cycle	Global	Determines if the payment system automatically initiates a payment transaction after the regular billing cycle.
		In the event of a number of payment failures and the customer has an outstanding amount, the customer is charged in the next billing cycle. Options: Yes / No
BILLING		
Billing Period Unit	Global	Determines the period of time included in a subscription billing cycle, and how frequently a payment transaction is initiated. Options include:
		Day
		Week Two Weeks
		Month
		Year
Billing Frequency	Global	Determines how often within the billing period a payment transaction is initiated for the recurring profile.
Maximum Billing Cycles	Global	Limits the number of payments that can be made during a billing cycle. If you do not specify the maximum of billing cycles, the recurring profile remains permanently active and the customer is charged by the payment system until the recurring profile is suspended or canceled.
TRIAL PERIOD		
Trial Billing Period Unit	Global	Determines the period of time included in a trial subscription billing cycle, and how frequently a payment transaction is initiated. Options include: Day Week
		Two Weeks
		Month
		Year

FIELD	SCOPE	DESCRIP	TION
Trial Billing Frequency	Global	Determines how often during the billing period a payment transaction is initiated for the recurring profile.	
Maximum Trial Billing Cycles	Global	Limits the number of recurring payments that can be made during a trial billing cycle.	
Trial Billing Amount	Global	The price of	the product during the trial period.
Initial Fees	Global		
Initial Fee	Global	The amount the customer is charged at the time of purchase. The initial fee is paid only once during the life of a subscription.	
Allow Initial Fee Failure	Global	Determines if the payment profile is suspended if the initial fee payment fails. In case the field is set to No, Options include:	
		Yes	The payment profile is suspended if the initial fee fails.
		No	The initial fee is added to the customer's outstanding amount and is charged by the payment system as soon as the customer account has the sufficient amount.

Design

The Design page gives you the ability to apply a different theme to the product page, and make updates to the XML code that controls the page layout.

)esign		O Create New Attribute
Custom Design	Please Select 🔻	[STORE VIEW]
Active From		[STORE VIEW]
Active To		[STORE VIEW]
Custom Layout Update		[STORE VIEW]
		A
Page Layout	No layout updates	[STORE VIEW]
Display Product Options In	Block after Info Column	[STORE VIEW]

Product 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:	
		No layout updates	This option is preselected by default and does not apply layout changes.

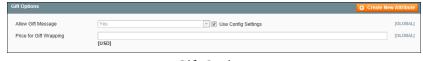
FIELD	SCOPE	DESCRIPTION	
		Empty	This option lets you define your own layout, such as a 4-column page. Requires an understanding of XML.
		1 column	Applies the 1-column layout.
		2 columns with left bar	Applies the 2 column layout.
		2 columns with right bar	Applies the 2-columns with right bar layout.
		3 columns	Applies the 3 column layout.
Display product options in	Store View	Options include: Proc after Info Column	duct Info Column / Block

Gift Options

Gift Options determine if customers have the option to add a gift message and to gift wrap the product during checkout. To configure gift options for the store, see: Gift Options Configuration.

To set up gift options for a product:

- 1. On the Admin menu, select **Catalog > Manage Products**. Then, click to open the product in edit mode.
- **2.** In the panel on the left, select **Gift Options**. Then, do the following:



Gift Options

- **a.** The Allow Gift Message reflects the default configuration. To override the setting, clear the **Use Config Settings** checkbox. Then, change the value as needed.
- **b.** To charge for gift wrapping, enter the amount in the **Price for Gift Wrapping** field, as a decimal, without the currency symbol.
- **3.** When complete, click the **Save** button.

Websites

If your Magento installation has multiple websites, stores, or views, you can set the scope of a configuration setting, product, category, or attribute to apply to a specific website, store, or store view. To learn more, see: Websites, Stores & Views.

Items that you don't want to show in the catalog or se	ch results should have status 'Disabled' in the desired store.	
I Main Website		
Madison Island		
English		
French		
German		
Store2		
Store2		
≣ Website2		
Website3		

Product Information: Websites

To assign a product to a store view:

- 1. In the Product Information panel on the left, select **Websites**.
- 2. Select the checkbox for each store view where the product is offered for sale.
- **3.** When complete, click the **Save** button.

Categories

Every product in your catalog must be assigned to at least one category. Before you can add products to your catalog, you must first establish its basic category structure. A product cannot be saved until after it has been assigned to at least one category.

Product Categories	
Default Category (1)	
🖶 🔁 🗍 Women (51)	
👜 🦢 🗐 Men (70)	
Accessories (58)	
e 🔜 🗐 Eyewear (3)	
(7) Jewelry (7)	
Ci 🖂 Shoes (38)	
😂 🗐 Bags & Luggage (10)	
a 📴 🗔 Home & Decor (40)	
😕 🧫 🛄 Sale (9)	
🔄 🖂 VIP (6)	
- Card (3)	
e 📴 🛄 Private Sales Root (295)	
🛞 📴 🛄 Women (112)	
🏨 🧫 🛄 Men (101)	
@ (🔤 🛄 Shoes (73)	
El Staging (0)	

Product Categories

To set up the product categories:

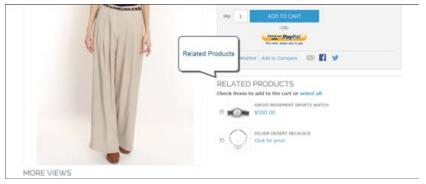
- 1. In the Product Information panel on the left, select **Categories**.
- **2.** In the category tree, select the checkbox of each category to which you want to associate the product. Click the plus [+] icon to show any available subcategories.

A single product can be assigned to more than one category.

3. When complete, click the **Save** button.

Related Products

Related products are meant to be purchased in addition to the item the customer is viewing. Simply click the checkbox of a product to place it in the shopping cart. 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 column.



Related Products

To set up related products:

- 1. In the Product Information panel on the left, click **Related Products**.
- **2.** Click the **Reset Filter** button in the upper-right to list all the available products, or use the search filters at the top of each column to find specific products.
- **3.** In the list, select the checkbox in the first column of any product you want to feature as a related product.

3	1D +	Name	Туре	Attrib. Set Name	Status	Visibility	SKU	Price	Position
res *			•	•	•	•		From:	From:
								To:	TO:
8	554	Swiss Movement Sports Watch	Simple Product	Jewelry	Enabled	Catalog. Search	acj005	\$500.00	0 0
8	553	Silver Desert Necidace	Simple Product	Jewelry	Enabled	Catalog. Search	acj000	\$210.00	0 0
8	545	Pearl Strand Necklace	Configurable Product	Jewelry	Enabled	Catalog, Search	acj001c	\$250.00	0 0

Select Related Products

4. When complete, click the **Save** button.

Up-sells

Up-sell products are items that your customer might prefer instead of the product currently viewed. 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)."



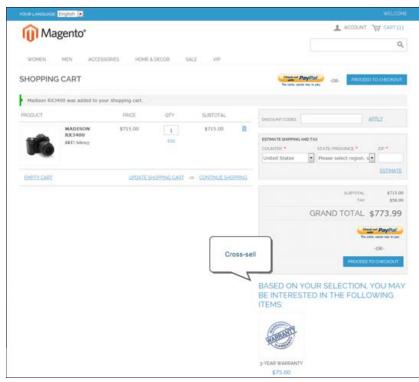
Up-Sell on Product Page

To select up-sell products:

- 1. In the Product Information panel, select **Up-sells**.
- 2. Click the **Reset Filter** button in the upper-right to list all the available products, or use the search filters at the top of each column to find specific products.
- **3.** In the list, select the checkbox in the first column of any product you want to feature as an up-sell.
- **4.** When complete, click the **Save** button.

Cross-sells

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



Cross-sell Offered During Checkout

To set up cross-sell products:

- **1.** In the Product Information panel on the left, click **Cross-sells**.
- **2.** Click the **Reset Filter** button to list all the available products, or use the filters at the top of each column to find specific products.
- 3. Select the checkbox in the first column of any product you want to feature as a cross-sell.

	-		View 20 .		and a factor of			arrest.	and the second second
age -	ID 1	of 1 pages (the law i	per page Total 1 rec	Status	Visibility	SKU	Price	Position
10	10 +	name	Туря	Attrib. Set itamie	Stature	Commenty	SKU	Price	Position
Yes •				•	•			From:	From:
								To:	To:
8	338	Jackie O Round Sunglasses	Simple Product	Accessories	Enabled	Catalog. Search	ace001	\$295.00	0 0

Cross-Sell Product

4. When complete, click the **Save** button.

Custom Options

Custom options are an easy way to offer a selection of product variations that do not rely on attributes. The limitations are that you cannot track inventory based on any variation, and that a product with custom options cannot be used with a configurable, grouped, or bundle product. Custom options are a good solution if your inventory needs are simple.

ovio luncinas: English 💌		WILCOM
🕕 Magento*	1 AC	CUNT THE CHAT(I)
		٩
	V/P	
CHE / ACCESSORES / JEWELINY / BLUEHONEDHA BHADILITS	BLUE HORIZONS BRACELETS IN STOCK Add a pop of color with these handmade bangles from Indi	\$155.0
	RELATED PRODUCTS	
	Check items to add to the cart or select all SWING TIME EARCINGS \$75.00	
	BLACK NOLITA CAMI \$150.00	
Company of the other of the other	GEOMETRIC CANCLE HOLDERS \$90-00 \$45,00	
Custom Options		
Freich * 12 Kerzet Celid Piele: + \$100.00		* Required Fields
ay 1 ADD TO CART		

Custom Options on Product Page

To create custom options:

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. In the list, open the product record in edit mode.
- **3.** In the panel on the left, select **Custom Options**.
- 4. In the upper-right corner, click the Add New Option button. Then, do the following:

tom Options			🔂 Add New Opti
Title *	Input Type *	Is Required Sort Order	Delete Option
	Please select	▼ Yes ▼	
	- Please select -		
	Text		
	Field		
	Area		
	File		
	File		
	Select		
	Drop-down Radio Buttons		
	Checkbox		
	Multiple Select		
	Date		
	Date		
	Date & Time		
	Time		

Custom Options

- **a.** In the **Title** field, enter a name for the property.
- **b.** Set the **Input Type** you want to use for data entry.
- **c.** Set **Is Required** to "Yes" if the option must be selected before the product can be purchased.
- **d.** In the **Sort Order** field, enter a number to indicate the order of this item in the list of options. Enter the number 1 to display this option first.
- 5. Click the Add New Row button. Then, complete the following:

Title *	Input Type *		Is Required Sort Order		Delete Option
Finish	Drop-down	•	Yes 🔻		
Title *	Price	Price Type	SKU	Sort Order	
Silver		Fixed •	SLVR		8
Gold		Fixed •	GOLD		8

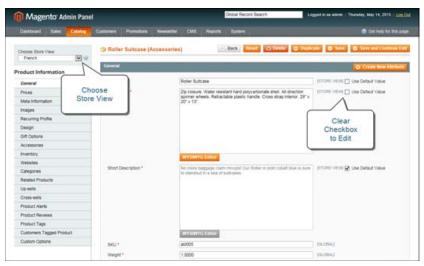
Add New Row

- 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 to the product SKU.
- e. In the **Sort Order** field, enter a number to indicate the order of this item in the list of options. Enter the number 1 to display this option first.
- **6.** When complete, click the **Save** button.

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.



Change the Product Scope to Store View

Step 1: Translate Product Fields

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. In the list, find the product and click **Edit** to open.
- **3.** In the upper-left corner set **Choose Store View** to the view where the changes you make will be visible. When prompted to confirm, click **OK**.

Only fields with a scope of [STORE VIEW] can be edited separately for each view or language.

- **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.
- **5**. When complete, click the **Save** button.

Step 2: Translate Field Labels

- 1. On the Admin menu, select **Catalog > Attributes**.
- 2. In the list, find the attribute and click to open in edit mode.
- **3.** In the panel on the left, select **Manage Label / Options**.
- 4. In the Manage Titles section, enter the translated label text for each store view.

Magento [®] Admin Pane	l,		0	Robal Record Search	Logged in an admit Thursday, May 14, 2015 Link Ob
Dashboard Sales Catalog	Cutomens Pron	otora Nevslete	CVIS	Reports System	🕐 Get help for this page
Attribute Information	F Edit Produ	ct Attribute "Der	scription"	· Back	Reset Ø Save Attribute Ø Save and Continue Edit
Properties					
Manage Label / Options	G Hann da sat	specify an option valu	e for a specific i	store view then the default (Admin	d value will be used.
manage capes - Options	A a bis on unit				
manage Laver - Options	Manage Titles (tim, Color, etc.)			
manage cacher options		kons (Color (etc.)) English	French	German	

Enter Translated Labels

5. When complete, click the **Save Attribute** button.

Notes	



CHAPTER 15:

Managing stock creates opportunities for customer engagement by displaying stock availability messages in your store, and giving your customers the opportunity to receive product alerts. Even if your store doesn't have a large inventory of products, your customers can benefit from the way you manage your inventory.

Inventory settings can be made for the catalog as a whole, and fine tuned for each individual product. In addition to controlling stock levels, the inventory settings determine how backorders and returned items are managed. If your needs are simple, you might choose not to manage inventory at all. However, inventory management is more than just keeping track of how many products you have on hand.

Topics in this chapter:

- Inventory Setup
- Managing Stock
- Stock Availability Messages
- Out of Stock Threshold
- Product Alerts

Inventory Setup

The Product Stock Items configuration determines the default product inventory settings. 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 menu, select **System > Configuration**.
- **2.** In the panel on the left, under Catalog, select **Inventory**.
- 3. Click to expand the **Product Stock Options** section.
- 4. Enter the default settings for each item, as described in the following field descriptions.
- **5.** When complete, click the **Save Config** button.

nduci Stock Options				
Note that these settings are applica	ble to cart line items, not the whole cart.			
Manage Stock	Yes	•	[OLOBAL]	
Backorders	No Backorders	•	Recover1	
daximum Qty Allowed in Shopping Cart	10000		FR.0BALI	
Only for item's Status to Become Out of Stock	0		lorosvi3	
linimum Oly Allowed in	Customer Group Minimum Oty	e	[GL08AL]	
Shopping Cart	ALL GROUPS •	O Delete O Add Mission	um City	
lobity for Quantity Below	1		(OLOBAL)	
inable Qty increments	Yes	•	(oroser)	
2ty increments	1		(GLOBAL)	
lutomatically Return Credit Memo tem to Stock	No	٠	(GLOBAL)	

Product Stock Options

Field Descriptions

FIELD	SCOPE	DESCRIP	TION
Manage Stock	Global Determines if you use full inventory of manage the items in your catalog. O include:		5
		Yes	Activates full inventory control to keep track of the number of items currently in stock.
		No	Does not keep track of the number of items currently in stock.

FIELD	SCOPE	DESCRIPTION	
Backorders	Global	A backorder does no status of the order. F captured immediatel regardless of whethe	ar store manages backorders. t change the processing Funds are still authorized or y when the order is placed, er the product is in stock. ecomes available, it will be clude:
		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.
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of a product that can be purchased in a single order by customer group. By default, the maximum quantity is set to 10,000.	
Qty for Item's Status to Become Out of Stock	Global	Determines the stoc considered to be out	k level at which a product is of stock.
Minimum Qty Allowed in Shopping Cart	Global	Determines the minimum amount of an iten is available for purchase according to custo group. By default, the minimum quantity is 1. Click the Add Minimum Qty button to enter different value for a specific customer group	
Notify for Quantity Below	Global		k level at which notification ntory has fallen below the
Enable Qty Increments	Global	Determines if items increments. Options	can be sold in quantity include: Yes / No

FIELD	SCOPE	DESCRIPTION
Qty Increments	Global	Establishes the number of products that make up a quantity increment.
Automatically Return Credit Memo Item to Stock	Global	Determines if items included on credit memos are automatically returned to inventory. Options include: Yes / No

Managing Stock

Each product in your catalog has both a short and long version of the Inventory options, depending on whether you need to manage inventory for the product. The long form appears only when Manage Stock is set to "Yes." The initial values reflect the default Product Stock Option configuration.

Inventory	
Manage Stock	No (GLOBAL]
Minimum Qty Allowed in Shopping Cart	1 [GLOBAL] ☑ Use Config Settings
Maximum Qty Allowed in Shopping Cart	10000 [GLOBAL] ✔ Use Config Settings
Enable Qty Increments	No ▼ [GLOBAL]

Inventory (Short Form)

To complete the inventory settings:

- **1.** In the Product Information panel, select **Inventory**. To complete the required settings, do the following:
 - a. Clear the checkbox below the Manage Stock field. Then, set Manage Stock to "Yes."
 - **b.** In the **Qty** field, type the number of units you currently have in stock.
 - c. Set Stock Availability to "In Stock."
- 2. Complete the remaining settings as needed, as described in the following field descriptions.
- **3.** When complete, click the **Save** button.

Inventory		
Manage Stock	Yes ▼ ✓ Use Config Settings	[GLOBAL]
Qty*	0	[GLOBAL]
Qty for Item's Status to Become Out of Stock	0	[GLOBAL]
Out of Stock	 Use Config Settings 	
Minimum Qty Allowed in	1	[GLOBAL]
Shopping Cart	🕑 Use Config Settings	
Maximum Qty Allowed in	10000	[GLOBAL]
Shopping Cart	🕑 Use Config Settings	
Qty Uses Decimals	No	[GLOBAL]
Can be Divided into Multiple	No	[GLOBAL]
Boxes for Shipping		
Backorders	No Backorders 🔻	[GLOBAL]
	Use Config Settings	
Notify for Quantity Below	1	[GLOBAL]
	 Use Config Settings 	
Enable Qty Increments	No	[GLOBAL]
	Use Config Settings	
Stock Availability	Out of Stock	[GLOBAL]

Inventory (Long Form)

Field Descriptions

FIELD	SCOPE	DESCRIPTION		
Manage Stock	Global	Determines if you use full inventory control to manage the items in your catalog. Options include:		
		Yes	Activates full inventory control to keep track of the number of items currently in stock. (To change the setting, clear the Use Config Settings checkbox and select "Yes.")	
		No	Does not keep track of the number of items currently in stock. (This is the default setting.)	
Qty	Global	(Required) The quantity of the item 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 amount of this item that is available for purchase. By default, the minimum quantity is set to 1.		

FIELD	SCOPE	DESCRIF	NOIT	
Maximum Qty Allowed in Shopping Cart	Global	Determines the maximum number of this item that can be purchased in a single order. By default, the maximum quantity is set to 10,000.		
Qty Uses Decimals	Global	Determines if customers can use a decimal value rather than a whole number when entering the quantity ordered. Options include:		
		Yes	decimals, rathe numbers, whic	to be entered as er than whole h is suitable for by weight, volume or
		No	Quantity value as whole numb	s must be entered bers.
Can be divided into Multiple Boxes for Shipping	Global	Determines if parts of the product can shipped separately. Options include: Yes / No		
Backorders	Global	Determines how your store manages backorders. A backorder does 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. When the product becomes available, it will be shipped. Options include:		
		No Backorders Does not accept backorders when product is out of stock		
		Allow Qty	Below 0	Accepts backorders when the quantity falls below zero.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION		
		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 include: Yes / No		
Qty Increments	Global	Establishes the number of products that make up a quantity increment.		
Stock Availability	Global	Determines the current availability of the product. Options include:		
		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

The Stock Options settings determine if items are removed from stock when an order is placed, and returned to stock if an order is canceled. The Stock Options determine if out-of-stock products are included in the catalog, and control the display of the "In Stock," "Out of Stock," and "Only x left" messages.

YOUR LANSUAGE English 🕑 YOUR CURRENCY US Dollar - USD	WELCONE, CLARE CONDRAL
Magento"	ACCOUNT THE CART
.0.	Q
WOMEN MEN ACCESSORIES HOME & DECOR SALE	VD
HOME / HOME & DECOR / DECORATIVE ACCENTS / HERALD GLASS VISE	
	HERALD GLASS VASE \$110.00
Only 1 Left	IN STOCK Sign up for price alert
	Segn up for price and The uniquely shaped Herand Glass Vase packs easily and adds instant impact.
	Only 1 left
	Ofy: 1 ADD TO CART
	Add to Washist Add to Compare 📾 🖪 🎔
	And to Wishinst ; And to Compare that by

Only 1 Left

To configure stock options:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **Inventory**.
- 3. Click to expand the **Stock Options** section. Then, do the following:
 - a. To return items to stock if an order is cancelled, **Set Items Status to be in Stock When Order in Cancelled** to "Yes."
 - **b.** To adjust the quantity on hand when an order is placed, set **Decrease Stock When Order is Placed** to "Yes."
 - **c.** Set **Display Out of Stock Products** to "Yes" to continue to display products in the catalog that are no longer in stock.

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

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

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

e. To display an "In Stock" or "Out of Stock" message on the product page, set **Display** products availability in stock in the frontend to "Yes."

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

Stock Options

4. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Set Items' Status to be in Stock When Order is Cancelled	Store View	Returns item to stock when order is cancelled. Options include: Yes / No
Decrease Stock When Order is Placed	Global	Decreases the quantity in stock when the order is placed. Options include: Yes / No
Display Out of Stock Products	Global	Displays products that are out of stock. If product alerts are enabled, customers can sign up to be notified when the product becomes available. Options include: Yes / No
Only X left Threshold	Website	Establishes the threshold for the "Only x left" message. For example, if set to 3, the message appears when there are 3 or fewer of an item in stock. The message does not appear if the value is set to 0.
Display products availability in stock in the frontend	Store View	Displays an "In Stock or "Out of Stock" message on the product page. Options include: Yes / No

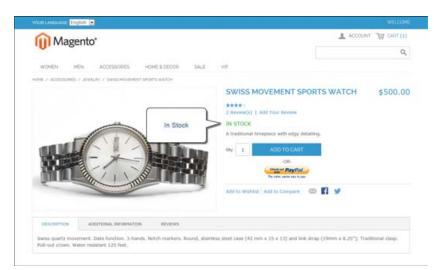
Field Descriptions

Stock Availability

You can define an inventory level that becomes the threshold to determine when an item needs to be reordered. The out of stock threshold 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.

Your catalog can be configured to display the availability of each item as "In Stock" or "Out of Stock" on the product page. 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 search results lists.



"In Stock" Message on Product Page

Process Overview:

Step 1: Configure the Inventory Stock Options

Step 2: Set the Product to Manage Stock

Step 3: Set the "Out of Stock" Threshold

Step 1: Configure the Inventory Stock Options

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the Configuration panel on the left, under Catalog, select **Inventory**.
- 3. Click to expand the **Stock Options** section. Then, do the following:

Stock Options		٢
Set Items' Status to be In Stock When Order is Cancelled	Yes 🔻	[STORE VIEW]
Decrease Stock When Order is Placed	Yes 🔻	[GLOBAL]
Display Out of Stock Products	No A Products will still be shown by direct product URLs.	[GLOBAL]
Only X left Threshold	0	[WEBSITE]
Display products availability in stock in the frontend	Yes V	[STORE VIEW]

Stock Options

- **a.** To configure how "out of stock" products are handled in the category and search results lists, set **Display Out of Stock Products** to one of the following:
 - Yes Includes "out of stock" products on catalog pages.
 - No Omits "out of stock" products from catalog pages.
- **b.** To configure the stock availability message on the product page, set **Display products availability in stock in the frontend** to one of the following:
 - Yes Displays an availability message indicating the product stock status.
 - No Does not display an availability message.
- 4. Click the **Save Config** button to save the setting.

Step 2: Set the Product to Manage Stock

- 1. On the Admin menu, select **Catalog > Manage Products**.
- **2.** In the list, click to open the product. Then in the Product Information panel on the left, select **Inventory**.
- **3.** If necessary, clear the **Use Config Settings** checkbox, and set **Manage Stock** to "Yes." Then, complete the inventory settings as needed.
- 4. Make sure that Stock Availability is set to "In Stock."
- 5. Click the **Save** button to save the product settings.

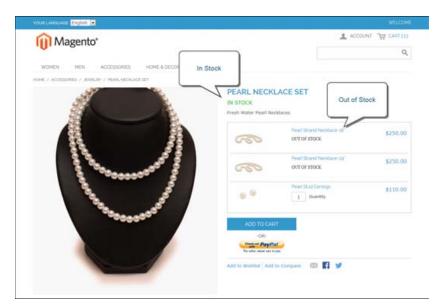
Step 3: Set the "Out of Stock" Threshold

- **1.** On the Inventory tab, set the **Qty for Item's Status to Become Out of Stock** to a value above zero.
- **2.** To set the quantity of the product that is allowed in the cart, set the following fields to the appropriate values for your product, store, and strategy:
 - Minimum Quantity Allowed in Shopping Cart
 - Maximum Quantity Allowed in Shopping Cart
- **3.** To be notified when stock drops below the threshold, clear the **Use Config Settings** checkbox. Then, set **Notify for Quantity Below** to a number to establish the threshold. The default the value is 1.

If you need time to restock your inventory, you can use this value to indicate when it is time to replenish.

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 Both Messages

Product Page

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

	ISLAND				
WOMEN	MEN	ACCESSORES	HOME & DECOR	TALE	Alte
HOME / ACCESSO	HES / BAOS & LUDGAGE / B	SLA CROSSBODY HANDBAG			
			ROSSBODY HANDBA	G	\$329.04 Click for prio What's the
	0	A Form follow	es function with this decidedly chic mi	1	UT OF STOC
		*=	8	Out of St	ock

"Out of Stock" Message

Example 1: Show Availability Message

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

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

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

WILCOME LANCEAGE			L HY ACCOUNT +	A MACHILIT	CHEORDA
MADISON IS	LAND				
WOMEN	++E7+	ACCESSORES	HONE & DECOR	54LE	19
HOME / ACCESSIONES /	EAGS & LUGGAGE				
BAGS & LUG	GAGE			S.co.	De lo fill Perd
SHOP BY	SORT BY POSITION .	•	RESULTS FER FACE	RECENT	VVEWED
PIECE 5100.00 - 5100.00 (0 5200.00 - 5299.99 (0 5500.00 - 5599.99 (0 5500.00 (we stave ()					5]
COLON Black (S) Black (S) Hony (S)	A	M 1	53	нара	
GENDER Fernaler (2) Hale-(3) Male of Permile (4)				- (-
MATERIAL Loster 15 Cher (3	ELA CROSSBODY HAND		of Stock		AMERA BAG
BAG & LUGGAGE TYPE Brieflase (D Bueress (D) Herdbags (D)	6389-00 Cach for pr		\$150.00	1	L
Listen Big to Listepation (9)			-		1000 1.00

"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

Out of Stock Threshold

You can define an inventory level that becomes the threshold to determine when an item needs to be reordered. The out of stock threshold is set to a number above zero.

To set the out of stock threshold:

- 1. In the Product Information panel, select **Inventory**.
- 2. Set the Qty for Item's Status to Become Out of Stock to a value above zero.

To change the quantity allowed in cart:

This option is helpful for products in high demand. If you want to capture a larger number of new customers rather than selling high volumes to high-quantity buyers, you can set a maximum quantity to prevent a high-quantity buyer from taking out your entire inventory.

- **1.** In the Product Information panel, select **Inventory**.
- **2.** Change the **Minimum** and **Maximum Quantity Allowed in Shopping Cart** fields to appropriate values for your product, store, and strategy.

To be notified when stock drops below threshold:

- 1. In the Product Information panel, select **Inventory**.
- 2. Clear the **Use Config Settings** checkbox, and set **Notify for Quantity Below** to indicate the level when you want to be notified. By default, the value is set to 1.

Product Alerts

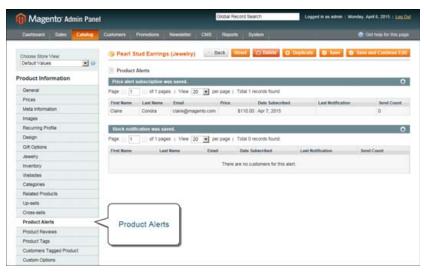
You can enable your customers to subscribe to two types of customer alerts by email: price change alerts and in-stock alerts. For each alert type, choose whether to enable users to subscribe to it, and select the email template to use. Also, select a sender display name, which applies to both alert types.

-		YOUR CURRENCY. US	Dollar - USD					
U I IVIA	agento	5						Q
WOMEN	MEN	ACCESSORIES	HOME & DECOR	SALE	VIP			
one / Access		ELRY / PEARL NEOKLAS	2.927	OUT Sign t	OF STOCK	alert tified when this produ	Alert Me:	
	10000 B		and a start of the	0	000	Peerl Strand Neckl	ice-til	\$250.00
	ADD DO DO		and the second s	4	007	Pearl Strand Neckl	ace-24	\$250.00
			7		0 0	Pearl Stud Earrings		\$110.00
		_		Add t	wishlist	Add to Compare 🛛 🕅	s 🖪 🏏	
		_						

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.



List of Price Alert Subscriptions

To set up product alerts:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **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		•
Product Alerts		•
Allow Alert When Product Price Changes	No	[STORE VIEW]
Price Alert Email Template	Product price alert (Default Template from Loca 🔻	[STORE VIEW]
Allow Alert When Product Comes Back in Stock	No	[WEBSITE]
Stock Alert Email Template	Product stock alert (Default Template from Loc: 🔻	[STORE VIEW]
Alert Email Sender	General Contact 🔹	[STORE VIEW]

Product Alerts

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Allow Alerts When Product Price Changes	Store View	Determines if email alerts are available for product price changes. Options include: Yes / No
Price Alert Email Template	Store View	Identifies the template that is used for product price change email alerts.Default template: Product price alert
Allow Alert When Product Comes Back in Stock	Website	Determines if customers can choose to receive an alert when the product comes back in stock. Options include: Yes / No
Stock Alert Email Template	Store View	Identifies the template that is used for stock alert email notifications. Default template: Product stock alert
Alert Email Sender	Store View	Determines the store contact that appears as the sender of the product alert email message.

Product Alert Run Settings

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

To set up product alerts:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Product Alerts Run Settings** section. Then, do the following:

- **a.** To determine how often product alerts are sent, set **Frequency** to one of the following:
 - Day
 - Week
 - Month
- **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, click the **Save Config** button.

Product Alerts Run Settings		٩
Frequency	Daily	[GLOBAL]
Start Time	00 • : 00 • : 00 •	[GLOBAL]
Error Email Recipient		[GLOBAL]
Error Email Sender	General Contact	[GLOBAL]
Error Email Template	Product alerts Cron error (Default Template fro: •	[GLOBAL]

Product Alert Run Settings

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Frequency	Global	Choose how often product alerts are sent out: Daily, Weekly, or Monthly.
Start Time	Global	Choose what time of day the product alert process starts. This time should be after any price or inventory updates are performed.
Error Email Recipient	Global	Identify the email address of the person (normally a store administrator) who should receive an email notification when there is an error in the product alert process.
Error Email Sender	Global	Select the role that the email will be "from."
Error Email Template	Global	Select the email template to use for product alert error notifications

Managing Stock for Configurable Products

By default, Manage Stock is turned off for a configurable product, because the inventory is managed through each associated product. However, at times it may be necessary to apply inventory settings to a configurable product as a whole, such as to set quantity increments and change the stock availability.

To enable quantity increments:

- 1. On the Inventory tab of the configurable product, clear the **Use Config Settings** checkbox, and set **Manage Stock** to "Yes." The Enable Qty Increments field appears.
- 2. To sell the product in quantity increments, do the following:
 - **a.** Below the Enable Qty Increments field, clear the **Use Config Settings** checkbox. Then, set **Enable Qty Increments** to "Yes."
 - **b.** In the **Qty Increments** field, enter the number of products that you want to sell together as a single batch.

To set product as "Out of Stock:"

- 1. On the Inventory tab of the configurable product, clear the **Use Config Settings** checkbox, and set **Manage Stock** to "Yes." The Stock Availability field appears.
- 2. To temporarily remove the product from sale, set Stock Availability to "Out of Stock."
- 3. When you are ready to offer the product for sale, set **Stock Availability** to "In Stock."

Notes	



CHAPTER 16: Product Pricing

Magento Community Edition supports a number of pricing options that you can use for promotions, and to meet minimum advertised price requirements.

Topics in this chapter:

- Prices
- Special Price
- Tier Price
- Package Price
- Minimum Advertised Price
- Product Group Price

Prices

The Prices tab is used to establish the pricing structure of the product. Options include special and tier pricing, and manufacturer's suggested retail price.

rices						Create New Attribute
Price *	295.00 [USD]					IGLOBALI
Group Price	Website	Customer Group	Price	O Add Gro	Action op Price	
Special Price	[U SD]					[GLOBAL]
Special Price From Date						(WEBSITE)
Special Price To Date	[E				(WEBSITE)
Tier Price	Website	Customer Group	Qty	Price	Action Add Tior	
Apply MAP	Use config					(WEBSITE)
Display Actual Price	Use config		۲			IMERENEI
Manufacturer's Suggested Retail Price	ប្រទព្វ					JOLOBALI
Tax Class *	Taxable Goods					[WEBSITE]

Prices

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Price	Global	The retail price of the product.
Group Price	Global	Sets up promotional prices for specific customer groups within the selected website.
Special Price	Website	To offer a Special Price, enter a discounted price and complete the date range fields to establish when the promotion goes into effect. When available, the retail price is crossed out and the special price appears below in a large, bold font.
Special Price From Date	Website	Sets the beginning date for the range of time the Special Price is offered.
Special Price To Date	Website	Sets the ending date for the range of time the Special Price is offered.
Tier Price	Website	Tier pricing is used to offer a quantity discount. The discount can be applied to specific customer groups within the selected website.

FIELD	SCOPE	DESCRIPTION	
Apply MAP	Website		s the actual product price from ons include: Yes / No / Use
Display Actual Price	Website	Determines when the actual product price	he customer can see the e. Options include:
		In Cart	Displays the actual product price in the shopping cart.
		Before Order Confirmation	Displays the actual product price only at the end of the checkout process, just before the order is confirmed.
		On Gesture	Displays the actual product price
		Use Config	Displays the actual price according to the configuration setting.
Manufacturer's Suggested Retail Price	Global	The retail price as s (MSRP).	suggested by the manufacturer
Tax Class		The tax class asso	ciated with the product.

Field Descriptions (cont.)

Special Price

To offer a Special Price, enter a discounted price and complete the date range fields to establish when the promotion goes into effect. On both the catalog list and product pages, the regular price is crossed out, and the Special Price appears in bold red.

Magento*	L ACCOUNT THE CART
WOMEN MEN ACCESSORIES HOME & DECOR SALE	VIP Special Price
ICHE / SALE / ACCESSORES / JADIE DRUND SUNGLASSES	JACKIE O ROUND SUNGLASSES
\sim	***** \$295.00 \$225.00
	IN STOCK
	These distinct, feminine frames balance a classic lackie-O styling with a modern look.
	GIY 1 ADD TO CART
	CR-
	The party space way to pay
	Add to Wishest Add to Compare 🛛 🔀 🔰
DESCRIPTION ADDITIONAL INFORMATION REVENS	Add to Wolfest Add to Compare - 🔯 🛐 😏

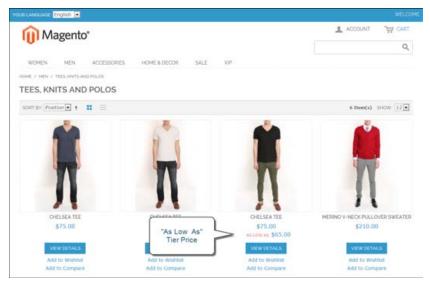
Special Pricing

To display a special price:

- 1. In the Product Information panel on the left, select **Prices**.
- 2. Enter the amount of the **Special Price**.
- **3.** Complete the **Special Price From Date** and **Special Price To Date** to define the period of time that the special price is in effect. You can pick the dates from the **Calendar** is to the right of each field.
- 4. Click the **Save** button to save your changes.
- 5. When prompted to update the cache and indexes, follow the instructions at the top of the page.

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.
- On the product page, the calculated quantity discount has the message:

Buy 2 for \$___. each and save _%

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, then the customer gets 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 quantity 5 tier and that discounted price (of 10) applies instead.

U M	agento	D "					CCOUNT THE CART
WOMEN	MEN	ACCESSORIES	HOME & DECOR	SALE	VP	Tier Price	
HE / HEN /	TEES, ANITS AV	ND POLOS / CHELSEAT	11		l		
					CHELSEA TEE	1	\$75.0
					IN STOCK	Buy 2 for	65.00 such and save 24%
	1				Minimalist style and maxim	ium comfort meet in this lig	htweight tee.
					Color *		* Required Fields
	1				Choose an Option		
					Sex *		
					Choose an Option		
					monogram +\$20.00		
			é		Record number of character Test Custom Options Piease Select	. 109	
						-OR- -OR- - PayBal - second so bate Compare 💿 🗗 😏	

Tier Price on Product Page

To display a tier price:

- 1. In the Product Information panel on the left, select **Prices**.
- 2. In the Tier Price section, click the Add Tier button. Then, do the following:

Magento Admin Panel			Gishal Record Sea	rch.	Lapped in an admin	n j Thursday, May 1, 2014	The Magazita District Free 1 Los
Dationer Sales Crime	Noble Calterers Promitiens	Newsletter CMS	Reports Ter				
Q Lowel Message: Revender Charge Map	ents's default phone numbers and calculty bet	we allo lauroit		11	Tits have 5 printed, 5 mil	pe, 19 mmer and 113 million	unned message(s) So to pottled
Choose Stare Vew Default Values	S Chelses Tee (Clothing)			(),flats, 10	er O'teen	O Therefore O Terr	C Save and Continue 1
Product Information	Pites						O Create New Arrents
General Prices	Price+	75.00 (USO)					isteed
Mela Information	Oroup Price	moute	Customer Group	Price			<u> </u>
Images					And Care	12 12 12 12 12	
Decign	Special Price				-	Tier Price	(IN-ROSAL)
Gift Options		lineoli					a parat
Cutherg	Special Price From Date		18		_		(MEMORY)
investory	Special Price To Dete		10				permit
Webutes	Tier Price	Makala	Contornet Group	an	Price Action		
Calegories		All Websites (USD)	ALL GROUPS	 3 and abyon 	45.00		
Related Products					O AM THE		
Uponts				-	_		
Cross-sets	Apply MAP	No					(MACHINE)
Product Reviews	Deplay Actual Price	Use config					2463010
Product Tags	Manufacturer's Suggested Ratel						(inclusion)
Customers Tagged Product	Ptice	(USD)					
Custum Options	Tax Classi *	Tavable Goods		•			(MERCITE
Associated Products							

Tier Pricing

- a. Select the **Website** to which the tier pricing applies.
- **b.** Select the **Customer Group** for whom the tier pricing is available.

To apply a tier to multiple groups, but not all groups, create multiple tiers, each with the same Qty and Price information and select a different customer group for each.

- c. In the **Qty** field, enter the quantity that must be ordered to receive the discount.
- d. In the **Price** field, enter the adjusted price of the item.
- **3.** When complete, click the **Save** button.
- **4.** When you are prompted to update the cache and indexes, follow the instructions in the message at the top of the workspace.

Package Price

Unlike a unit price, a package price refers to multiple items of the same product that are packaged together and sold as a single unit. A six-pack of soft drinks is an example of package pricing.

How to sell multiple products as a package:

- 1. On the Admin menu, select **Catalog > Manage Products**.
- **2.** In the list, click to select the product you want to sell as a package.
- 3. In the Product Information panel on the left, select **Inventory**. Then, do the following:
 - a. Set **Qty for Item's Status to Become Out of Stock** to the lowest inventory threshold for this item. (If necessary, clear the **Use Config Settings** checkbox.)

The number should be a multiple of the number of items in the package. For example, for a six-pack, the threshold might be 6, 12, 18, and so on.

- b. Set Enable Qty Increments to "Yes."
- c. Set **Qty Increments** to the number of units included in the package. For example, 6.
- **4.** When complete, click the **Save Config** button.

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.

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FRICE	ELECTRONICS		CHELSEA TEE
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\$100.00 - \$199.99 (4)			CHELSEA TEE
\$400.00 - \$499.99 (2)			n
\$700.00 and above (1)			SLIM FIT DOBBY OXFORD SHIRT
COLOR			JACKIE O ROUND
Black (9)	MADISON LX2200 MADISON RX3400	MP3 PLAYER WITH MADISON BGB DIGITAL	SUNGLASSES
Charcoal (2)	Click for price	AUDIO MEDIA PLAYER	COMPARE PRODUCTS
Green (2)	MADISON FX1400	\$150.00	You have no items to compare.
ELECTRONIC TYPE			
Accessories (#)	Be able easier easy to pay	for Price ADD TO CART	
Camera (3)	-OR-	Add to Wishist	
Media Players (3)	ADD TO CART	Add to Compare	
Speakers + Earphones (3)	and a second	\cap	
	Our price is lower than the manufactu		
	advertised price." As a result, we can price in catalog or the product page.	oc show you the	
	You have no obligation to purchase the	e product once you	
	know the price. You can simply remov cart.	e the item from your 5 LARGE CAMERA BAG	
	\$40.00 \$125.00	\$120.00	
	***** ****		
	OUT OF STOCK ADD TO CART	ADD TO CART ADD TO CART.	
	Add to Westilist Add to Westilist	Add to Wishlist Add to Wishlist	
	Add to Compare Add to Compare	Add to Compare Add to Compare	

"Click for Price" Gesture with Popup

MAP Logic

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

- 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.

PRODUCT TYPE	DESCRIPTION
Simple, Virtual	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Custom option prices appear normally.
Grouped	The prices of associated simple products do not automatically appear on catalog list and product pages, but are included only according to the Display Actual Price setting.
Configurable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. Option prices appear normally.
Bundle with fixed price	The actual price does not automatically appear on catalog pages, but is included only according to the Display Actual Price setting. The prices of bundle items appear normally.
	MAP is not available for bundle products with dynamic pricing.
Downloadable	The actual price does not automatically appear on catalog list and product pages, but is included only according to the Display Actual Price setting. The price associated with each download link appears normally.

Using MAP with Product Types

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.

MAP Setup

MAP can be configured at both the global and product levels. 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. Your store's MAP settings can be applied to all products in your catalog or configured for only specific products.

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 globally, product-level MAP settings become available. For a product you can choose to apply MAP, specify the MSRP, and define how the actual price is displayed. Product-level MAP settings override the global MAP settings.

nable MAP	Yes	Internal
Apply MAP (Default Value)	No	[WEBSITE]
	 Warning: Applying MAP by default will hide all produce prices on the frontend. 	
Display Adual Price	On Gesture	[WEBSITE]
Default Popup Text Message	Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot above you the price in catalog or the product page. +cr /-+cr /- You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.	ISTORE VIEW]
Default "What's This" Text Message	Our price is lower than the manufacturer's "minimum advertised price." As a result, we cannot show you the price in catalog or the product page. <hr -="" <hr=""/> You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.	. Interference

Minimum Advertised Price Configuration

To configure MAP globally:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** If applicable, in the upper-right corner, set **Current Configuration Scope** to the website where the configuration applies.
- **3.** In the panel on the left, under Sales, select **Sales**. Then, click to expand the **Minimum Advertised Price** section, and do the following:
- 4. To activate MAP, set Enable MAP to "Yes."
 - a. Set Apply MAP (Default Value) to one of the following:

- To apply MAP to certain products, select "No."
- To apply MAP by default to all products and hide all prices throughout the site, select "Yes."
- **b.** To determine when and where you want your actual price to be visible to the customer, set **Display Actual Price** to one of the following:
 - In Cart
 - Before Order Confirmation
 - On Gesture (on click)
- 5. When complete, click the **Save Config** button.

To configure MAP for a specific product:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the Configuration panel on the left, under Sales, click to expand the **Minimum Advertised Price** section. Then, do the following:
 - a. Set Enable MAP to "Yes."
 - b. Set Apply MAP (Default Value) to "No."
 - c. Complete the remaining settings as needed. Then, click the Save Config button.
- **3.** Select **Catalog > Manage Products**, and open the product record.
- 4. In the Product Information panel on the left, select**Prices**. Then, do the following:
 - a. Enter your **Price** that is lower than the manufacturer's minimum advertised price.
 - **b.** Set **Apply MAP** to "Yes."
 - c. Set Display Actual Price according to your preference.
 - d. Enter the Manufacturer's Suggested Retail Price.
- **5.** When complete, click the **Save** button.

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	เบรอง				
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Special Price					GLOBAL
	[US0]	(
Special Price From Date			MAP		INERGITE
Special Price To Date	<u> </u>	2	Settings		[WEBSITE
Tier Price	Website	Customer Grou		Action Add Tier	
Apply MAP	Yes		,		(websm
Display Actual Price	On Gesture		•		[WEBSITE
Manufacturer's Suggested Retail	329.00				ISLOBAL
Price	[USD]				
Tax Class *	Taxable Goods		•		(WERSITE

Minimum Advertised Price Configuration

Field Descriptions				
FIELD	SCOPE	DESCRI	IPTION	
Enable MAP	Website	Activates Minimum Advertised Price for your store. Options include: Yes / No		
Apply MAP	Website		IAP by default to all products in the tions include:	
		Yes	Initially hides all prices in the store, and displays them according to the Display Actual Price setting.	
		No	Does not apply MAP to all products, by default. If MAP is enabled, it can still be applied to products individually.	
Display Actual Price	Website		es where the actual price of a product is the customer.Options include:	
		In Cart	Displays the actual product price in the shopping cart.	

Field Descriptions

FIELD	SCOPE	DESCRIPTION	
		Before Order Confirmation	Displays the actual product price at the end of the checkout process, just before the order is confirmed.
		On Gesture	Displays the actual product price in a popup when the customer clicks the "Click for price" or "What's this?" link.
Default Popup Text Message	Store View		ssage that appears when the he "Click for price" link from a duct view page.
Default "What's This" Text Message	Store View	The pop-up text message that appears when the customer clicks the "What's this?" link from the product view page.	
Manufacturer's Suggested Retail Price	Global	The retail price as s (MSRP).	suggested by the manufacturer

Field Descriptions (cont.)

Product Group Price

Product Group Price enables you to set promotional prices for different customer groups at the product level. Group price can be used with the following product types:

- Simple
- Configurable
- Virtual
- Bundle
- Downloadable

For Bundle products, the group price is specified as a discount percentage. If bundle items have their own group prices set for the same customer group, then the discount specified for the entire Bundle applies to the group prices.

For Grouped products, the Group Price is not applied, even if the product type is selected in the Apply To field of the group_price attribute. In this case, the Group Price field does not appear in the Prices section of Product Information.

Product Group Price Setup

The display of group prices in the store follows the general logic used for Magento pricing. If, in addition to the regular price, a product has promotional price(s), the lowest price appears in the storefront. If a product custom option has price set as a percentage, then the lowest promotional price is used as base for the calculation. The same logic applies when the associated products (the options) of a configurable product have prices set as a percentage.

Examples: Promotional Prices in Storefront

The following table illustrates how the minimum promotional price logic is implemented. The table provides several examples, but it is not an exhaustive list of possible combinations.

ADMIN PRICE	STOREFRONT PRICE
Price = \$4	For customers from the tier price group(s): \$4
Special Price = \$5	As low as: \$3
Tier Price = \$3	For customers from other groups: \$4
Price = \$5	For all customers:
Special Price = \$3	Regular Price: \$5
Tier Price = \$4	Special Price: \$3
Price = \$5	For customers from the catalog price rule group:
Special Price = \$3	Regular Price: \$5
Tier Price = \$4	Special Price: \$2
Price after a catalog price	For customers from other groups:
rule applied = \$2	Regular Price: \$5
	Special Price: \$3
Price = \$5	For customers from the price group:
Special Price = \$4	Regular Price: \$5
Group Price = \$3	Special Price: \$3
	For customers from other groups:
	Regular Price: \$5
	Special Price: \$4

Promotional Pricing

Important! When a group price is set for a product, the catalog price rules for the corresponding customer groups are applied to the group price, not to the regular price.

To set up a group price for a product:

- 1. On the Admin menu, select **Catalog > Manage Products**. Then in the list, click to open the product in edit mode.
- 2. In the panel on the left, click **Prices**. Then, do the following:
 - a. In the Group Price field, click the Add Group Price button.
 - **b.** Select the target **Customer Group** and enter the product **Price** for the group. The Website column defines the scope of the Group Price field.
- **3.** When complete, click the **Save** button.

Group Price Attribute

The list of product types for which group price can be specified is defined in the group_price attribute properties. The product types that can be used with the attribute are configured in the Apply To property.

Regular Price

The value of the price system product attribute, which by default, corresponds to the Price specified on the Prices tab in Product Information.

Promotional Price

A product price that is defined by any of the following system product attributes: special_price, group_price, or tier_price; or the resulting price after a catalog
price rule is applied.



CHAPTER 17: Product Images

Using images of consistent quality, size, and proportion gives your product catalog a professional look with commercial appeal. If you have a large catalog with several images per product, you can easily have hundreds, if not thousands of product images to manage. Before you get started, it's a good idea to establish a naming convention for your image files, and organize them so you can find the originals if you ever need them.

The Images tab in the Product Information panel is used to upload and manage individual images for the current product. You can upload multiple images for each product, with different images for each website or store view. However, if you have a large quantity of images to manage, it is more efficient to import, rather than upload each one individually. To learn more, see: Importing Product Images.

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Product Images

Thumbnail Gallery

The thumbnail gallery on the product page can be used to display multiple images of the product. Although the position of the gallery varies by theme, it is usually just below the main image on the product page. Click each image to browse through the thumbnail gallery.

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Click to Zoom	\$295.0 Magnified
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Image Zoom

Light Boxes and Sliders

Some stores use third-party light boxes or sliders to replace the default product image display. You will find a variety of light box and slider extensions available in Magento Connect.

Image Zoom

Magento displays a magnified portion of the image on mouseover, provided that you have uploaded a larger image that can be used to zoom in for a closer look. 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 Size and Type

As a best practice, you should standardize the size of your images so they appear at the highest possible resolution. A single product image can be displayed in several different sizes throughout your catalog. In addition to the main image on the product page, there are smaller images and thumbnails.

Image types are used in different places in your catalog. If you have only one product image, you can use the same image for each type. If you do not assign an image to each type, a placeholder image is used to mark its place in the catalog.

To configure product images:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Product Image** section. Then, do the following:
 - **a.** In the **Base Image Width** field, enter the maximum width that the base image is to be rendered.
 - **b.** In the **Small Image Width** field, enter the maximum width that the small image is to be rendered.

oduct Image			
Base Image Width	1800	[STORE VIEW]	
	 Maximum width base product image will be scaled down to in pixels 		
Small Image Width	210	[STORE VIEW]	
	Maximum width small product image will be scaled		
	down to in pixels		

Product Image

4. When complete, click the **Save Config** button.

IMAGE TYPE	DESCRIPTION
Thumbnail	Thumbnail images appear in the thumbnail gallery, shopping cart, and in some blocks such as Related Items. Example size: 50 x 50 pixels
Small Image	The small image is used for the product images in listings on category and search results pages, and to display the product images needed for sections such as for Up-sells, Cross-sells, and the New Products List. Example size: 470 x 470 pixels
Base Image	The base image is the main image on the product detail page. Image zoom is activated if you upload an image that is larger image than the image container. Example sizes: 470 x 470 pixels (without Zoom) 1100 x 1100 pixels (with Zoom)
Media Image	(Optional) A media image you the ability to associate additional images with a product, that are other than a product image. For example, you might include the product logo, care instructions, or an image of the ingredients from a food label.
	If you add a media image attribute to the attribute set of a product, it is listed as an additional image type, along with Base, Small, and Thumbnail. You can set it to "Exclude" so it doesn't appear in the gallery.

Image Types

Adding Product Images

The Images tab is used to upload and manage images for a single product. You can upload multiple images for the product, and maintain different images for each website or store view. However, if you have many images to manage, you might prefer to import them, rather than upload product images individually.

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Custom Options										

Adding Product Images

To add product images:

- **1.** If the images are to be used for only a specific store view, set **Choose Store View** in the upper-left corner to identify the view where the images will be used.
- 2. In the panel on the left, click **Images**.
- **3.** Click the **Browse Files** button, and select the product images files you want to upload to your store.
- **4.** Click the **Upload Files** button to upload the selected images to your store. Then, for each image, do the following:
 - **a.** Enter a descriptive **Label** for the image. This text appears on mouseover and can improve indexing by search engines.
 - **b.** If using multiple images, enter a numeric value in the **Sort Order** field to determine the sequence in which they appear in the thumbnail gallery.
 - **c.** To prevent an image from being included in the thumbnail gallery, click the **Exclude** checkbox. For example, if the product has only one image, there's no reason to include it in the gallery.
 - d. To delete any image, select the **Remove** checkbox.
- 5. When complete, click the **Save and Continue Edit** button.

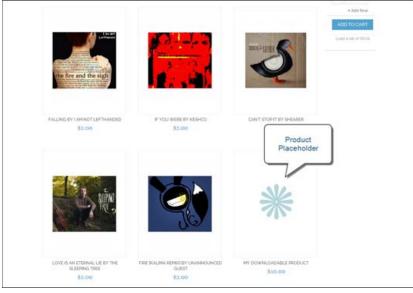
To add images to the gallery:

Follow the same process to add a new product image. For best results, gallery image files should be the same size and proportion as the main product image.

FIELD	SCOPE	DESCRIPTION
Image		On mouseover, a thumbnail of each uploaded image appears.
Label		The label is the descriptive "Alt" text that appears on mouseover. Including a label for each image improves indexing by search engines, and accessibility for people who use screen readers.
Sort Order		Determines the order in which images are displayed in the gallery.
Thumbnail	Store View	The Thumbnail image is used in the shopping cart and in some blocks, such as Related Items.
Small Image	Store View	The Small Image is used in product listings on the category and search results pages, and to display product images in additional sections such as Upsells, Cross-sells, and the New Products List.
Base Image	Store View	The Base Image is the main image on the product page, and is also used to produce the magnified area displayed during image zoom.
Media Image	Store View	(Optional) The Media Image appears only if an attribute of the Media Image type is included in the attribute set.
Exclude		Select the Exclude checkbox to prevent the image from being listed in the thumbnail gallery.
Remove		Select the Remove checkbox to delete the image. Selected images are deleted when the product record is saved.

Placeholders

Magento uses a temporary image as a placeholder until permanent product images are available. The initial placeholder image is the Magento logo, which you can replace with placeholder images of your own design.



Placeholder

To upload placeholder images:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the Configuration panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the Product Image Placeholders section. Then, do the following:
 - **a.** For each image type, click the **Choose File** button to navigate to, and upload the placeholder image you want to use for the **Base Image**, **Small Image**, and **Thumbnail** images. You can use the same image, or upload a different image for each type.
 - **b.** When complete, click the **Save Config** button.

Product Image Placeholders			۲
Base Image	Choose File placeholder.png	[STORE VIEW]	
Small Image	Choose File placeholder.png	[STORE VIEW]	
Thumbnail	Choose File placeholder.png	[STORE VIEW]	

Product Image Placeholders

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Base Image	Store View	Identifies the placeholder file chosen for the base image.
Small Image	Store View	Identifies the placeholder file chosen for the small image.
Thumbnail	Store View	Identifies the placeholder file chosen for the thumbnail.
BUTTON		
Choose File		Navigates to the file and uploads it as the placeholder image for the type.

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 place a watermark on each image to identify it as your property and make it a less attractive target. A watermark file can be either a .jpg (jpeg), .gif, or .png image.

Example: Watermark Positions

The watermark used in these examples is a .png file 470 x 470 pixels square, with a black logo and transparent background. The size and opacity were later adjusted to 100 x 100 pixels at 10% using the watermark configuration settings in the Admin panel. You can experiment with different watermark settings until you find the look you want.

Image: NoneTileTop LeftTop RightImage: NoneImage: None</tr

To place watermarks on product images:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under General, select **Design**.
- **3.** Click to 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 300
 - b. Enter the Watermark Opacity, as a percentage. For example: .40
 - c. Click the **Browse** button and select the Watermark image file to upload.
 - d. Set Watermark Position to your preference.
- 4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Base Image Watermark Default Size	Store View	The default size of the watermark for the Base Image. For example: 470 x 470
Base Image Watermark Opacity, Percent	Store View	The percentage of opacity applied to the watermark for the Base Image.
Base Image Watermark	Store View	The file with the watermark image to be uploaded for the Base Image. (The image file can be .jpg (jpeg), .gif, and .png.)
Base Image Watermark Position	Store View	The position of the watermark for the Base Image. Options include:
		Stretch
		Tile
		Top/Left
		Top/Right
		Bottom/Left
		Bottom/Right
Small Image	Store View	(Repeat the above for the Small Image.)
Thumbnail Image	Store View	(Repeat the above for the Thumbnail Image.)

Shopping Cart Thumbnails

The thumbnail images in the shopping cart give customers a quick overview of the items they are about to purchase. However, for products with multiple options, the standard product image may not match the actual item being purchased. If the customer purchased a pair of red shoes, ideally, the thumbnail in the shopping cart should show the product in the same color.

The thumbnail image for both grouped and configurable products can be set to display the image from either the "parent" product record or associated product. The setting applies to all grouped or configurable products in the current store view.

To configure shopping cart thumbnails:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, select Checkout.
- 3. Click to expand the **Shopping Cart** section, do the following:

Shopping Cart		٩
Quote Lifetime (days)	30	[WEBSITE]
After Adding a Product Redirect to Shopping Cart	Yes 🔻	[STORE VIEW]
Grouped Product Image	Product Thumbnail Itself	[STORE VIEW]
Configurable Product Image	Parent Product Thumbnail	[STORE VIEW]

Shopping Cart Configuration

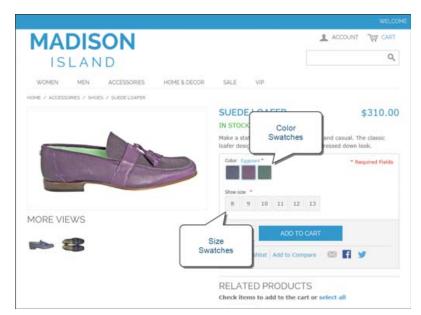
- a. Set **Grouped Product Image** to one of the following:
 - Product Thumbnail Itself
 - Parent Product Thumbnail
- b. Set Configurable Product Image to one of the following:
 - Product Thumbnail Itself
 - Parent Product Thumbnail
- 4. When complete, click the **Save Config** button.

Notes	



CHAPTER 18: Swatches

Swatches provide an alternate way to display the selection of options for configurable products. Rather than choosing an option from a drop-down list, customers can make their selection by clicking a swatch. Configurable swatches can be used on the product page, product list, and in layered navigation.



Color and Size Swatches on Product Page

In this chapter , you will learn how to use swatches to make the presentation of configurable products more appealing and informative. Topics include:

- How Swatches are Used
- Swatch Configuration
- Adding New Attribute Values
- Preparing Swatch Images
- Uploading Swatch Images
- Swatch Images Cache

Swatch Workflow

On the product page, swatches can be used to indicate the combinations of color and size that are currently available. Any option that is not available is crossed out. In the following example. the pistachio loafer is available only is size 8, so the rest of the sizes are crossed out. You can click each color swatch to see the available sizes, and click each size swatch to see the available colors. When a swatch is selected, the value appears in the input field, and the selected swatch is outlined as the current selection.



Unavailable Size Swatches Crossed Out

Swatches can be set up to display the corresponding product image when the swatch is clicked. For example, from the product list or product page, you can click the swatch to change the color of the main image.

Text-Based Swatches

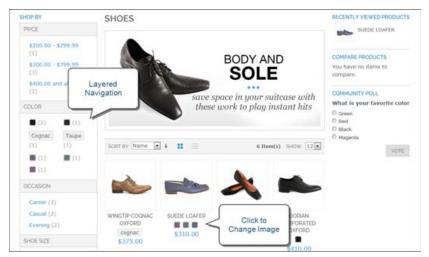
If there isn't an image available for a swatch, the attribute value appears as text. A textbased swatch is like a button with a text label, and behaves in the same way as a swatch with an image. In the following example, the color swatches are identified with a text label for the color name, just as the shoe size swatches have a text label for the size. If the size attribute values were "Small," "Medium," and "Large," rather than numbers, then that text would appear in the swatches instead.

Color: * Denim Eggplant Pistachio	* Required Fields
Shoe size: * 8 9 10 11 12 13	

Text-Based Color and Size Swatches

Swatches in Layered Navigation

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



Color Swatches in Layered Navigation and Product List

Swatch Configuration

This discussion begins with the understanding that you already have configurable products in your catalog. If you do not have working configurable products, you will need to set them up to continue.

Enabled	No	•	[STORE VIEW]	
Product Altributes to Show as	Accessories Size	(A)	[STORE VIEW]	
Swatches in Product Detail	Camera Megapixels			
	Color	1		
	Luggage Size			
	Manufacturer			
	Material			
	Necklace Length			
	Shoe size			
	Size			
	Style	-		
Product Attribute to Use for	Color	•	[STORE VIEW]	

General Settings

Process Overview:

Step 1: Complete the Configuration

Step 2: Test the Swatches In Your Store

Step 1: Complete the Configuration

- **1.** On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **Configurable Swatches**.
- 3. Click to expand the **General Settings** section. Then, do the following:
 - a. Set Enabled to "Yes."
 - **b.** In the list of **Products Attributes to Show as Swatches in Product Detail**, select each attribute whose values you want to appear as a swatch.

The list includes only the attributes that can be used to create configurable products. The attribute must be the Dropdown type, and Use to Create Configurable Product must be set to "Yes."

c. Select the Product Attribute to Use for Swatches in Product Listing.

Because of the limited space in the product listing, only one attribute can chosen to appear as a swatch in the product list.

- 4. To set the size of the swatches used on the product detail page, do the following:
 - a. Click to expand the Swatch Dimensions on Product Detail Page section.
 - **b.** Enter the **Width** and **Height** in pixels.

Just for reference, the swatches in the product page examples in this guide are 35 pixels square.

Swatch Dimensions on Product Detail Page				
Innermost dimensions, not including	border, in pixels			
Width	21	[STORE VIEW]		
Height	21	[STORE VIEW]		

Swatch Dimensions on Product Detail Page

- 5. To set the size of the swatches used in the product listing, do the following:
 - a. Click to expand the Swatch Dimensions in Product Listing section.
 - **b.** Enter the **Width** and **Height** in pixels.

Swatch Dimensions in Product Listing				
Innermost dimensions, not including	border, in pixels			
Width	15	[STORE VIEW]		
Height	15	[STORE VIEW]		

Swatch Dimensions in Product Listing

- 6. To set the size of the swatches used in layered navigation, do the following:
 - a. Click to expand the Swatch Dimensions in Layered Navigation section.
 - **b.** Enter the **Width** and **Height** in pixels.

Swatch Dimensions in Lay	rered Navigation		۲
Innermost dimensions, no	t including border, in pixels		
Width	15	[STORE VIEW]	
Height	15	[STORE VIEW]	

Swatch Dimensions in Layered Navigation

- 7. When complete, click the **Save Config** button.
- 8. If prompted that the cache needs to be refreshed, click the **Cache Management** link in the message at the top of the workspace. Select the checkbox of each invalid cache. Then, with the **Actions** control set to "Refresh," click the **Submit** button.

While you're in Cache Management, notice the Flush Swatch Images Cache button in the Additional Cache Management section at the bottom of the page. If you ever need to update or replace existing swatches, this is how you can clear all cached swatches.

Step 2: Test the Swatches In Your Store

- **1.** Verify that the swatches work correctly from your storefront. Even without any swatch images, the text-based swatches should appear in the store, and work correctly.
- **2.** If any drop-down options from the configurable product are missing from layered navigation, do the following:
 - Verify that the attribute frontend property, Use in Layered Navigation is set to "Yes."
 - Return to Cache Management and click the Flush Magento Cache button.

Field Descriptions

```
FIELD
```

SCOPE DESCRIPTION

GENERAL SETTINGS

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Enabled	Store View	Enables swatches for the configurable products in your store. By default, swatches are not enabled. Options include: Yes / No
Product Attributes to Show as Swatches in Product Detail	Store View	Lists all drop-down attributes that can currently be used with swatches. Select each attribute that you want to appear as a swatch on the product page. You can include more attributes in the list if they meet the requirements for configurable product options.
Product Attributes to Use for Swatches in Product Listing	Store View	Select one attribute to appear in the product listing.

SWATCH DIMENSIONS ON PRODUCT DETAIL PAGE

Width	Store View	The width, in pixels, of swatches that appear on the product page.
Height	Store View	The height, in pixels, of swatches that appear on the product page.

SWATCH DIMENSIONS IN PRODUCT LISTING

Width	Store View	The width, in pixels, of swatches that appear in the product list.
Height	Store View	The height, in pixels, of swatches that appear in the product list.

SWATCH DIMENSIONS IN LAYERED NAVIGATION

Width	Store View	The width, in pixels, of swatches that appear in layered navigation.
Height	Store View	The height, in pixels, of swatches that appear in layered navigation.

* Swatch dimensions do not include any border that might be added with CSS.

Adding Swatch Attribute Values

As you add products to your catalog, you will need to update the attribute values that correspond to each swatch. For example, if you sell clothing, you will need to add new colors to the color attribute to match the products. You can add as many values as you need to any attribute that is represented by a swatch. We use color as an example, but the process is the same for any attribute you might use.

Magento Admin Pa	nel			Global Recor	d Search	Logged in an admin (Sunday, November 9, 2014 LOLO
Destanded Sales Calaba	Customers I		sieller CMS	Neports System			
Q Latert Wessage: Familuler Charge	Wagerly's default phone	numbers and callouts \$	eture site laurich		Vou have 3 ortics	6, 6 mager, 19 million and 80 million	urread message(s). Go to with allow
Attribute Information	6 Edit Pro	duct Attribute "	Color	· flack	Intel O Deline	Altrender Ø Save Altrend	ie 🖉 Save and Continue Edit
Properties							
Manage Label / Options	🥥 if you do	not specify an option	value for a specifi	a store size then the de	fault (Admin) value i	all be used.	
			on stored the second				
	Manage Title	n (Size, Color, etc.)					
	Admin	English	French	German	Private Sales View		
	Color						
	Manage Opti	ions (values of your	eftributer)				
	Amm	English	French	German	Private Sales	Position is D	efault () Add Option
					vee		O Delete
New Color	E Bat	Back					O Dekter
	Blue	Elue					O Televier
							No. of Concession, Name of Street, or other
	Brown.	Drown				(e	C Determ

Add New Color Value

To add new colors:

- 1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
- 2. In the list, open the color attribute in edit mode.
- 3. In the panel on the left, click Manage Label / Options. Then, do the following:
 - a. In the list under Manage Options, click the Add Option button.
 - **b.** Under Admin, enter the names of the color as you want it to appear when working from the Admin. Then, enter the name of the color for each language supported, as you want it to appear in the storefront.
 - **c.** To determine the order in which the colors appear, enter a number in the position column.
 - d. Repeat this process for as many colors as you need.
- 4. Click the **Save Attribute** button.
- **5.** When prompted to refresh the cache, click the **Cache Management** link. Then, refresh any cache that is invalid.

Preparing Swatch Images

A swatch image can provide an accurate representation of color, and also illustrate a pattern or texture. There are two different methods you can use to create swatches for your products. You can use either method, or a combination of both.

- The default method is to create global swatches that represent a plain color, and upload them to Media Storage.
- You can also create custom swatches that illustrate a fabric or texture, and upload them to a specific product.

The size of the swatch that is set in the configuration, and the size of the uploaded image determine the level of detail that can be seen in the swatch. To show a pattern clearly, make sure that the image is large enough to capture the essence of the design. To show a fabric weave, texture, or grain of leather, capture the image at as high a resolution as possible, and crop the image as close to the display size of the swatch as possible. Any reduction in size makes the detail harder to see.



Capture Swatch from Product Image

To capture a swatch, you can open the main product image in a photo editor, and crop a section from the image. You can also use the eyedropper tool to pick up the exact color you need, and fill the swatch with the selected color. If you have the product available, you can take a photograph of the fabric with your camera. The swatches below were captured from the side of a shoe in the main product image.



Swatch Samples

Uploading Swatch Images

The swatches folder in Media Storage is the most common place where uploaded swatch images are stored. Swatch images that are uploaded to Media Storage are globally available and can be used by any product. The name of each uploaded image file must exactly match the attribute value that it represents. In this example, each file name is a color.



Swatches in Media Storage

Swatches can also be associated with a specific product, and uploaded directly to the product's thumbnail gallery. Swatches that are uploaded directly to a product do not appear in the gallery or in layered navigation. However, in some cases, there are advantages to using this method. It is also the recommended method for languages with a non-Latin character set, such as Arabic, Chinese, Cyrillic, or Japanese.

The system uses a "fall back" method to locate swatches. It looks first to see if there are any swatches associated with the product image. If it doesn't find a swatch, it then looks in Media Storage.

If you use a language other than English for attribute values, it is recommended that you upload swatch images to each configurable product, rather than to Media Storage. Files uploaded to Media Storage can only include the characters a-z and 0-9. Characters from non-Latin alphabets, such as Arabic, Chinese, Cyrillic, and Japanese are not recognized by the system. To learn more, see the developer documentation.

Method 1: Upload Swatches to Media Storage

Before uploading swatch images, make sure that the file names exactly match the corresponding attribute values. For example, if you upload a file named "gray.png," it will match the attribute value "Gray," but not "Grey."

All file names are converted to lowercase. In addition, any characters other than a-z and o-9 are replaced with a hyphen. Therefore, the swatch name "Royal Blue" becomes "royalblue."

If you have access to the server, swatch files can be uploaded to the following location:

[Magento install directory]/media/wysiwyg/swatches

- 1. On the Admin menu, select CMS > Pages > Manage Content.
- 2. In the list, click to open any page in edit mode.

The purpose of this step is to launch the editor. Media Storage can be accessed from any place the editor is used.

- 3. In the panel on the left, select **Content**.
- **4.** From the editor, click the **Insert Image** button. In the directory tree on the left, click the **swatches** folder, and do the following:
 - a. Click the **Browse** button, and locate the swatch image files that you want to upload.

You can upload individual images, or multiple images at the same time.

b. Click the **Upload Files** button to copy the file to Media Storage.

Newly uploaded images appear at the bottom of the list.



Uploading Multiple Swatches

- **5.** When you are done, click the **Close** button in the upper-left corner of the Media Storage window. Then, click the **Back** button to exit the editor.
- **6.** If prompted to refresh the cache, click the **Cache Management** link in the message at the top of the workspace, and refresh any cache that is invalid.
- **7.** Go to your storefront to verify that the swatches work correctly. The text-based swatches should now be replaced with the swatch images that you uploaded.
- **8.** If any drop-down options from the configurable product are missing from layered navigation, return to **Cache Management** and click the **Flush Magento Cache** button.

Method 2: Upload Swatches as Product Images

Use this method to associate swatch images with a specific product. Swatches uploaded with this method take precedence over those uploaded to Media Storage.

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. Find the product the configurable product in the list, and open the record in edit mode.
- **3.** If the image is intended for a specific store view, set **Choose Store View** to the store view where the images will be used.
- 4. In the panel on the left, click **Images**. Then, do the following:
 - a. Click the **Browse Files** button, and select the images files to upload to your store.
 - b. Click the Upload Files button to upload the selected images to your store.

g Image ty	pe and information need to be speci	fied for each stor	e view.				
Image	Label	Sort Order	Base Image [STORE VIEW]	Small Image [STORE VIEW]	Thumbnail [STORE VIEW]	Exclude	Remove
No image			0	0	0		
N							
Π	Charcoal Plaid-swatch	2	0	ø	0	8	6

Product Swatch with Label

c. Enter a **Label** for each swatch image uploaded, in the following format: color name, followed by a hyphen, and the word "swatch." This label identifies the image as a swatch that is associated with this specific variation of the product.

color-swatch

Do not select any of the remaining options. It is not necessary to select the Exclude checkbox, because by default, Swatch images do not appear in the thumbnail gallery.

- **5**. When complete, click the **Save** button.
- **6.** When prompted to clear the cache, click the **Cache Management** link in the message at the top of the workspace, and refresh any cache that is invalid.

Setting Up Dynamic Images

Dynamic images change when the corresponding swatch is clicked, and can be used on the product and product listing pages. The easiest way to understand this is to see how the products are set up.

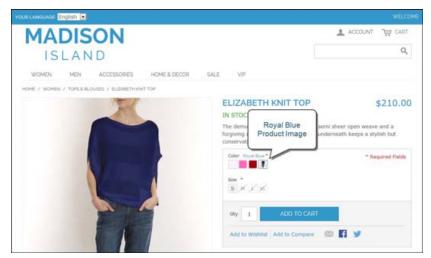


Swatches

With this technique, each associated product must have an image that depicts the variation, even if the products are different sizes of the same color. These are the images that appear dynamically when the swatch is clicked. As with all swatch images, the dynamic image does not appear in the thumbnail gallery.

Method 1: Upload Images to Configurable Product

When you view this product in the store and click a swatch, the corresponding product appears as the main product image. You can click any swatch to change the image. Also, notice in the example below that the fourth swatch is a miniature version of the Royal Blue product image. Because there isn't a Royal Blue swatch available, the fall-back method used the product image with the "Royal Blue" label.



Dynamic Product Image

1. Each associated simple product has a single product image that depicts the variation. Because these images are not swatches, they do not need the "-swatch" suffix. The product variations used in this example are labeled "Royal Blue," "Pink," and "Red."

Image	Label	Sort Order	Base Image [STORE VIEW]	Small Image [STORE VIEW]	Thumbnail [STORE VIEW]	Exclude	Remove
No image			O	0	0		
Ţ		1	•			.8	

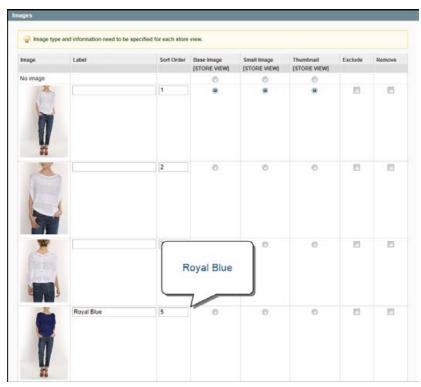
Image Uploaded to Associated Simple Product

2. The Color attribute for each variation is set to the correct color.

lothing		Create New Attribute
Color	Royal Blue	[GLOBAL]
Occasion	Casual	[GLOBAL]
Type *		[GLOBAL]
Sleeve Length	Royal Blue	[GLOBAL]
Fit		(STORE VIEW
Size		[GLOBAL]
Length		[GLOBAL]
Gender	Female	[GLOBAL]

Set Value of Color Attribute

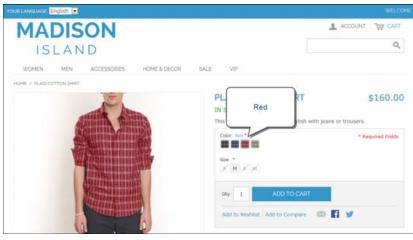
3. In addition to the standard product images, images for each product variation are also uploaded to the configurable product, and given labels that exactly match the corresponding color attribute values. No options are selected for the product variations. Although these images are not swatches, they will be used if no other swatch is available.



Images Uploaded to Configurable Product

Method 2: Upload Swatches to Configurable Product

This method features custom swatches that are uploaded to the configurable product. Each associated product has a product image that depicts the variation. When you click each swatch, the corresponding product image appears.



Dynamic Image

1. An image is uploaded to each associated product that shows the product variation.

Image	Label	Sort Order	Base Image [STORE VIEW]	Small Image [STORE VIEW]	Thumbnail [STORE VIEW]	Exclude	Remove
No image			0	0	0		
R		1	•	•	•	D	

Image Uploaded to Associated Simple Product

2. The Color attribute of the product variation is set to the correct color.

lothing			Create New Attribute
Color	Red		[GLOBAL]
Occasion	Cass	•	[GLOBAL]
Туре *			[GLOBAL]
Sleeve Length	Red	×	[GLOBAL]
Fit			[STORE VIEW
Size			[GLOBAL]
Length			(GLOBAL)
Gender	Male		[GLOBAL]

Set Value of Color Attribute

- **3.** In addition to the standard product images, a complete set of the swatch images is uploaded to the configurable product, and labeled as a swatch for each variation. In this example, the swatches are named:
 - Royal Blue-swatch
 - Charcoal-swatch
 - Red-swatch
 - Khaki-swatch

Image	Label	Sort Order	Base Image [STORE VIEW]	Small Image [STORE VIEW]	Thumbnail [STORE VIEW]	Exclude	Remove
No image			O	O	O		
		1	•	•	٠		
		2	0	0	0	5	8
		3	0	o	ð	8	5
	Royal Blue-swatch	4	0	Ø	0	15	8
	Charcoal-swatch	5	0	0	0	12	В
	Red-swatch	6	ø	0	0	B	5
	Khaki-swatch	7	0	0	0	12	

Images Uploaded to Configurable Product

Swatch Localization

If you use a language other than English for attribute values, it is recommended that you upload swatch images to each configurable product record, rather than upload the images to Media Storage. Swatch image file names that are uploaded to Media Storage are also used as CSS classes, and can only include the characters a-z, A-Z, and o-9. Characters from non-Latin alphabets, such as Arabic, Chinese, Cyrillic, and Japanese are not recognized by the system.

English as Primary Language

By default, the same swatch image can be used for all languages. The easiest way to localize a swatch is to simply translate the attribute label that appears in the store. However, if the translated labels include accented characters, see the next section.

The system uses a simple fallback strategy to locate a suitable swatch. The system looks first for a swatch image that is based on the current language. If no image is found, the system looks next for an attribute label that is associated with the configurable product option.

Using Manage Attribute / Labels, you can enter a translated label for each language supported. For example, the label for the color value "Red" would be entered as "Rot" for German. The following table shows the relationship between the attribute label, the product image label, and the image file name:

ATTRIBUTE LABEL	IMAGE LABEL IMAGE FILE NAME	
Red	Red-swatch	<pre>media/wysiwyg/swatches/red.png</pre>
Rot	Rot-swatch media/wysiwyg/swatches/ro	

Label Translation

Other Primary Languages

If possible, we recommend that you upload swatch images from the Magento Admin, which allows you to use any character in the image file name. However, if either of the following is true, you must upload swatches directly to the server:

- If you use a language other than English and the translated labels have Latin characters with diacritics (that is, accented characters)
- Your localized images have names that do not transliterate from UTF-8 to ASCII using PHP.

Swatch images are located on the server in the following directory: media/wysiwyg/swatches/. If you choose to upload images directly to the server, you must understand how attribute labels are converted to image names.

- 1. The label is transliterated from UTF-8 to ASCII.
 - **a.** If the label contains Latin characters with diacritics, many of the characters are transliterated to ASCII. For example, Ô is converted to ^O.
 - **b.** If the label cannot be transliterated into ASCII, no swatch images can be uploaded from media/wysiwyg/swatches/. Languages with characters that cannot be transliterated include Cyrillic, Chinese, Japanese, and Arabic.
 - **c.** If the language contains characters that cannot be transliterated to ASCII, do one of the following:
 - Upload all swatch images to each configurable product
 - In the Admin, change the attribute values to English as the primary language, and set up the swatch files in English.
- **2.** The label is converted to lowercase.
- 3. Any characters other than 0-9 and a-z are replaced with the dash character (-).

Conversion Examples

LABEL	CONVERTS TO
Königsblau media/wysiwyg/swatches/k-onigsblau.png	
Weiß	<pre>media/wysiwyg/swatches/weiss.png</pre>
красный (No transliteration is possible, and no image is uploaded.)	

Common Transliteration Values

CHARACTER	TRANSLITERATION	REPLACEMENT
French		
À	`A	-a
Â	^A	-a
Æ	AE	ae
Ä	"A	-a
Ç	С	C
É	'E	-e
È	Έ	-e
Ê	^E	-e

CHARACTER	TRANSLITERATION	REPLACEMENT	
Ë	"Ε	-e	
î	^	-i	
Ï	"	-i	
Ô	^O	-0	
Œ	OE	Oe	
Ö	"O	-0	
Ù	`U	-u	
Û	^U	-u	
Ü	"U	-u	
Ÿ	"Υ	-у	
German			
Ä	"A	-a	
Ö	"O	-0	
Ü	"U	-u	
ß	SS	SS	
Spanish			
Ñ	~N	-n	
Á	'Α	-a	
É	Έ	-e	
Í	Ч	-i	
Ó	'0	-0	
Ú	'U	-u	

Common Transliteration Values (cont.)

Clearing the Swatch Cache

Swatch images are resized and cached before they are used. Swatch images are stored on the server in the Magento installation directory, at the following location:

[Magento install directory]/media/catalog/swatches/

Whenever changes are made to existing swatch images, the swatch cache must be flushed before the changes can be seen in the store.

To flush the swatch cache:

- 1. On the Admin menu, select **System > Cache Management**.
- **2.** In the Additional Cache Management Section, click the **Flush Swatch Images Cache** button.

12		O Think Magnetic Cacher O T	keshi Casher Shura
(Unwint Value) I fams which		Actions Ret	esh • Submit
Description		Associated Tags	Statue
Systemiconfig.xml, local.xml) and modules configuration files(config.xml).		CONFIG	EMAGLED
Layout building instructions.		LAYOUT_GENERAL_CACHE_TAG	LANSIN
Page blocks HTML		BLOCK_HTML	ENNERS
Translation files.		TRANSLATE	EMMILLED
Collection data files.		COLLECTION_DATA	EMARITE
Entity types declaration cache.		EAV	TRADLED.
Web Services definition files (api xml).		CONFIG_API	INNELE
Web Services definition files (api2 xml)		CONFIG_API2	ENGLISH
	Devertation Dysterizzerfdy amit (acut amit and modules configuration the Layout building instructions. Layout building instructions. Depending the second second second second second provided and the second second second second Web Services definition files (api amit).	Devroyation Dysterriconfig.xml, local.xml; and modules configuration files/config.xml; Layout building instructions. Page blocks XTLL, Transardson files. Collection data files. Collection data files. Main Services detinition files (appl.xml).	Description Associated Tags System/config.xml, local.xml) and modules configuration tiles(config.xml). COVIPO Layout-building instructions. LaYout_COLERAL_CACHE_TAO page block XTML BLOCK_HTML, Translation tiles. TRAHIBLATE Coll-EXTOR tables. COLLECTION_DATA Exploy build XTML COLLECTION_DATA Coll-EXTOR tables. COLLECTION_DATA Coll-EXTOR contain cache EAV Veto Services definition tiles (api, xml). COLIFIG_API

Flush Swatch Images Cache

Notes	



Search & SEO

In this section...

Storefront Search Tools

Managing Search Terms

SEO Best Practices

Managing URL Rewrites



CHAPTER 19: Storefront Search Tools

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.

Magento Community Edition has a powerful search engine that you can use as is, or enhance to make even more effective. In this chapter, we will examine the search tools that are available to your customers while shopping in your store, including:

- Quick Search
- Advanced Search
- Search Results

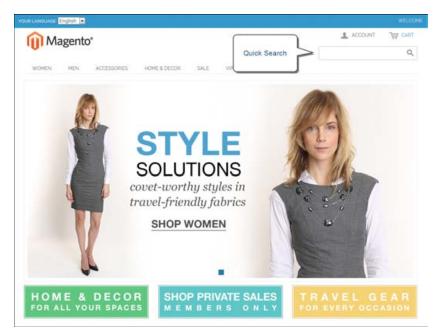
In addition, Magento's layered navigation gives your customers the ability to filter product options by price, manufacturer, or any other criteria to reduce the time it takes to make a purchase.

Quick Search

The Quick Search box in the upper-right corner 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.

To do a quick search:

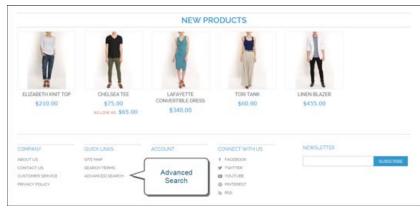
- **1.** Type the first few letters of what you are looking for into the search box.
- 2. Press either the **Enter** key or the button to the right of the search box to retrieve a list of matching products from the catalog.



Quick Search

Advanced Search

Advanced Search lets shoppers search through your catalog by entering values into a form. Because the form contains multiple fields, a single search can include several parameters. The result of the search is a list of the products that match the search criteria. A link to Advanced Search is in the footer of your store.



Advanced Search

Each field in the form corresponds to an attribute from your product catalog. You can determine which fields to include by setting the attribute frontend properties to "Include in Advanced Search." As a best practice, you should include only the fields that your customers are most likely to use to find a product, because too many can slow down the search.

To use advanced search:

- 1. In the footer of the store, click the **Advanced Search** link.
- **2.** In the Search Settings form, enter any value you want to match in as many fields as necessary. You can find records based on a full or partial match.
- 3. Click the **Search** button at the bottom to display the results.

Magazatat		ACCOUNT THE CART
Magento*		Q
WOMEN MEN ACCESSORIES	HOME & DECOR SALE VIP	
E / GATALOS ADVANCED SEARCH		
TALOG ADVANCED SEA	RCH	RECENTLY VIEWED PRODUCTS
SEARCH SETTINGS		CHELSEA THE CHELSEA THE CHELSEA THE CHELSEA THE CHELSEA THE SHITT COMPLET DOBBY OXPORTD SHITT COMPLET PRODUCTS You have no items to compare.
Sce 0 11. 7 9	å	
Gender		
Female Male Male or Female		
		SEARCH

Search Settings

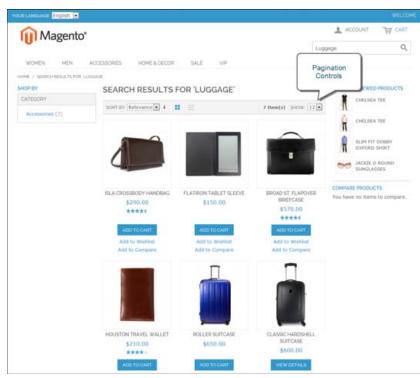
4. If you don't see what you are looking for in the search results, click **Modify your search** and try another combination of values.

				ACCOUNT THE CAR
Magento*				T
•				0
WOMEN MEN	ACCESSORES HOME & DE	CON SALE VIP		
OME / CRITILOG ROVINICED SEA	ICH / RESULTS			
ATALOG ADVANO	ED SEARCH			RECENTLY VIEWED PRODUCTS
item(s) were found using th	e following search criteria	\frown		CHELSEA THE
amer Pearl		Modify		n
on't see what you're looking	for? Modify your search	Your Search		T CHELSEA TEE
sont or Relevance 🔹 🕇	u = .		3 Item(s) SHOW 12.	•
				SLIM FTT DOBBY OXFORD
	0	D		IACKIE O ROUND SUNGLASS
0.00				COMPARE PRODUCTS
				You have no items to compare.
PEARL STRAND NECKLACE	PEARL STUD EARRINGS	PEARL NECKLACE SET		
\$250.00	\$110.00	thirting at \$110.00		
OUT OF STOCK	ADD TO CART	VIEW DETAILS		
Add to Wishlist	Add to Wishint	Add to Wahlist		
Add to Compare	Add to Compare	Add to Compare		

Search Results

Search Results

The Search Results list includes all products that match the search parameters entered through the Quick Search box or the Advanced Search form. Any page in the catalog that lists products 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.



Search Results with Pagination Controls

The results can be formatted as either a grid or list, and the records can be sorted by a selection of attributes. Controls can be used to sort the list and change the format from a list to a grid. Page links appear when there are more products than can fit on the page, and allow you to move from one page to the next. Depending on the layout, the left column of the page might also include layered navigation under the "Shop By" heading, with products listed by category and attribute.

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.

Page Controls

Popular Search Terms

The Search Terms link in the footer of your store displays the search terms that have been used by visitors to your store, and ranks them 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 included on the page will help improve your search engine ranking and the visibility of your store.

Magento*	ACCOUNT W CAN
101 Magento	9
WOMEN MEN ACCESSORIES HOME&DECOR SALE VIP	
POPULAR SEARCH TERMS	
5-Tear Visitianity	
24" Pearl Strand Necklace	
auda	
bag	
Black Initia Cent Predat	
Inackey party chebas	
dent	
tial	
stadeth	
Ellis Flat	
Paprano Cap - Hink Inter	
git card	
Goin Bown to the Bus Stap by Tillind	
grouped Luggege	
Support at	
Hadson Island VIP Hembership - 1 Year	
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modern	
nolita	
Pearl Necklack Set	
Pearl (Drand Necklass	
Films and Throw Set	
Postad Lever Top	
Partalis media Player	
shirt	
Bude Dess Shoe	
very set	
the second s	

Popular Search Terms

To configure Popular Search Terms:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the Configuration panel on the left, under Catalog, select **Catalog**. Then, do the following:
 - a. Click to expand the **Search Engine Optimizations** section.
 - b. Set Popular Search Terms to "Enable."
- 3. When complete, click the **Save Config** button.

Autogenerated Site Map	Enable	ETORE VIEW
Popular Search Terms	Enable	ISTORE VEVI
Product URL Suffix	Internal	(STORE VIEW)
	- Cache refresh needed	
Category URL Suffix	Internal	ISTORE VIEW)
	a Cache refresh needed.	
Use Categories Path for Product URLs	Yes	ITTORE VIEWS
Create Permanent Redirect for URLs if URL Key Changed	Yes	(STORE VIEW)
Page Title Separator	i.	(STORE VIEW)
Use Carionical Link Meta Tag For Categories	Yes	(STORE VIEW)
Use Canonical Link Meta Tag For Products	Yes	ISTORE VIEW)

Search Engine Optimizations

Catalog Search Configuration

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.

To configure catalog search:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the Configuration panel on the left, under Catalog, select **Catalog**. Then, click to expand the **Catalog Search** section.

Vinimal Query Length	1		ISTORE VIEW
Assimum Query Length	128		Istone view(
Maximum Query Words Count	10		ISTORE VIEW)
	A Applies for "Like" search type only.		
Search Type	Like		ISTORE VEW]
Apply Layered Navigation if	2000		ISTORE VIEW
Search Results are Less Than	 Enter "V" to enable layered navigation for any m of results. 	umber	

Catalog Search

- **3.** 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.
 - **c.** Set **Maximum Query Words Count** to the maximum number of words that can be submitted in a query.
- 4. Set **Search Type** to one of the following:
- 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 o.
- 6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION	
Minimal Query Length	Store View	The minimum numbe catalog search.	er of characters allowed in a
Maximum Query Length	Store View	The maximum numb catalog search.	er of characters allowed in a
Maximum Query Words Count	Store View	The maximum numb query.	er of words allowed in a
Search Type	Store View	Determines the type of search operation performed by the MySql engine. Options include	
		Like	Performs a search based on individual keywords.
		Fulltext	Performs a search based on the full text of each attribute and ranks each by relevance.
		Combine (Like and Fulltext)	This combination of Like and Fulltext matches by keyword, but takes into consideration its relevance.
Apply Layered Navigation if Search Results are Less Than	Store View	Sets the maximum number of search results the are displayed as a list. Any results over the number are shown as layered navigation. To apply layered navigation to all search results, enter 0.	
		Using layered navig	gation for all search results ance.

Notes	



CHAPTER 20: Managing 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 are looking 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."

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 closely matching products in your catalog.

Decro	west Sales Calleng	Mable Customers Pro-	nutions Newton		inguetta System			
() Later	Message Revender Change Mag	perits's default phone numbers and s	alouis before alle laur	0		You have 9 onlicat, 8	maps, 13 minur and 114 notice prevail message	ou Gale settle
Sea	eh .						O ARE	New Seattle 7
ner i	1 (E of 3 pages). Vev	20 💽 per page i Tabé 47 rec	ands found				Tes.	erene be
Same A	A Descent Ad & Debut Plates	1 (Desired Proton) if Speek bellet	e				Adven	
	Search Gamp	ittee .	Reads.	Nation of State	Barharigen Pas	Redeet	Display in Suggested Terms	Attes
Any +		•	From:	Fronc				
			Te:	Tel				
	channin	Main Website Madroon Wand English	21				Yes	Lat
12	Portable media Player	Main Webote Madican Island English					Ves	Lat
12	Expresso Cup - Block John	Main Website Madoon tstand English	*				Yes	Lat
п	Pleated Layer Top	Main Webste Madoon Island English	54				Vas	E.M.
8	elizabeth	Main Website Madoon taland English	1				Yes	-
11	nolta	Mam Website Madison Island English	1				Yes	Lat
11		Main Website Madosen listand English	5				Tel	Lat
п	magazine	Main Webste Madison Island English	8	1			Yes	LAS
8	hoppope set	Main Webste Madson Island English	13				Yes	6.00

Search Terms

To add a new search term:

- 1. On the Admin menu, select **Catalog > Search Terms**.
- 2. Click the Add New Search Term button. Then, do the following:
 - **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.

General Information	
Search Query*	
Store *	• 0
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 Y

General Information

b. Select the **Store** where the search term will be used. If your store is available in multiple languages, select the applicable store view.

- **c.** If this term is a synonym for another search term, enter the other term in the **Synonym For** field. Any search for the synonym will be 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, type 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, click the **Save Search** button.

To edit a search term:

- 1. On the Admin menu, select **Catalog > Search Terms**.
- 2. Click the row of any record to open the search term in edit mode.
- **3.** Make the necessary changes.
- **4.** When complete, click the **Save Search** button.

To delete a search term:

- 1. In the list, select the checkbox of the term to be deleted.
- 2. In the upper-right corner of the list, set the **Actions** control to "Delete."
- **3.** When complete, click the **Submit** button.

Notes	



CHAPTER 21: 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 Edition includes a number of features that support your ongoing effort to improve the indexing of your site, such as:

- Meta Information
- Sitemap
- Catalog URL Options
- Dynamic Media URLs
- Canonical Meta Tag
- URL Rewrites

Additional Resources Site Search The Seven Forgotten Pages of Magento and How to Optimize Them A Data-Driven Strategy for Conversion Optimization Benchmarking Your OMS Increasing Conversion Rates

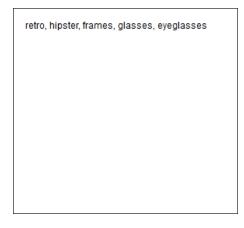
Meta Information

Your store is loaded with places where you can enter keyword-rich meta data to improve the way search engines index your site. While setting up your store, you might enter preliminary meta data, with the intention of finishing it later. Over time, you can fine-tune the meta data to target the buying patterns and preferences of your customers.



Meta Title

The meta title appears in the title bar and tab of your browser, and search results listings. The meta title should be unique to the page, and less than 70 characters in length.



Meta Keywords

Although some search engines ignore meta keywords, others continue to use them. The current best practice is to incorporate high-value keywords in the meta title and meta description.

Magento Community Edition 1.8.1.0 Is Here www.magentocommerce.com/.../magento.community-edition1... • Magento to 11, 2013 - Magento Community Edition 1.8.1 (b) a here! This latest release includes many contributions from the Magento developer community and ...

Magento - Knowledge Base - Magento Community Edition ... www.magentocommete.com / Knowledge Base - Magento Welcome to the documentation home page for the Magento Enterprise Edition (EE) 1.13 and Community Edition (CE) 1.8 releases Let's start out by telling you a ...

Magento: Ecommerce Software & Ecommerce Platform ... magento.com * Forester Consulting Inds Magento Enterprise Edition is a stable, scalable, and fexible platform hild control tables to revenue growth. Read this commissioned .

Magento Community Edition 1.8.0.0 Now Available! | Mage... magento.com/ ./magento../magento.community-edition-1800-one-asi... * Sep 25, 2013 - Left gee a big velcome to Magento Community Edition 18 This new edition improves tax calculations, boosts product quality and stability ...

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.

Sitemap

The default Magento sitemap has links to every product and category in your store, and can help improve the way your products are indexed by some search engines. Like a table of contents, the sitemap also gives visitors a quick overview of the organization of your catalog. To switch between the category and product lists, click the link on the right. By default, the footer of your store includes a link to the sitemap.

Sun Langsuage English	
Magento*	ACCOUNT THE CART
U Magento	٩
WOMEN MEN ACCESSORIES HOME & DECOR SALE VP	
PRODUCTS	
	Categories Sitemap
Vadison Lidard VIP HemberyNa - 1 Year Avlatts Songlasses Jackico Round Songlasses Nativ CAC Cynyllasses Chelman Tier Tari Tark Virladet Noti Top Kacer Itah Nati Oras Lafyette Canvortible Oras Lafyette Canvortible Oras Alad I News (Noto Orlas Alad I News (Noto Parts Avland I New (Not Orlas Alad I News (Noto Parts Aviand I New Noti Orlas	1-50 of 93 1 2 +
Can't stop it by toleaner Love is an Eternal Lie by The Sleeping Tree	
Fire (Kalima remin) by Unannounced Guest	
Broadway Pump	
Park Avenue Pleat Front Trouvers	
Budy Wash with Lemon Flawer Extract and Alas Vara	
Bath Heverals and Salt	
Shew Enfused Hydrating Budy Lation	
Tittan Raw Silk Pillow Shav Ivinted Pillow	

Sitemap

The sitemap can be formatted as a nested, tree-like structure, or as a simple list. The number of lines included per page, and the use of indentation is set in your system configuration.

Because the Magento sitemap does not include CMS pages, it is not a complete index to the content on your site. In addition to the default sitemap, it is recommended that you also generate a Google sitemap that can be used for reference when your site is indexed by Google.

To set up the sitemap:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Catalog, select **Catalog**.
- **2.** Click to expand the **Sitemap** section. Then, set the following options according to your preference:
 - Use Tree Like Category Sitemap
 - Minimum Lines per Page

Sitemap				٥
Use Tree Like Category Sitemap	Yes	T	[STORE VIEW]	
Minimum Lines per Page	30		[STORE VIEW]	
	<i>C</i> ''	<i>a c</i>		



- **3.** Scroll down the page and click to expand the **Search Engine Optimizations** section. Then, set **Autogenerated Site Map** to "Enable."
- **4.** When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Use Tree Like Category Sitemap	Store View	Determines if the sitemap is formatted as a nested, tree-like structure, or as a simple list. Options Inclde: Yes / No
Minimum Lines per Page	Store View	Determines the minimum number of lines that can appear per page. This works with the pagination controls to prevent the last page from having fewer than the minimum number of items allowed.

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 are created by enabling Web Server Rewrites.

```
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.

Store Code

The store code can be included in the URL. However, it might cause problems if third-party services, such as PayPal, are configured to work with a URL that does not include the code. By default, the store code is not included in URLs.

rt Options				
Add Store Code to Una	No • Warning! When using Stars Code in URLs, in so cares system may not work properly If URLs with Store Codes are specified in the third party servic (e.g. PayPal etc.).	out	loroeer1	
Auto-redirect to Base URL	Yes (302 Found) + Le redirect from http://example.com/store/ to http://www.example.com/store/	٠	lorowel	

URL Options

HTML Suffix

Your catalog can be configured to either include or exclude the .html 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.

The most important thing to understand is that the suffix is controlled by your system configuration. 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.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.

URL Options

Catalog URLs play a major role in how well your store is indexed by search engines. All of the following options use web server rewrites to change the format of the URL.

URL Suffix	Determines if a suffix, such as "html" or "htm," is used for category URLs. Do not enter a period before the suffix, because it is applied automatically.
Store Code	Inserts the Store Code of the current view in the URL immediately after the magento root.
Category Path	Determines if category paths are included in product URLs. However, doing so can impact SEO by creating multiple URLs that give the appearance of duplicate content.

To configure the URL suffix:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the Search Engine Optimizations section. Then, do the following:
 - a. Set **Product URL Suffix** to "html" or "htm." Do not include a period before the suffix.
 - b. Set Category URL Suffix to "html" or "htm." Do not include a period before the suffix.
 - **c.** Set the category path to your preference. To omit the category path from product URLs, set **Use Categories Path for Product URLs** to "No."
- 4. When complete, click the **Save Config** button.
- After the setting is saved, you will be prompted to refresh the cache. Click the Cache Management link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.

arch Engine Optimizations		
utogenerated Site Map	Enable	ISTORE VIEWO
opular Search Terms	Enable	Istone viewi
roduct URL Suffix	Intmi	(STORE VIEW)
	+ Cache refresh needed	
ategory URL Suffix	html	ISTORE VIEW
	» Cache refresh needed	
ise Categories Path for Product IRLs	Yes	ISTORE VIEWS
reate Permanent Redirect for RLs if URL Key Changed	Yes	[STORE VIEW]
age Title Separator	*	(STORE VIEW)
lse Carionical Link Meta Tag For ategories	(Yes	ISTORE VIEW
ise Canonical Link Meta Tag For Itoducts	Yes	ISTORE VIEW

Search Engine Optimizations

To include the store code in URLs:

- 1. On the Admin menu, select **System > Configure**. Then in the panel on the left under General, select **Web**.
- 2. Click to expand the URL Options section.
- 3. 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
```

- **4.** When complete, click the **Save Config** button.
- After the setting is saved, you will be prompted to refresh the cache. Click the Cache Management link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.

To include the category path in URLs:

- 1. On the Admin menu, select **System > Configure**. Then in the panel on the left under Catalog, select **Catalog**.
- 2. Click to expand the **Search Engine Optimizations** section.
- 3. Set Use Categories Path for Product URLs to "Yes."

URL with Category Path

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

- 4. When complete, click the **Save Config** button.
- After the setting is saved, you will be prompted to refresh the cache. Click the Cache Management link in the message at the top of the workspace. Then, follow the instructions to refresh the cache.

Dynamic Media URLs

A dynamic media URL is a relative reference to an image or other media asset. When enabled, dynamic media URLs can be used to link directly to assets on your server, or even on a CDN. As with all markup tags, the code is enclosed in double curly braces. The format of a dynamic media URL looks like this:

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

If you prefer to use a static URL, you can change the configuration setting. If dynamic media URLs are included in your catalog, but later the setting is disabled, each reference in your catalog will appear as a broken link. However, the links can be restored by again enabling dynamic media URLs. Using dynamic media URLs can enhance your catalog, but can also impact the performance of catalog search.

ontend			
List Mode	Grid (default)/List	[STORE VEW]	
Products per Page on Grid	9.15.30	ISTORE VIEW]	
Allowed Values	+ Comma-separated.		
Products per Page on Grid	9	(STORE VIEW)	
Default Value	+ Must be in the allowed values list.		
Products per Page on List	5,10,15,20,25	[STORE VEW]	
Allowed Values	- Comma-separated.		
Products per Page on List Default	10	[STORE VIEW]	
Value	+ Must be in the allowed values list.		
Allow All Products per Page	No	 [STORE VEW] 	
	"All" option in the "Show X P	er Page"	
	Dynamic	 ISTORE VEWI 	
Medi	a URLs		
Jse Flat Catalog Ca		• [GLOBAL]	
Use Flat Catalog Prodect		 [GLOBAL] 	
4	 Enable for reindexing a big number of 5KUs. 		
Allow Dynamic Media URLs in	Yes	 ISTORE VEW] 	
Products and Categories	 E.g. ((media uriv"path/to/image.jog")) ((skin uriv"path/to/picture.gif")). Dynamic directives p 	11 M M	
	unv pathnorpicture gif)). Dynamic directives p	araing	

Allow Dynamic Media URLs in Products and Categories

To configure dynamic media URLs:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Catalog, select Catalog.
- **3.** Click to expand the Frontend section. Then, set **Allow Dynamic Media URLs in Products and Categories** to either "Yes" or "No."
- 4. Click the **Save Config** button to save the setting.

To use static URLs by default for media files:

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

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under General, select Content Management.
- In the WYSIWYG Options section, set Use Static URLs for Media Content in WYSIWYG for Catalog to "Yes."
- 4. Click the **Save Config** button to save the setting.

Enable WYSIWYG Editor	Disabled by Default	[STORE VIEW]
Use Static URLs for Media	Yes 🔻	[GLOBAL]
Content in WYSIWYG for Catalog	Applicable to catalog products and categories only.	
	Any media content will be inserted into editor as a	
	static URL. It is not updated if the system configuration	
	base URL changes.	

Enable WYSIWYG Editor

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 domainname/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 menu, select **System > Configuration**.
- 2. In the panel on the left, select **Catalog**.
- 3. Click to expand the **Search Engine Optimizations** section.
- 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, click the **Save Config** button.

Notes	



CHAPTER 22: Managing 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 create search engine friendly URLs and to preserve existing links.

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Create Permanent Redirect for Old URL

Automatic Product Redirects

Your store can be configured to automatically generate a permanent redirect whenever the URL key of a product changes. In 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.

To set up automatic redirects:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the Search Engine Optimizations section. Then, set Create Permanent Redirect for URLs if URL Key Changed to "Yes."

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Create Permanent Redirect

4. When complete, click the **Save Config** button.

To automatically redirect catalog URLs:

- 1. On the Admin menu, select **Catalog > Manage Products**.
- **2.** Find the product in the list, and click to open the record.
- 3. In the URL Key field, do the following:
 - **a.** Make sure that the **Create Permanent Redirect for old URL** checkbox is selected. If not, complete the instructions to enable automatic redirects.
 - **b.** Update the **URL Key** as needed, using all lowercase characters and hyphens instead of spaces.
- **4.** When complete, click the **Save** button.

5. When prompted to refresh the cache and index, click the links in the messages that appear at the top of the workspace. Follow the instructions.

The permanent redirect is now in effect for the product and any associated category URLs.

6. To view the redirect records, select **Catalog > URL Rewrite Management**. The most recent permanent redirects are 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. The following instructions show how to use the URL Rewrite tool to create three different kinds of rewrites:

- Product Rewrite
- Category Rewrite
- Custom Rewrite

All rewrites reference a "Target Path" and "Request Path," as shown in the following examples. The "Request Path" is the old URL, and the "Target Path" is where you want the URL to go from now on.

Example: Permanent 301

Redirect Type:	Permanent 301
Request Path:	catalog/category/id/6
Target Path:	category-1.html

Example: Temporary 302

Redirect Type:	Temporary 302
Request Path:	<pre>product.html http://magentocommerce.com</pre>
Target Path:	catalog/category/id/6

You can use rewrites to create additional URLs for items, as a temporary seasonal change, or as a permanent change. Rewrites can be created for any valid path, including CMS content pages. Internally, the system references products and category by ID. No matter how often the URL changes, the ID remains the same. Here are some ways you can use URL rewrites:

Original URL

http://www.example.com/peripherals/ergonomic-keyboard.html

Additional Product URL

http://www.example.com/best-keyboard.html

Additional Category URL

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http://www.example.com/all-on-sale.html
```

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http://www.example.com/save-now/spring-sale
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URL Rewrite Management

Field Descriptions

FIELD	DESCRIPTION	
Create URL Rewrite	Indicates the type of rewrite changed after the rewrite is o For Category For Product Custom	to be made. The type cannot be created. Options include:
ID Path	The ID of the target page. The the same page.	ne ID Path and Target Path refer to
Request Path		to be redirected. Depending on your Path might include the .html suffix
	brand/brandname	
	catalog/category/vie	w/id/56
	private-sale-shoes/p	
	brand/brandname.html	-
	previously. If you have made	que, and must not have been used e several attempts to redirect the ccessful redirects and refresh the
Target Path	The URL that points to the d be a different CMS page, or	estination page. The Target Path can the result of a search.
		e Not Found" error, the path must rem expects to find. The following ths:
	brandname	
	brand/brandname	
	catalog/category/vie	w/id/52
	catalogsearch/advanc	ed/result/?brand=brandname
	http://magentocommer	ce.com
Redirect	Indicates whether the rewrite include:	e is temporary or permanent. Options
	No	No redirect is specified.

FIELD	DESCRIPTION	
	Temporary (302)	Indicates to search engines that the rewrite is for a limited duration. Search engines do not preserve page rank information for temporary rewrites.
		In the URL Rewrite Management list, temporary redirects have 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.
		In the URL Rewrite Management list, permanent redirects have the letters "RP" in the Options column.
Description	Describes the purpose of the and is not visible to custom	ne rewrite. This field is for reference ners.

Field Descriptions (cont.)

Configuring URL Rewrites

URL rewrites make it possible to make "search engine friendly" URLs by adjusting the format and content. Initially, all Magento URLs include a file called "index.php" that resides in the root folder. By default, the file name appears in the URL just after the name of the root folder. When Web Server Rewrites are enabled, the system rewrites the URL to omit "index.php." The rewrite has no impact on performance or site rank, and is more of a usability issue than anything else.

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 menu, select **System > Configuration**.
- 2. In the panel on the left under General, select **Web**.
- **3.** Click to expand the **Search Engine Optimization** section.
- 4. Set Use Web Server Rewrites to "Yes."

Search Engines Optimization		٩
Use Web Server Rewrites	Yes T	[STORE VIEW]

Search Engine Optimization

5. When complete, click the **Save Config** button.

Product Rewrite

Before you begin, you should know exactly what you want the redirect to accomplish. Just remember— the "Request Path" is the old URL, and the "Target Path" is where you want the URL to go from now on. To manage multiple paths that lead to the same product, see: Canonical Meta Tag.

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New Product Rewrite

Process Overview: Step 1: Get the Product ID of the Target URL Step 2: Create the Product Rewrite Step 3: Refresh the Index Step 4: Test the Rewrite

Step 1: Get the Product ID of the Target URL

- 1. On the Admin menu, select **Catalog > Manage Products**.
- **2.** Find the product in the list that is the destination of the rewrite and take note of its product ID.

Step 2: Create the Product Rewrite

- 1. On the Admin menu, select Catalog > URL Rewrite Management.
- 2. In the upper-right corner, click the Add URL Rewrite button.
- 3. Set Create URL Rewrite to "For product."

Create URL Rewrite:	For product	-	

Create URL Rewrite for Product

- 4. In the list, find the product that you want to redirect, and click the record.
- Scroll down to the bottom of the Select Category tree, and click the Skip Category Selection button.
- 6. In the URL Rewrite Information section, do the following:

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Description		

URL Rewrite Information

- a. If you have multiple stores, set **Store** to the specific view where the rewrite applies.
- **b.** In the **Request Path** field, enter the URL key of the page 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.
- 7. When complete, click the **Save** button.

Your new product rewrite now appears at the top of the list.

Step 3: Refresh the Index

- 1. On the Admin menu, select **System > Index Management**.
- 2. Select the Catalog URL Rewrites checkbox.
- 3. Set the Actions control to "Reindex Data," and click the Submit button.

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Refresh Catalog URL Rewrite Index

Step 4: Test the Rewrite

Test the rewrite from your store, to make sure that it works correctly.

Category Rewrite

If a category changes, or no longer exists, you can use a category rewrite to redirect links that point to the previous category to another URL. It is possible to have multiple URLs that point to the same product, if your store is configured to include categories in the URL key. To manage multiple paths that lead to the same product, see: Canonical Meta Tag.

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Select Category

Process Overview: Step 1: Get the Category ID of the Target URL Step 2: Create the Category Rewrite Step 3: Refresh the Index Step 4: Test the Rewrite

Step 1: Get the Category ID of the Target URL

- 1. On the Admin menu, select Catalog > Categories > Manage Categories.
- 2. In the category in the tree, find the target category and click to open the record.
- **3**. Take note of its category ID at the top of the page.

Step 2: Create the Category Rewrite

- 1. On the Admin menu, select **Catalog > URL Rewrite Management**.
- 2. In the upper-right corner, click the **Add URL Rewrite** button.
- **3.** By default, **Create URL Rewrite** is set to "For category." In the category tree, click to select the category to be redirected.
- **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.
- 5. When complete, click the **Save** button.

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Category URL Rewrite Information

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New Category Rewrite

6. Test the rewrite from your store, to make sure that it works correctly.

Step 3: Refresh the Index

- 1. On the Admin menu, select System > Index Management.
- 2. Select the Catalog URL Rewrites checkbox.
- 3. Set the **Actions** control to "Reindex Data," and click the **Submit** button.

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Refresh Catalog URL Rewrite Index

Step 4: Test the Rewrite

Test the redirect from your store, to make sure that it works correctly. Make sure that the URL you test goes directly to the 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/
```

Custom Rewrite

You can use a custom rewrite to redirect CMS pages, or any other type of page. For example, if you change the URL key of the privacy policy from privacy-policycookie-restriction-mode to privacy-policy, the link in the cookie restriction mode will return "404 - Page Not Found." To redirect traffic to the new URL key, create a custom rewrite with the following settings:

ID Path:	privacy-policy
Request Path:	privacy-policy-cookie-restriction-mode
Target Path:	privacy-policy
Redirect:	Permanent (301)

Before you begin, figure out the URL keys that you need for the ID Path, Request Path, and Target Path. Just remember— the "Request Path" is the old URL, and the "ID Path" and "Target Path" are the new URL.

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New Custom Rewrite

Process Overview:
Step 1: Establish the Request and Target Paths
Step 2: Create the Custom Rewrite
Step 3: Refresh the Index
Step 4: Test the Rewrite

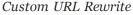
Step 1: Establish the Request and Target Paths

Before you begin, write down the URL key of the page to be redirected (Request Path), and the target page where it will be redirected (Target Path).

Step 2: Create the Custom Rewrite

- 1. On the Admin menu, select Catalog > URL Rewrite Management.
- 2. In the upper-right corner, click the Add URL Rewrite button.
- 3. Set Create URL Rewrite to "Custom."

Create URL Rewrite: Custom



- 4. In the URL Rewrite Information section, do the following:
 - **a.** If you have multiple stores, select the **Store** where the rewrite applies.
 - b. In the ID Path field, enter the relative path of the destination page.
 - To redirect to another CMS page in your store, enter the relative path to the page, without a leading forward slash.
 - To redirect to a page on a different site, enter the fully qualified URL of the new destination.

new-page	URL key of target page.
somewhere/new-page	Relative path to target page, without leading forward slash.
http://magento.com	Fully qualified URL of target page on external website.

- c. In the **Request Path** field, enter the relative path of the page to be redirected.
- **d.** In the **Target Path** field, enter the valid URL of an existing page that will be the new destination. This refers to the same page as the ID Path.
- e. Set **Redirect** to one of the following:
 - Temporary (302)
 - Permanent (301)
- f. For your own reference, enter a brief **Description** of the rewrite.

In the following illustration, the CMS page "about-magento-demo-store" is temporarily redirected to the target, "my-page."

Rewrite Information	Para da como de la como			
pe"	Cuttore	(#)		
****	English			
Puth *	my page			
quest Path *	about magento-demo-store			
rget Path *	my page			
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scription .				

Custom URL Rewrite Information

5. When complete, click the **Save** button.

Your new rewrite now appears at the top of the list.

Step 3: Refresh the Index

- 1. On the Admin menu, select **System > Index Management**.
- 2. Select the Catalog URL Rewrites checkbox.
- 3. Set the **Actions** control to "Reindex Data," and click the **Submit** button.

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Refresh Catalog URL Rewrite Index

Step 4: Test the Rewrite

Test the rewrite from your store, to make sure that it works correctly.

Notes



Marketing & Promotions

In this section...

Promotions

Shopping Tools

Newsletters

Sales Channels

Google Tools



CHAPTER 23: Promotions

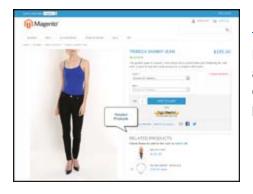
In this chapter, you will learn how to set up product relationships, and use price rules to trigger discounts based on a variety of conditions. Here are a few ways you can use price rules to offer incentives to your customers:

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

With price rules, you can set up your promotions in advance, so they spring into action whenever the required conditions are met.

Product Relationships

An easy way to promote products throughout your catalog is to establish relationships between 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 compliment, enhance, or add optional features to the product.

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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.

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Cross-sells

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

Catalog Price Rules

Catalog price rules can be used to selectively put products on sale under certain conditions. Catalog price rules do not use coupon codes, because they are triggered before a product is placed into the shopping cart.

Magento Admin Panel						Global Reco	d Search		Logged in an admin	Thursday, May 1, 2	114 Dis Mourris Gal	infine Louis	
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Catalog Rules

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 menu, select **Promotions > Catalog Price Rules**.
- 2. In the upper-right corner, click the **Add New Rule** button.

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

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Rule Information

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

To select multiple options, hold down the Ctrl key (PC) or Command key (Mac), and click each option.

- e. Set **From Date** and **To Date** to define the range of dates when the rule will be in effect. If you leave the dates blank, the rule is enabled as soon as the price rule is saved.
- f. 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. If you want to apply the rule to all products, leave the conditions blank.

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

Conditions (leave blank for all products)	
If <u>ALL</u> of these conditions are <u>TRUE</u> :	

Condition - Line 1

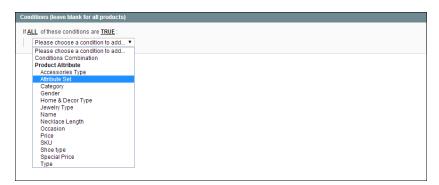
The statement has two underlined links, which when clicked, display the options for that part of the statement. If you save the condition without making additional selections, the rule will apply to all products.

- 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.

```
If <u>ALL</u> of these conditions are <u>TRUE</u>:
```

- 2. Click the Add 🛞 button at the beginning of the next line.
 - **a.** In the list under **Product Attribute**, select the attribute that you want to use as the basis of the condition. For this example, the selected 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: Attribute Frontend Properties.

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

If	ALL	of	thes	se	conditions	are	TRUE:
Att	cribu	ıte	Set	is	<u>3</u>		

- **b.** Click the **is** link, and select the comparison operator that is needed to describe the condition to be met. In this example, the options are "IS" or "IS NOT."
- **c.** Then, click the <u>...</u> "more" link, and choose the attribute set upon which the condition is based.

Attribute Set is	Eyewear Default	▼ ⊗
۲	Books & Music	
	Accessories Bed & Bath	
	Clothing Electronics	
	Eyewear	
	Home & Decor	
	Jewelry Shoes	
	caps	
	My Attribute Set	

Condition Line 2, Part 3

The selected item appears in the statement to complete the condition.

```
If <u>ALL</u> of these conditions are <u>TRUE</u>:
Attribute Set <u>is</u> Eyewear
```

- **3.** To add another line to the statement, click the **Add (a)** 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, click the **Delete** \otimes button at the end of the line.

Step 3: Define the Actions

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

pdate Prices Using the Following In	formation	
Apply	By Percentage of the Original Price	۲
Discount Amount *	10	
Enable Discount to Subproducts	No	۲
Stop Further Rules Processing	Yes	۲

Actions

2. In the Update Prices Using the Following Conditions section, set **Apply** to one of the following options:

By Percentage of the
Original PriceDiscounts 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.
By 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.
To Percentage of the Original Price	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.
To Fixed Amount	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 **Enable Discount to Subproducts** to "Yes." Then, enter the **Discount Amount** to apply.
- 4. If you want to stop the processing of other rules after this rule has been applied, set Stop Further Rules Processing to "Yes." This safeguard prevents customers from receiving multiple discounts for the same product.
- 5. Click the **Save and Continue Edit** button to save your changes.

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:
 - Click the Save and Apply button.
 - From the Catalog Price Rules list, click the **Apply Rules** button.
- 2. When you create a new price rule, it might take an hour or so for it to become available. 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.

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.

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Selecting Multiple SKUs for a Price Rule Condition

To apply a price rule to multiple SKUs:

- 1. On the Admin menu, select **Promotions > Catalog Price Rules**.
- **2.** Do one of the following:
 - Follow the instructions to create a catalog price rule.
 - In the list, click to open the catalog price rule that you want to change.
- **3.** In the panel on the left, select **Conditions**. Then, do the following:
 - a. In the first line, set the first parameter to "ANY."

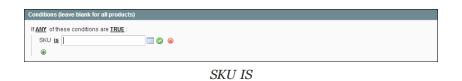
Conditions (leave blank for all products)	
If <u>ANY</u> of these conditions are <u>TRUE</u> :	
If ANY of these conditions are TRUE	

b. If the price rule doesn't have a line for SKU, Click the **Add •** button at the beginning of the next line. Then, in the list under Product Attribute, select **SKU**.

onditions (leave blank for all products)	
ANY of these conditions are TRUE :	
Please choose a condition to add 🔻	
Please choose a condition to add Conditions Combination Product Attribute	
Accessories Type Attribute Set	
Category Gender Home & Decor Type	
Jewelry Type Name	
Necklace Length Occasion	
Price	
SKU Shoe type	
Special Price Type	

Choose the Condition

c. Click the <u>...</u> "more" link to display more options. Then, click 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, click the **Select** 📀 button to add the SKUs to the condition.



Multiple SKUs Added to Condition

- 4. Complete the rule, including any Actions to be taken when the conditions are met.
- 5. To apply the rule, click the **Save Rule** button.
- 6. When you create a new price rule, it might take an hour or so for it to become available. 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.

Shopping Cart Price Rules

Shopping cart price rules create discounts for orders at the checkout level, based on a set of conditions. The discount can be applied automatically when the conditions are met, or be applied when the customer enters a valid coupon code. When applied, the discount appears on the shopping cart page under the subtotal.

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

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EMPTY.CARL UPDATE S	KOPENICARE - CONTINUES	SERVE CITY	78*	
HAVE OUESTIONS?				ESTIMATE
Call Customer Support at 1-800-555-1212				5.87074, \$224.00 740 \$18.48
	EMAEL CUSTOMER SUPPORT			TOTAL \$242.48

Apply Coupon in Shopping Cart



Step 1: Add a New Rule

 On the Admin menu, select Promotions > Shopping Cart Price Rules. Then, click the Add New Rule button.

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7 Get 10% off an shipping in NJ		May 3, 2013	+ 1	hate	Main Website	
8 Get 55 off for any Gilt Card		May 3, 2013		Active	Main thebalte	
9 Get \$50 with Pagpal Express Checksult for orders over \$200		May 3. 2013	-	10.04	Man Prebaile	
18 Get 10% of # automal is \$508		May 3, 2013	-	Adla	Main maturite	
11 Get \$25 off order total on order over \$200	Repotent2	May 3, 2013	14 C	4:54	Main Hebuile	
14 Free shipping on all Home & Decoriteme		May 1.2013		4:54	Main theophe	
11 Provide 25% off on the product price discount	RTL250#F	Apr 1, 2013	-	Ac8+0	Man Website	
25 Free abigging on all orders over \$505		May 3, 2913	-	Active	Main Historite	
38 Buy 1 Par and pet the 2nd one FREE		Hay 3.2013	-	Active	Man metode	
42 25% of Apparei for General customers	25047	May 3.2013		Active	Man matada	
43 11% Evening Dresses	evening 11	May 3, 2013		4/5/4	Main menute	

Shopping Cart Price Rules

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

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	From Date			10		
	To Date			10		
	Priority					
	Public In RED Fred		784			

Shopping Cart Price Rule General Information

- **2.** Under General Information, complete the **Rule Name** and **Description**. These fields are for internal reference only.
- 3. If you want 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.
 - To make the promotion available only to registered customers, do not select the "NOT LOGGED IN" option.
 - To select multiple options, hold down the Ctrl key (PC) or Command key (Mac), and click each 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.

- 6. To define the "good through" date range for the promotion, do the following:
 - **a.** Click the **Calendar** button next to the **From Date** field, and choose the first date. The promotion will start at the beginning of that day.
 - **b.** Click the **Calendar** 🖪 button next to the **To Date** field, and choose the last date. The promotion will stop at the end of that day.
- **7.** Enter a number to determine the **Priority** of this price rule in relation to the Action settings of other price rules that might be active at the same time. (Number 1 has the highest priority.)
- 8. To apply the rule to published listings in RSS feeds, set Public In RSS Feed to "Yes."

Step 2: Define the Conditions

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

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

If \underline{ALL} of these conditions are \underline{TRUE} :

The statement has two underlined links which when clicked, 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.

Apply the rule only if the following conditions are met (leave blank for all products)
If <u>ALL</u> of these conditions are <u>TRUE</u> : ③

Condition - Line 1

- 2. Click the Add
 button 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



Condition - Line 2, Part 1

Example 1: Regional Price Rule

To create a regional price rule, select one of the following cart attributes:

- Shipping Postcode
- Shipping Region
- Shipping State/Province
- Shipping Country

Example 2: Shopping Cart Totals

To base the condition on shopping cart totals, select one of the following cart attributes:

- Subtotal
- Total Items Quantity
- Total Weight

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 underlined word is a building block that describes a different aspect of the condition.

3. In the list under **Product Attribute**, select the attribute upon which the condition is based. For this example, the selected condition is "Attribute Set."

Apply the rule only if the following conditions are met (leave blank for all products)
If ALL of these conditions are TRUE :
If an item is <u>FOUND</u> in the cart with <u>ALL</u> of these conditions true: 😡
Please choose a condition to add 🔻
Please choose a condition to add
Conditions Combination
Cart Item Attribute
Price in cart
Quantity in cart
Row total in cart
Product Attribute Accessories Type
Attribute Set
Category
Gender
Home & Decor Type
Jewelry Type
Name
Necklace Length
Occasion
Price
SKU
Shoe type
Special Price

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."

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

Condition - Line 2, Part 2

```
If <u>ALL</u> of these conditions are <u>TRUE</u>:
If an item is <u>FOUND</u> in the cart with <u>ALL</u> of these conditions true
Attribute Set <u>is</u> ...
```

- 4. Click the <u>is</u> link, and select the comparison operator that is needed to describe the condition to be met. In this example, the options are "IS" and "IS NOT."
- 5. Click the ... "more" link, and choose the attribute set upon which the condition is based. The selected item appears in the statement to complete the condition.



Completed Condition

```
If <u>ALL</u> of these conditions are <u>TRUE</u>:
Attribute Set <u>is</u> Electronics
```

- 6. To add more conditions, click the Add
 button and again, 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, click the **Delete** \otimes button 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.

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Larent Message Bereder Charge	Vagents's default phone numbers and colliculs beh	Concentration of the local distance of the l		The face 5 offers, 5 maps, 18 mills and 198 hence unread message(s). So is helds along
Shopping Cart Price Rule	a New Rule			Collect. Hener @ Save @ Save and Continue fill
Rule Information				
Conditions	Update prove a sing the following in	Armaine		
Actions	Apply	Percent of product price discour		
Labels	Discourt Amount*	la .		
	Maximum Ob Discount is Applied To	9		
	Discourt Dis Dieg (Day 7)			
	Apply to Dispatrip Amount	144	•	
	Free Shaping	840	• 3	
	Disp Further Rules Processing	(Na	•	

Shopping Cart Price Rule Actions

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

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

3. Enter the **Discount Amount** as a number, without symbols. For example, depending on the discount option selected, the number 10 might indicate a percentage, a fixed amount, or a quantity of items.

- **4.** In the **Maximum Qty Discount is Applied To** field, enter the largest number of the same product that can qualify for the discount.
- **5.** To determine how free shipping is applied, set **Free Shipping** to one of the following:

No	Free shipping is not available for the promotion.
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.

- 6. Set **Stop Further Rules Processing** to "Yes" to stop processing other rules as soon as this one is applied. This safeguard prevents customers from receiving multiple discounts for the same purchase.
- 7. To define an additional action that applies to specific items in the cart, only when a specific set of conditions is met, click the **Add** (a) button. Then, choose an item from the following sections in the list:
 - Cart item attribute
 - Price in cart
 - Quantity in cart
 - Row total in cart
 - Product attribute (from all available in your catalog)

Add as many levels as you need to describe the conditions to be met.

8. When complete, click the **Save Rule** button.

Step 4: Complete the Labels

The label appears on the order below the subtotal to identify the discount. You can enter a default label for all store views, or enter a different label for each view.

- **1.** In the panel on the left, select **Labels**.
- 2. In the Default Label section, enter the text for the **Default Rule Label for All Store Views**.

Default Label	
Default Rule Label for All Store Views	

Default Label

3. In the Store View Specific Labels section, enter the label text for each store view. For example, if each store view is in a different language, enter the label translation for each view.

pre View Specific Labels	
Main Website	
Madison Island	
English	
French	
German	
Private Sales Website	
Private Sales Store	
Private Sales View	

Store View Specific Labels

Step 5: Apply the Rule

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

Field Descriptions

FIELD	DESCRIPTION
RULE INFORMATION	
Rule Name	(Required) The name of the rule is for internal reference.
Description	A description of the rule should include the purpose of the rule, and explain how it is used.
Status	(Required) Determines if the rule is currently active in the store. Options include: 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 include:

FIELD DESCRIPTION No Coupon There is no coupon associated with the rule. Specific Coupon A specific coupon is associated with the rule. Coupon Code When prompted, enter the Coupon Code that the customer must enter to take advantage of the promotion. Use Auto Select the checkbox Generation to automatically generate multiple coupon codes which can be used with the promotion. 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 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. From Date The first date in the "good through" time period when the coupon can be used. To Date The last date in the "good through" time period when the coupon can be used. Priority A number that indicates the priority of this rule in relation to others. The highest priority is number 1. Public in RSS Feed Determines if the promotion is included in your store's public RSS feed. Options include: Yes / No.

Field Descriptions (cont.)

ACTIONS

Field Descriptions (cont.)

FIELD	DESCRIPTION	
Apply	Determines the type of calcupurchase. Options include:	ulation that is applied to the
	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 percentage 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 dis	scount that is offered.
Maximum Qty Discount is Applied To	Sets the maximum number of applied to in the same purcha	of products that the discount can be ase.
Discount Qty Step (Buy X)	Sets the number of products Free" promotion.	represented by "X" in a "Buy X Get Y
Apply to Shipping Amount	Determines if the discount c Options include: Yes / No.	an be applied to the cost of shipping.
Free Shipping	Determines if free shipping is for which items. Options incl	s included in the promotion, and if so, lude:

FIELD	DESCRIPTION	
	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.
Stop Further Rules Processing		s can be applied to this purchase. To rom being applied to the same ons include: Yes / No
DEFAULT LABEL		
Default Rule Label for All Store Views	Enter a default label to identi all store views.	fy the discount that can be used for
Store View Specific Labels	If applicable, enter a differen each store view.	t label to identify the discount for

Field Descriptions (cont.)

Coupon Codes

Coupons codes can be associated with shopping cart price rules to apply a discount when a set of conditions is met. For example, a coupon code can be created for a specific customer group, or for anyone who makes a purchase over a certain amount.



In-store Coupon for Mobile Users

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. You can even create in-store coupons with a quick response code that shoppers can scan with their smart phones. The QR code links to a page on your site with more information about the promotion.

To apply the coupon to a purchase, the customer enters the coupon code during checkout from the shopping cart page of your site, or possibly at the cash register of your "brick and mortar" store.

Search entre store here. 9
Enter Your Coupon Code
SUBTOTAL INSUGARY CODES 12345678 APPLY
\$2.00
sustoria. s2
GRAND TOTAL \$2.0
CHTNLE SHOPPING
-08-
REACEED TO CHECKOUT
CONNECT WITH US NEWSLETTER
1 PA2800K 0.005000

Enter Coupon Code in Shopping Cart

To set up a coupon code:

- 1. Follow the instructions to create a shopping cart price rule.
- **2.** On the General Information page, do the following:
 - a. Set Coupon to "Specific Coupon."
 - **b.** Do one of the following:
 - Enter a numeric **Coupon Code** to be used with the promotion.
 - Select the Use Auto Generation checkbox.
 - **c.** To limit the number of times the coupon can be used, complete the following:
 - Uses per Coupon
 - Uses per Customer

If you leave these fields blank, there will be no limit on the number of times the coupon can be used.

If you leave the date range empty, the rule will never expire.

Coupon *	Specific Coupon 🔻
Coupon Code *	1234
	Use Auto Generation
	If you select and save the rule you will be able to
	generate multiple coupon codes. Important: If this shopping cart price rule has been
	used in an automated email reminder rule it will be
	automatically unassigned after shopping cart price rule is saved.
Linea per Coupon	13 SUTCU.
Uses per Coupon	
Uses per Customer	1
From Date	03/21/2014
To Date	03/21/2014
Priority	
Public In RSS Feed	No

Price Rule Coupon Code Settings

3. Follow the standard instructions to complete the shopping cart price rule.

Auto-Generated Coupon Codes

Batches of discount coupon codes can be formatted and generated automatically. Coupon codes can also be exported, and incorporated into other applications. For example, you might use a series of auto-generated coupon codes to produce printed coupons with unique codes.

Magento Admin	Panel		Global Record Search	Logged in as admin / Thursday, May 1.	2014 In Massim Section 1
Deliterat Sales Co	ang I	Mass Datates Dente	Newsletter CATL Reports System		
D Latest Message Raminder ()	hange klap	ents's default phase numbers and satisda	terfore sile launch	Visu have 1 unlight, 6 maps, 18 minut and 121 a	utile united transage(s): Sector with
ihopping Cart Price Rul		A 100 Compare(1) have been perm	22.5		
Aux internation	14	Contraction of the second second			
Conditions		Set Rule 'Get 10% off o	n shipping in NJ'	Collect Read Collector C	Select D Select and Combine
Actions					
Labels		Compares Information			
Manage Coupse Codes	15	Caupon Qly *	100		
		Code Length *	10		
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		IT PRIJORPTXES		May 1, 2014 2 48 22 FM	The

Generated Coupon Codes

To configure auto-generated codes:

- **1.** On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Customers, select **Promotions**. Then, click to expand the **Auto Generated Specific Coupon Codes** section.

Auto Generated Specific Coupon	l Codes		٥
Code Length	12 A Excluding prefix, suffix and separators.	[GLOBAL]	
Code Format	Alphanumeric	▼ [GLOBAL]	
Code Prefix		[GLOBAL]	
Code Suffix		[GLOBAL]	
Dash Every X Characters		[GLOBAL]	
	If empty no separation.		

Auto Generated Specific Coupon Codes

3. To create a specific format for your codes, enter the following:

- Code Length
- Code Format
- Code Prefix
- Code Suffix
- Dash Every X Characters
- **4.** When complete, click the **Save Config** button.

These settings can be overridden from the Shopping Cart Price Rule page.

To generate a batch of coupon codes:

- 1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**.
- 2. Select an existing rule, or create a new one.
- **3.** Set **Coupon** to "Specific Coupon." Then, do the following:
 - a. Select the Use Auto Generation checkbox.
 - **b.** Complete the other rule settings as needed.
- 4. Click the Save and Continue Editing button.
- 5. In the panel on the left, select **Manage Coupon Codes**. Then, do the following:
 - **a.** In the **Coupon Qty** field, enter the number of codes to be generated.
 - **b.** Adjust the code format settings, as needed.
 - c. Click the **Generate** button.

The generated coupon codes appear below. The list shows how many times each coupon code has been used.

To delete coupon codes:

- 1. In the list, select the checkbox of each code that you want to delete.
- 2. Set the Actions control to "Delete."
- 3. Click the **Submit** button. When prompted, click **OK** to confirm.

To export coupon codes:

- **1.** In the list of generated codes, use the filter controls at the top of each column to display the codes that you want to export.
- 2. Set **Export to** to the file format that you want to use for the data file.
- **3.** Click the **Export** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION	
Code Length	Global	Defines the length of the prefix, suffix and	the coupon code, excluding separators.
Code Format	Global	Defines the coupon of include:	code format. Options
		Alphanumeric	Any combination of letters and numbers.
		Alphabetical	Letters only.
		Numeric	Numbers only.
Code Prefix	Global		ded to the beginning of all do not want to use a prefix,
Code Suffix	Global		ded to the end of all codes. use a suffix, leave the field
Dash Every X Characters	Global		lash (-) can be inserted into /ou do not want to use a blank.
		Coupon codes that considered to be dif	differ by only a dash are ferent codes.

Coupon Report

To learn how your coupons are used, you can run a detailed coupon usage report for each website, store, or view.

To generate a coupon report:

- 1. On the Admin menu, select **Reports > Sales > Coupons**.
- 2. In the upper-right corner, set **Show Report For** to define the scope of the report.
- **3.** Set the filters as needed. Then, do one of the following:
 - To include coupon codes from all price rules in the report, set **Shopping Cart Price Rule** to "Any."
 - To include coupon codes related to specific rules, set **Shopping Cart Price Rule** to "Specified." Then, select the rules that you want to include in the report.
- **4.** When complete, click the **Show Report** button.

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Apr 11, 2013 104-2007F people 294 off on the product discount and 4 reveare 1 \$6,796.00 \$1,307.20 \$5,426.00 \$4,207.20 points	
Apr 17, 2013 WH2,200FF provide 20% off on the product docount and 4 reward 1 00.000,00 \$1,320,00 \$5,200,00 \$5,200,00 \$1,300,00 \$1,320,00	81.42
port	
Apr 22, 2013 OEX250FF Preventer 25% off on the product 1 5465.00 \$1521.25 \$3501.75 \$0.00 \$80.06	85.20
V925CF7 Provide 525 off an whole shapping cart. 9 \$556.00 \$25.00 \$1.00 \$0.00	81.30
2 \$1,035.00 \$146.25 \$200.75 \$1.00 \$0.00	3
Apr 23, 2013 RTL2SOFF Provide 25% of an the product price document 1 \$3,400.00 \$850.00 \$2,550.00 \$8.00 \$0.00	3
RTL450FF \$45 fixed amount document on the where cart 1 \$500.00 \$465.00 \$255.00 \$2.00 \$0.00	3

Coupon Usage Report

Free Shipping Promotion

Free shipping can be offered as a promotion, either with, or without a coupon. A free shipping coupon, or voucher, can also be applied to customer pick-up orders, so the order can be invoiced and "shipped" to complete the workflow.

Some shipping carrier configurations give you the ability of offer free shipping based on a minimum order. To expand upon this basic capability, you can use shopping cart price rules to create complex conditions based on multiple product attributes, cart contents, and customer groups.

Process Overview: Step 1: Enable Free Shipping Step 2: Create the Shopping Cart Price Rule Step 3: Test the Rule

Step 1: Enable Free Shipping

- 1. Enable the Free Shipping method in the configuration of your store.
- **2.** Complete the free shipping settings for any carrier service that you want to use for free shipping.

Step 2: Create the Shopping Cart Price Rule

- 1. On the Admin menu, select **Promotions > Shopping Cart Price Rules**.
- 2. Follow the steps below to set up the type of free shipping promotion that you want to offer.
- **3.** When complete, click the **Save Rule** button.

When you create a new price rule, it might take an hour or so for it to become available. 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.

Example 1: Free Shipping for Any Order

- 1. Complete the **General Information** settings as follows:
 - a. Enter a **Rule Name** for internal reference.
 - b. Set Status to "Active."
 - c. Set **Website** to "Main Website." (Click to make sure the entry is selected.)
 - d. Select the **Customer Groups** to which the rule applies.

- **e**. Do 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, set **Coupon** to "Specific Coupon." If necessary, complete the instructions to set up a coupon.
- 2. 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."

Update prices using the following information			
Apply	Percent of product price discount	۲	
Discount Amount*	0		
Maximum Qty Discount is Applied To	0		
Discount Qty Step (Buy X)			
Apply to Shipping Amount	Yes	۲	
Free Shipping	For shipment with matching items	۲	
Stop Further Rules Processing	No	۲	
Add Reward Points			

Price Rule Action

- 3. In the panel on the left, select **Labels**. Then, do one of the following:
 - Enter a **Default Rule Label for All Store Views**. This label is visible to the customer.
 - If your store is available in multiple stores, enter a label for each view, as needed.
- 4. When complete, click the **Save Rule** button.

Example 2: Free Shipping for Orders Over \$Amount

- 1. Complete the **General Information** settings as follows:
 - a. Enter a Rule Name for internal reference.
 - b. Set Status to "Active."
 - c. Set **Website** to "Main Website." (Click to make sure the entry is selected.)
 - d. Select the **Customer Groups** to which the rule applies.
 - **e.** Do 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, set **Coupon** to "Specific Coupon." If necessary, follow the instructions to set up a coupon.
- 2. In the panel on the left, select **Conditions**.
- 3. Click the Add button to insert a condition. Then, do the following:
 - a. In the list under Cart Attribute, click Subtotal.
 - b. Click the underlined is link, and select "equals or greater than."
 - **c.** Click the <u>...</u> "more" link, and enter a threshold value for the Subtotal, such as 100, to complete the 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, click the **Save Rule** button.

Step 3: Test the Rule

When you create a new price rule, it might take an hour or so for it to become available. 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 shopping 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 Shopping 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 Shopping Cart Price Rule

Complete Step 1 of the shopping cart price rule instructions to create a shopping cart rule with the general information.

Step 2: Define the Conditions

Complete Step 2 of the shopping cart instructions to define the conditions for the price rule. The conditions can be triggered by purchasing a specific product, making a purchase of a certain amount, or any other scenario.

Step 3: Define the Actions

- 1. In the panel on the left, select **Actions**. Then, do the following:
 - a. Set Apply to "Buy X get Y free (discount amount is Y)."
 - b. Set **Discount Amount** to 1. This is the quantity the customer will receive for free.
 - **c.** In the **Discount Qty Step (Buy X)** field, enter the quantity that the customer must purchase to qualify for the discount.

Apply	Buy X get Y free (discount amount is Y)	۲
Discount Amount *	1	
Maximum Qty Discount is Applied To	0	
Discount Qty Step (Buy X)	3	
Apply to Shipping Amount	Yes	۲
Free Shipping	For shipment with matching items	۲
Stop Further Rules Processing	No	۲
Add Reward Points		

Buy X Get Y Free

2. Click the **Save and Continue Edit** button. Then, complete the rest of the rule as needed.

Step 4: Complete the Label

Complete Step 4 of the shopping cart price rule instructions to enter the label that appears during checkout.

Step 5: Apply the Rule

- **1.** When complete, click the **Save Rule** button.
- 2. When you create a new price rule, it might take an hour or so for it to become available. 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

Shopping 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 shopping cart rule.

Step 2: Define the Conditions

- **1.** In the panel on the left, select **Conditions**.
- 2. Click the Add
 button at the beginning of the next line, and select Product Attribute Combination.

LL of these conditions are TRUE :		
Please choose a condition to add •		
Please choose a condition to add		
Product attribute combination		
Products subselection		
Conditions combination		
Cart Attribute		
Subtotal		
Total Items Quantity		
Total Weight		
Payment Method		
Shipping Method		
Shipping Postcode		
Shipping Region		
Shipping State/Province		
Shipping Country		

Product Attribute Combination

3. Click the **Add (a)** button at the beginning of the next line.

Apply the rule only if the following conditions are met (leave blank for all products)
If <u>ALL</u> of these conditions are <u>TRUE</u> :
If an item is FOUND in the cart with ALL of these conditions true: 😡
•

If an Item is FOUND

4. In the list under Product Attribute, click **Category**.

ALL of these conditions are TRUE :	
If an item is FOUND in the cart with ALL of	these conditions true: ⊗
Please choose a condition to add •	
Please choose a condition to add Conditions Combination	
Cart Item Attribute Price in cart	
Quantity in cart	
Row total in cart	
Product Attribute	
Accessories Type	
Attribute Set	
Category Gender	
Home & Decor Type	
Jewelry Type	
Name	
Necklace Length	
Occasion	
Price	
SKU	
Shoe type	
Special Price	

Choose Condition to Add

a. Click the <u>...</u> "more" link to display additional options.

Apply the rule only if the following conditions are met (leave blank for all products)						
If ALL of these conditions are TRUE : If an item is FOUND in the cart with ALL of these conditions true:						
Category <u>is</u> 📀						
Θ						
Category IS						

b. Click the **Chooser** button to display the available categories. Then in the category tree, select the checkbox of each category that you want to include.

Category is 19		
Default Category ()	
🔲 🧫 🗔 Men (70)		
Accessories (6)	2	
👛 🛄 📄 Eyewear (5)		
Jewelry (7)		
Bags & Lugg	ace (10)	
e 🔤 🗐 Home & Decor		
🗉 🔄 🖾 Sale (9)		
UIP (6)		
Gift Card (3)		
e Cit Private Sales Root	(286)	
🛛 🔛 🖂 Women (112)		
@ 🔁 🗐 Men (101)		
. Shoes (73)		
E Staging (0)		

Category Tree

c. Click the **Select** 📀 button at the end of the line to add the categories to the condition.



Category Condition

5. Click the Add
 button at the beginning of the next line, and do the following:

- a. In the list under Product Attribute, select **Price**.
- **a.** Click the first underlined parameter, <u>IS</u>. Then in the list, select "equals or greater than."

LL of the	se conditions are <u>TRUE</u> :	
If an item	is FOUND in the cart with ALL	of these conditions true: 😣
Categ	ory <u>is 19</u> 🛞	
Price	is 🔻	′ <u> ⊗</u>
۲	is is not	
۲	equals or greater than equals or less than	
	greater than less than contains does not contain	

Price Equals or Greater Than

b. Click the <u>...</u> "more" link to display the price field. Then, enter the amount that the price 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 ALL of these conditions are TRUE :
If an item is FOUND in the cart with ALL of these conditions true: 🔞
Category is 19 😣
Price is 200 📀
•
•

Enter the Price to Complete the Condition

6. Click the Save and Continue Edit button.

Step 3: Define the Actions

1. In the panel on the left, select **Actions**. Then, do the following:

Apply	Percent of product price discount	۲
Discount Amount *	25	
Maximum Qty Discount is Applied To	0	
Discount Qty Step (Buy X)	0	
Apply to Shipping Amount	No	•
Free Shipping	No	۲
Stop Further Rules Processing	Yes	٣
Add Reward Points		

Actions

- a. Set Apply to "Percent of product price discount."
- **b.** Enter the **Discount Amount**. For example, enter 25 for a twenty-five percent discount.

- **c.** If you want to prevent the purchase from qualifying for additional promotions, set **Stop Further Rules Processing** to "Yes."
- **2.** Click the **Save and Continue Edit** button. Then, complete the rule as needed.



CHAPTER 24: Shopping Tools

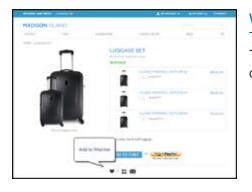
Your store includes a set of shopping tools that create opportunities for your customers to interact with your store, and to share the experience with friends.

Topics in this chapter :

- Wishlists
- Compare Products
- Recently Viewed / Compared Products
- Product Reviews
- Tags
- Polls
- Email a Friend
- Gift Options

Additional Resources Customer Engagement The 3 Components of Building eCommerce Customer Loyalty

Customer Engagement



Wishlist

The Wishlist block displays the items from the customer's wishlist.



Compare Products

The Compare Products block lets your customers quickly compare the features of one product with another.



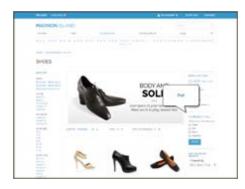
Product Reviews

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



Tags

Tags help customers organize and remember the products that they have seen, offer quick navigation, and help search engines index your store.



Polls

The Poll block displays a series of polls or surveys that you can use to learn more about your customers.

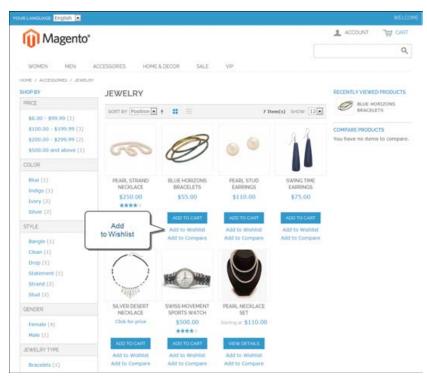


Email a Friend

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

Wishlists

A wishlist is a list of products that registered customers can share with friends or transfer to their shopping carts at a later date. When wishlists are enabled, the Add to Wishlist link appears on the category and product pages of your store. Depending on the theme, it might be a text link or a graphic image.



Add to Wishlist Links on Category Page

Wishlist Workflow

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

Each wishlist can be maintained in the customer's account dashboard, where it can be updated, and used to add products to the shopping cart. Wishlists can be set to public or private, and shared with friends. Items can be transferred between the wishlist and shopping cart by the customer or from the Admin. When a product with multiple options is added to a wishlist, any options that have been selected by the customer are included in the wishlist item description. For example, if the customer adds the same pair of shoes, but in three different colors, each pair appears as a separate wishlist item. On the other hand, if the customer adds the same product to the wishlist multiple times, the product appears in the wishlist only once, but with an updated quantity that reflects the number of times the product was added. Customers can update their wishlists from their account dashboard. Merchants can also update a customer's wishlist from the Admin.

Updating Wishlists

Customers can manage their wishlist from the customer account dashboard. Store administrators can manage customer wishlists from the Admin.

To update the wishlist from "My Account:"

- 1. From the customer account dashboard, in the panel on the left, click Wishlists.
- 2. To view the current options for an item, point to View Details.
- 3. To update the selection of product options, click Edit.
- 4. On the product page, update the quantity and selected options as needed.
- 5. When complete, click **Update Wishlist**.

If the options don't appear in the wishlist, return to the product page to make sure that they are selected.

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MY STORE CREDITS					
GIFT CARDS					

Customer Dashboard with Wishlist

To update wishlist items from the Admin:

- 1. On the Admin menu, select **Customers > Manage Customers**.
- 2. Find the customer in the list, and click to open the record.

- 3. In the Customer Information panel on the left, click Wishlist.
- **4.** Find the item to be edited in the list. Any options selected for the product appear below the product name. To edit the product options, do one of the following:
 - Select the checkbox for the item. Then, set the **Action** control to "Configure" and click **Submit**.
 - Click the **Configure** link.
- 5. On the product page, update the **Quantity** and selected options as needed.
- 6. When complete, click Update Wishlist.

Wishlist Reports

A customer Wishlist report includes the following information for each wishlist the customer has created:

- The date when a product was added
- The customer name
- The wishlist name and status (public or private)
- The product name and SKU
- Customer comments
- Quantity of the product in the Wishlist, quantity currently available in the store, and the difference between these two values.

You can choose to see a report for the entire website or for an individual store view. The scope is selected in the Show Report For field. The report can be exported to .csv or Excel .xml format.

To generate a wishlist report:

On the Admin menu, select Reports > Customers > Customers Wishlist.

Compare Products

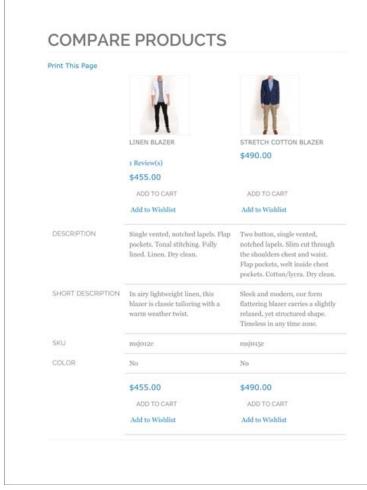
The Compare Products block usually appears in the far right column, or sidebar of the category page, and can be used to generate a detailed, side-by-side comparison of two or more products. You can customize the report to include additional attributes or remove ones that you don't want to include. Depending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

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Compare Products

To compare products:

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



Compare Products Report

Recently Viewed/Compared Products

The Recently Viewed and Recently Compared blocks usually appear in the right sidebar of a catalog page. The number of products listed in each block can be configured for each website, store, or store view.

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5/2E	VEW DETAILS	VEW DEFAULT:	VEWDEXALS			
XS (Z)	Add to Compare	Add to Wehlet Add to Compare	Add to Wishint Add to Compare			

Recently Viewed

To configure Recently Viewed/Compared Products:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Recently Viewed/Compared Products** section. Then, do the following:

Recently Viewed/Compared Products					
Show for Current	Website	[WEBSITE]			
Default Recently Viewed Products Count	4	[STORE VIEW]			
Default Recently Compared Products Count	4	[STORE VIEW]			

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, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Show for Current	Website	Limits the products shown to the current website. Options include: Website Store Store View
Default Recently Viewed Products Count	Store View	Determines the maximum number of recently viewed products that appear in the list.
Default Recently Compared Products Count	Store View	Determines the maximum number of recntly compared products that appear in the list.

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.

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			J	Charles	TO CART OR- CARSEN Server Server Server Server	* Regared Halts

Add Your Review

Configuring Product Reviews

The configuration determines whether customers must open an account with your store to be write a product review, or can submit a review as a guest. Requiring reviewers to open an account with your store can improve the quality of reviews by preventing anonymous submissions.

To configure product reviews:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Catalog, select **Catalog**.
- 3. Click to expand the **Product Reviews** section.
- 4. Set Allow Guests to Write Reviews according to your preference.

Product Reviews			٥
Allow Guests to Write Reviews	Yes		ſE]
		Product Reviews	

5. When complete, click the **Save Config** button.

Writing Product Reviews

Depending on your configuration, either guests or registered customers can write reviews for any product in your catalog. To write a review from the product page, click the "Add Your Review" link. For products that haven't yet been reviewed, the link says, "Be the first to review this product."

The number of stars indicates the satisfaction rating. Visitors can click the link to read the reviews and write their own. As an incentive, customers can receive reward points for submitting a review.

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PRCE	0	0	0	0	0
VALLE	0	.0	0	0	0
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SUHHANY O	r YOUR REVI	ov *			
www.tsvou	кнольне	1			

Write a Product Review

Moderating Reviews

When a review is submitted, it is sent to the Admin for moderation. When approved, the review is published in your store.

To edit and approve customer reviews:

 On the Admin menu, select Catalog > Reviews and Ratings > Customer Reviews > Pending Reviews.

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.0	1	5 8Aay 2 12:18	8, 2013 DE AM	Approved	San a Happy	man S	This is a great camera for segment. It's dura.	Man Watsite Madeon Island English	Customer	Madeon LX2208	hde001	Lat

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."

Product	MCLEMENT, HEL	Net in							
Posted By	Jam Sor Jamm		100						
Dummary Rating	*****								
Detailed Rating *	Price	1 star	2 stars	3 stars	4 stars	S stars			
	Value								
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4. When complete, click the **Save Review** button.

Custom Ratings

By default, customer can rate the quality, price, and value of a product. In addition, you can add your own custom ratings that relate to your products and customers. The average rating for each product appears in catalog lists and on the product page.

Magento Admin Panel	Global Record Search	Lapped in an advent (Thursday, May 1, 2014) 20, Manuals Callin Free (Link)
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Manage Ratings

To create your own ratings:

- 1. On the Admin menu, select Catalog > Reviews and Ratings > Manage Ratings.
- 2. In the upper-right corner, click the **Add New Rating** button.
- **3.** In the Rating Title section, enter the **Default Value** for the new rating. Then, enter the translation for each language supported by your store.

Rating Title		
Default Value *		
English		
French		
German		
	Datin a Title	

- Rating Title
- **4.** In the Rating Visibility section, set **Visibility In** to the store view where the rating will be used. (Hold down the Ctrl key to select multiple options.)
- 5. In the **Sort Order** field, enter a number to determine the sequence that this rating appears in the list of ratings.

Rating Visibility			
Visible In	Main Website Madison Island English French German	Ø	
Sort Order			

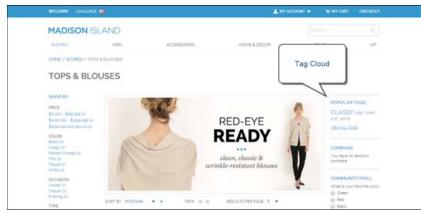
Rating Visibility

6. When complete, click the **Save Rating** button.

Tags

Tags are one-word descriptors that are used as keywords for your catalog. Tags can be assigned to products by registered customers who are logged in, and also by guests. Tags help customers organize and remember the products that they have seen, offer quick navigation, and help search engines index your store. The tags that customers assign to a product appear on the Customers Tagged Product tab of the product record. The detail includes the tag, the customer name, and email address.

A tag cloud typically appears in the Popular tags block in the right sidebar of catalog pages. The size of the text indicates the popularity of the tag. Each product page has an "Tag this Product" section at the bottom of the page, where shoppers can enter their own tags. As an incentive, customers can earn reward points for tagging a product.



Popular Tags

To add a tag from the store:

1. From any product page, scroll down to the **Tag this Product** section.

AG THIS PRODUCT	
Submit a new in.	tag now and earn 1 Reward points once the tag is approved. Learn more Applies only to registered customers, may vary when logged
dd A Tag	ADD TAGS

Tag this Product

- 2. In the Add a Tag text box, type the tag you want to associate with the product.
 - To enter multiple tags, separate each with a blank space.
 - To enter a phrase, enclose the text in single quotes.
- **3.** Click the **Add Tags** button.

The tag will be submitted for review and published on the site when approved.

Products Tagged by Administrators

There's no reason to wait for customers to tag products. The store administrator can apply new tags to products, and reuse existing tags.

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8	47	5 Ellis Flat	Ellis Flat	Configurable Product	Shoes	shw005		\$250.00	Catalog, Search	Enabled

Products Tagged by Administrators

To add a new tag:

- 1. On the Admin menu, select **Catalog >Tags > All Tags**.
- 2. In the upper-right corner, click the Add New Tag button. Then, do the following:
 - a. Enter the **Tag Name**.
 - **b.** Set **Status** to "Approved."
 - **c.** In the **Base Popularity** field, enter a numeric value to assign a weight to the tag. The number assigns a base value to the tag and increases its size in the tag cloud.
- 3. When complete, click the **Save Tag** button.

To apply an existing tag to specific products:

- 1. In the Manage Tags list, click to open the tag.
- 2. Click to expand the Products Tagged by Administrators section. Then, do the following:
 - a. Click the **Reset Filter** button to display all product records.
 - **b.** Select the checkbox of each product that you want to tag.
- 3. When complete, click the **Save Tag** button.

The products now appear in the list of Products Tagged by Administrators.

Moderating Tags

After a customer submits a product tag, an administrator must approve the tag before it becomes visible in the store. After a tag has been approved, it can be used for other products without further approval.

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Changing the Status of Pending Tags

The remaining sections give you a snapshot of the tag activity, including which customers have used the tag, and products tagged by the store administrator and customers.

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*sqe	1 of 1 pages View 20 • per page Total 1 record	a found		Reset Filter Seventh
10	FirstRame	Last Name	Product Name	Product SKill
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Customers Submitted this Tag

You can jump to a specific customer or product by clicking its row in the list.

age 1 of 1 pages View 20 • per page Total 1 records found	Renet Filler Search
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	From:
	To:
406 Linen Bazer	1 ma@12c

Products Tagged by Customers

To approve multiple tags:

- On the Admin menu, select Catalog > Tags > Pending Tags. Then in the list, click to open a pending tag.
- 2. In the list, select the checkbox of each tag that you want to approve.
- 3. Set the Actions control to "Change Status." Then, set the Status control to "Approved."
- **4.** When complete, click the **Submit** button.

To manage a single tag:

1. On the Admin menu, select **Catalog >Tags > Pending Tags**. Then in the list, click to open a pending tag.

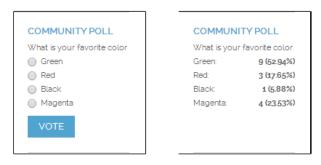
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Editing a Tag

- 2. If necessary, you can edit the text as needed. Then, do one of the following:
 - To approve and publish the pending tag, set **Status** to "Approved."
 - To reject the tag, set **Status** to "Disapproved."
- 3. When complete, click the **Save Tag** button.

Polls

Polls make it easy to learn about your customers' opinions and preferences. The poll occupies a small amount of space and is usually placed in the right sidebar of a catalog page. Poll results appear immediately after a response is submitted. If you create multiple polls, a new poll appears each time the page is refreshed.



Original Poll and Results

To create a poll:

- 1. On the Admin menu, select **CMS > Polls**.
- 2. In the upper-right corner of the Poll Manager, click the Add New Poll button.
- **3.** In the Poll Information section, do the following:

information		
Poll Question *		
Status	Open	•
Visible in *	Main Website Madison Island English French German Private Sales Viebsite Private Sales Store Private Sales View	٢

Poll Information

- a. Enter the **Poll Question**.
- **b.** By default, **Status** is set to "Open." If you later want to remove the poll from your store, set **Status** to "Closed."
- c. Set Visible In to the store view where you want the poll to appear.
- 4. In the panel on the left, select **Poll Answers**. Then, for each answer, do the following:
 - a. Click the Add New Answer button. Then, do the following:

Assigned Answers		
Answer Title: *		
Votes Count *	0	
	O Delete	

Assigned Answers

- a. In the Answer Title field, enter the answer as you want it to appear in the poll.
- **b.** To weight an answer, enter a number in the **Votes Count** field. The number will increment each time a customer chooses the answer.
- 5. Click the **Save Poll** button to save your poll.

To prevent multiple voting:

You can protect the poll results by preventing people from voting multiple times from the same computer.

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under General, select **Web**.
- 3. Click to expand the Polls section, and set Disallow Voting in a Poll Multiple Times from Same IP Address to "Yes."

Polls				٥
Disallow Voting in a Poll Multiple Times from Same IP-address	Yes	¥	[STORE VIEW]	

Disallow Voting Multiple Times

4. When complete, click the **Save Config** button.

To edit a poll:

- **1.** From the Poll Manager list, click to open the poll in edit mode. Then, make the necessary changes.
 - To close the poll so that it no longer appears in the store, set Status to "Closed."
 - To see the vote count for each answer, click **Poll Answers** in the panel on the left.
- 2. When complete, click the **Save Poll** button.

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Poll Answer Count

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 automated message that is sent from your store is referred to as transactional email. 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.

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DESCRIPTION ADDITIONAL INFORMATION	ROTEWS	

Email a Friend

To configure email to a friend:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select Email to a Friend.
- 3. Click to expand the **Email Templates** section. Then, do the following:
 - a. Set Enabled to "Yes."
 - **b.** Set **Select Email Template** to the template you want to use as the basis of the messages.
 - **c.** If you want to require that only registered customers can send email to friends, set **Allow for Guest**s to "No."
 - **d.** In the **Max Recipients** field, enter the maximum number of friends who can be on the distribution list for a single message.
 - **e.** In the **Max Products Sent in One 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.

	<u> </u>
Yes	[STORE VIEW]
Send product to a friend (Default Template from 💌	[STORE VIEW]
No	[STORE VIEW]
5	[STORE VIEW]
5	[STORE VIEW]
Cookie (unsafe)	[STORE VIEW]
	Send product to a friend (Default Template from No 5 5 5

Email Templates

4. When complete, click the **Save Config** button.

To send email to a friend:

- **1.** On a catalog page, click the **Email a Friend** link. When prompted, either log into your customer account or register to open an account.
- 2. Complete the Message and enter the recipient Name and Email Address.

To send the message to more than one person, click the **Add Another Recipient** link and complete the information for each person.

3. When ready to send the message, click the **Send Email** button.

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Email to a Friend Form

Gift Options

At checkout, customers are presented with the available gift options during the Shipping Method step of the process. If the customer chooses to add gift options, two groups of checkboxes appear: Gift Options for Entire Order and Gift Options for Individual Items.

The Gift Options configuration determines if customers have the option to add a gift message for the complete order, and for individual items. The gift options must be configured first for the website, and can then be overridden at the product level.

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Sorry, no quotes are available for this order at this time. DO YOU HAVE ANY GIFT ITEMS IN YOUR ORDER?		SHIPPING ADDRESS CHANGE Jane Doe stigge Jefferson Block
Add gift opbons GIFT OPTIONS FOR THE ENTIRE ORDER.		Culter City, California, 90232 United States T: 999 999-9999
Add gift options for the Entire Order GIFT OPTIONS FOR INDIVIDUAL ITEMS		SHIPPING METHOD
		PAVMENT METHOD

Gift Options During Checkout

To enable gift options:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Sales**.
- **2.** Click to expand the **Gift Options** section. Then, set the following options according to your preference:
 - Allow Gift Messages on Order Level
 - Allow Gift Messages for Order Items

Gift Options		٥
Allow Gift Messages on Order Level	Yes	(WEBSITE)
Allow Gift Messages for Order Items	Yes	[WEBSITE]

Gift Options Configuration

3. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Allow Gift Messages on Order Level	Website	Specify whether a gift message can be added for the entire order.
Allow Gift Messages on Order Items	Website	Specify whether a gift message can be added for an individual order item.

Notes	



CHAPTER 25: Newsletters

Publishing a regular newsletter is considered to be one of the most powerful and affordable marketing tools available. Magento Community Edition gives store administrators the ability to publish and distribute newsletters to customers who have registered to receive them, plus all the tools necessary to Promote your newsletter, build and manage your list of subscribers, develop content, maintain an archive of back issues, and drive traffic to your store.

Topics in this chapter:

- Newsletter Setup
- Newsletter Templates
- Newsletter Queue

Newsletter Configuration

The first step in creating newsletters is to configure the newsletter settings for your site. You can require customers to confirm the registration by clicking a confirmation link sent by email. This technique is called double opt-in, because customers must confirm twice that they want to receive a newsletter. This method reduces the number of customers that might otherwise consider your newsletter as spam.

To configure subscription options:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select Newsletter.
- 3. Click to expand the Subscription Options section. Then, do the following:
 - **a.** Confirm the email templates and senders of the following email messages sent to subscribers:
 - Success email
 - Confirmation email
 - Unsubscription email
 - **b.** To require people to double-opt in to confirm their subscription, set **Need to Confirm** to "Yes."
 - **c.** To allow people who do not have an account with your store to subscribe to the newsletter, set **Allow Guest Subscriptions** to "Yes."
 - d. When complete, click the **Save Config** button.

Subscription Options		۹
Success Email Template	Newsletter subscription success (Default Tem 🔻	[STORE VIEW]
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Unsubscription Email Sender	Customer Support	[STORE VIEW]
Unsubscription Email Template	Newsletter unsubscription success (Default Te 🔻	[STORE VIEW]
Success Email Sender	General Contact 🔹	[STORE VIEW]
Confirmation Email Template	Newsletter subscription confirmation (Default 1 *	[STORE VIEW]
Need to Confirm	No	[STORE VIEW]
Confirmation Email Sender	Customer Support	ISTORE VIEWI
Commander Enhan Gender		[orone men]
Allow Guest Subscription	Yes 🔻	[STORE VIEW]
Need to Confirm Confirmation Email Sender	No Customer Support	[STORE VIEW] [STORE VIEW]

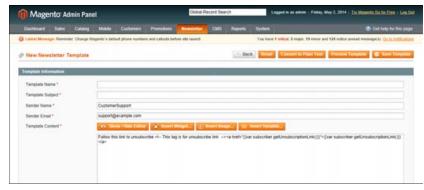
Subscription Options

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Success Email Template	Store View	Determines the email template used for the notification sent to those who successfully subscribe to a newsletter. Default template: Newsletter subscription success
Unsubscription Email Sender	Store View	Identifies the store contact that appears as the sender of email sent to those who request to end their newsletter subscription.
Unsubscription Email Template	Store View	Determines the email template used for the notification sent to those who request to end their newsletter subscription. Default template: Newsletter unsubscription success
Success Email Sender	Store View	Identifies the store contact that appears as the sender of email sent to those who successfully subscribe to a newsletter.
Confirmation Email Template	Store View	Determines the email template used for the notification sent to confirm a request to subscribe to a newsletter. Default template: Newsletter subscription confirmation
Need to Confirm	Store View	Determines if subscription requests must be confirmed. This double-opt-in method is a validation measure that prevents people from being subscribed without their consent. Options include: Yes / No
Confirmation Email Sender	Store View	Identifies the store contact that appears as the sender of email sent to confirm a subscription request.
Allow Guest Subscription	Store View	Determines if unregistered guests can subscribe to a newsletter. Options include: Yes / No

Newsletter Templates

Before sending a newsletter, create a newsletter template. You can create and save as many of these as required for any situation, from an annual holiday newsletter to a weekly product update.



Newsletter Template

To create a newsletter template:

- 1. On the Admin menu, select **Newsletter > Newsletter Templates**. The page lists the available newsletter templates. You can edit an existing template or create a new one.
- 2. To add a new template, click the **Add New Template** button. Then, do the following:
 - **a.** In the **Template Name** field, specify a unique and indicative name for this template. This value is not visible for customers.
 - **b.** In the **Template Subject** field, specify the subject of the email to be sent to your customers.
 - **c.** In the **Sender Name** and **Sender Email** fields, specify the name and email of the sender of the email to be sent to your customers.
 - **d.** In the **Template Content** field, use the WYSIWYG editor to compose the body of the email. Note that this field is pre-filled with tags showing an unsubscribe link in the email. We recommend that you do not remove this link so that all emails that are sent enable your customers to unsubscribe from the newsletter.
 - **e.** Click **Preview Template**, to display the content with the formatting as it will be viewed by your subscribers.
- 3. When complete, click the **Save Template** button.

After you have saved a template, a Save As button appears when you edit this template. You can use the Save As button, so you can make changes and save it as a new template, without affecting the original. This can save you time because you will not need to re-enter all the template information in order to create a new template. If you already have an existing template that is similar to the new template, simply edit the fields that you require, and then use the Save As button to create a new template.

Newsletter Queue

A newsletter that has many recipients must be sent in stages. The process of sending the newsletter is managed by a queue. After you start the queue, Magento sends the emails in packs. To ensure delivery of your newsletters, it is recommended that you integrate your Magento installation with a third-party newsletter provider. These services are "white listed" by email service providers. Look for newsletter providers in Magento Connect.

To send your newsletter using a queue:

- 1. On the Admin menu, select **Newsletter > Newsletter Templates**.
- 2. Set the Actions control to the relevant template. Then, select Queue Newsletter.
- 3. In the Queue Date Start field, specify when the newsletter will start being sent.
- **4.** In the **Subscribers From** field, select one or more store views whose customers this newsletter will be sent to.
- **5.** Review the template and parameters and then click the **Save Newsletter** button to schedule sending the newsletter.

Notes	



CHAPTER 26: Sales Channels

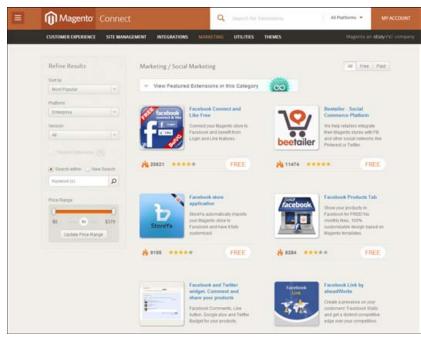
Publishing your catalog through multiple channels is an effective way to widen your distribution without much effort. You can start by syndicating your content with RSS feeds, and then expand by sending your catalog data to shopping aggregators and marketplaces.

Topics in this chapter:

- Google Shopping
- RSS Feeds
- Social Marketing

Social Marketing

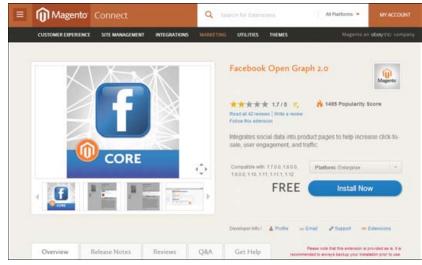
There are many social marketing extensions that can be added to your store. To learn more, see: Magento Connect.



Social Marketing Extensions

Facebook Open Graph

The Facebook Open Graph 2.0 extension is a tool developers can use to add custom social networking buttons to your store. The extension uses the new Facebook Open Graph 2.0 protocol.



Facebook Open Graph

When the Facebook Open Graph 2.0 extension is successfully installed and all configuration is complete, the Facebook buttons appear on each product page in the store, along with the Facebook blocks that provide information about other Facebook users and friends who have clicked the social buttons. The information provided in the blocks depends on the customer who is logged in to Facebook and whether friends have performed actions with your app, such as clicked a social button.

Process Overview

Step 1: Download and install the extension Step 2: Create an application on the Facebook Developer site

Step 3: Configure Magento

Step 1: Download and Install the Extension

The Facebook Open Graph 2.0 extension is free of charge and can be downloaded from Magento Connect. Copy the **Extension Key** to the clipboard.

- 1. On the Admin menu, select System > Magento Connect > Magento Connect Manager.
- 2. When prompted, enter your Admin credentials, and click the Log In button.
- 3. Paste the **Extension Key**, and click the **Install** button.

Step 2: Create Application on Facebook Developer Site

The current implementation of the Facebook Open Graph 2.0 extension requires an application to be created manually on the Facebook Developers site.

- 1. Navigate to: https://developers.facebook.com/
- 2. In the main menu, click **Apps**.
- 3. Click **Create New Application** and perform all of the steps of the app creation wizard.

The App Namespace value that you entered will be used in the Magento configuration.

4. In the left column, select **Settings > Basic**. Under the "Select how your app integrates with Facebook" heading, select **Website**. Then in the **Site URL** field, enter your store address.

Important! Your website and store should have one domain name.

a. For Action Types in the Advanced settings in the Graph API URL field enter own, want or other action you want to be associated with a social networking button on your product pages. This title is for internal use.

The "dislike" action is not supported by Facebook Open Graph 2.0.

- **b.** The Object Type you create should have the following Object Properties:
 - URL (page URL)
 - Title (product title)
 - Image (image URL)
 - Description (product description)
 - Price

By default, a new Object Type has only the first four properties. To add the Price property, use the Add Another Property button on the Object Type page.

Step 3: Configure Magento

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Social, select Facebook.

If the extension is installed, the Social tab appears in the Configuration panel.

- **3.** Set **Current Configuration Scope** to your website.
- **4**. In the Facebook Config section, do the following:

- a. To display Facebook buttons in the store, set **Enable Facebook on Frontend** to "Yes."
- **b.** Enter the **App Namespace** value of your application. You can find it in the Basic Settings section of your app on the Facebook Developers site.
- **c.** Specify the **App ID** and **App Secret** values of your application. You can find them in the Basic Settings section of your app on the Facebook Developers site.
- **d.** Enter the **Open Graph Type** value of your **Object Type**. To find it on the Facebook Developers site, open the settings of your application, navigate to Open Graph > Dashboard, click your object type, and expand the Advanced settings.

On the page header, the system will display the Apps > %Your Facebook Application Name% > Open Graph > Object Type: %Object name%.

e. To add and configure a social networking button, click **Add Action Button** and complete the setup for each button. The action settings can be different for each store view.

Action	In the Action column, specify the internal button action title, for example, own or want. This value should correspond to the value you have specified in the Graph API URL field on the Facebook Developers site. The Graph API URL field is available in the Advanced section of the Action Type settings.
Button Title	In the Button Title column, specify the name of the social networking button as you want it to appear in the frontend.
Enable Friend Box	In the Enable Friend Box column decide if you want to display in the frontend the related Facebook block, which contains the count and the pictures of friends.
Count Friend Box	In the Count in Friend Box column, set the maximum number of friends that can be displayed in the related Facebook block. By default, it is set to 3. If you set zero value (0) or leave the field empty, then the default value is applied.

5. When complete, click **Save Config** button.

The social network buttons you have created and the corresponding Facebook blocks now appear on the product pages of your store.

Setting Up 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 and be notified of new products and promotions. RSS Feeds can also be used to publish your product information to shopping aggregation sites, and can also be included in newsletters.



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

The software that is used to read an RSS feed is called a feed reader, and allows people to subscribe to headlines, blogs, podcasts, and much more. Google Reader is one of the many feed readers which are available online for free.

To set up RSS feeds for your store:

- 1. From the Admin menu, select **System > Configuration**.
- **2.** In the upper-right corner, set **Current Configuration Scope** to the store view where you want the feeds to be available.
- 3. In the panel on the left, under Catalog, select **RSS Feeds**.

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RSS Feed Configuration

- **4.** In the Rss Config section, set **Enable RSS** to "Enable." Then, in each section below, set the feeds that you want to activate to "Enable."
 - a. In the Wishlist section, set Enable RSS to "Enable."
 - b. In the Catalog section, set any, or all, of the following feeds to "Enable."

- New Products
- Special Products
- Coupons/Discounts
- Tags Products
- Top Level Category
- Top Level Category

Catalog		٩
New Products	Disable	▼ [STORE VIEW]
Special Products	Disable	[STORE VIEW]
Coupons/Discounts	Disable	[STORE VIEW]
Tags Products	Disable	[STORE VIEW]
Top Level Category	Disable	[STORE VIEW]

Catalog

- c. In the Order section, set Customer Order Status Notification to "Enable."
- 5. When complete, click the **Save Config** button.

Types of RSS Feeds

RSS FEED	DESCRIPTION
Wishlist	When enabled, an RSS feed link appears at the top of customer wishlist pages. Additionally, the wishlist sharing page includes a checkbox that lets you include a link to the feed from shared wishlists.
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.
Tags Products	Publishes notification of new product tags.
Top Level Category	Publishes notification of any change to the top-level category structure of your catalog, which is reflected in the main menu.
Customer Order Status	Gives customers the ability to track their order status by RSS feed. When enabled, an RSS feed link appears on the order.

Notes	

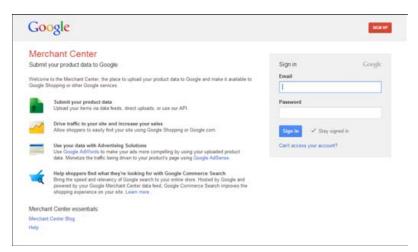


CHAPTER 27: Google Tools

Your store includes a number of tools to help optimize your content, analyze your traffic, and connect your catalog to shopping aggregators and marketplaces.

Topics in this chapter:

- Google Merchant Center
- Google Sitemap
- Google Universal Analytics
- Google "Classic" Analytics



Google Merchant Center Login

Google Merchant Center

Google Merchant Center helps you manage Google's shopping tools and services from a single dashboard. In addition to the following services, you can also link Google Analytics to your Merchant Center account.

Google Shopping

Google Shopping is a commercial service that helps shoppers find products on Google, compare products, and connect with merchants.

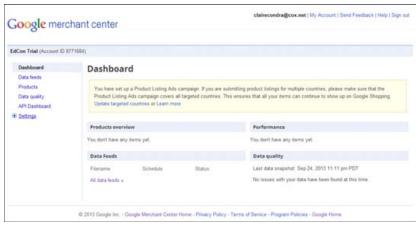
Product Listing Ads

Your product listings can include rich information, such as product image, price, and merchant name. Whenever a user enters a search query on Google.com that is relevant to an item you are trying to sell, Google will automatically show the most relevant products along with the associated image, price, and product name.

Process Overview: Step 1: Open a Google Merchant Account Step 2: Verify Your Website URL Step 3: Claim Your Website URL

Step 1: Open a Google Merchant Account

- 1. Visit the Google Merchant Center, and do one of the following:
 - If you have a Google account, enter your **Email address** and **password**, and click the **Sign In** button.
 - Click the Sign Up button, and follow the instructions to create an account.



Google Merchant Center Dashboard

- 2. In the panel on the left, click to expand **Settings**, and select **General**.
- 3. Enter your Store name and Description.
- **4.** Enter the full **Website URL** for your store. Depending on your domain, the URL might be formatted as one of the following:

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

At this time, your Website URL is unclaimed and unverified.

G <mark>oogle</mark> mercha	janedoe@mystore.com My Account Send Feedback Help Sign
My Store (Account ID: ******	
Dashboard Data feeds Products	General settings Store name (Required) - Please do not include promotional text. Learn more My Store
Data quality API Dashboard	Description
General FTP	
Google Cloud Storage	Website URL
Tax and shipping AdWords Trusted Stores Users	http://mystere.com/

Website URL Unverified - Unclaimed

5. Complete the remaining General settings information, and **Save Changes**.

Step 2: Verify Your Website URL

In this step, you will use Google Webmaster Tools to verify that you have the right to upload product listings from your store.

- 1. On a new browser tab, go to Google Webmaster Tools. Then, do the following:
 - a. Click the **Add a Site** button. When prompted, enter the URL of your store, and click **Continue**.
 - **b.** When prompted to verify that you are the owner of the site, click the **Alternate methods** tab.
 - **c.** Select the **HTML tag** method, and press **Ctrl + C** to copy the meta tag code to the clipboard.

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Webmaster Tools		Help -	
Verify your ownership of t	ttp://mystore.gostorego.com/. Learn more.		
 HTML tag Add a meta tag to yo 	ir site's home page.		
1. Copy the meta section.	ag below, and paste it into your site's home page. It she	ould go in the <head> section, before the first <body></body></head>	
<meta< td=""><td>ame="google-site-verification" content="b6jcob4Cl</td><td>KFIBMg-W7ZXG2Kw5JLxPEpEz0zwlaOUu_4" /></td><td></td></meta<>	ame="google-site-verification" content="b6jcob4Cl	KFIBMg-W7ZXG2Kw5JLxPEpEz0zwlaOUu_4" />	
 Show me an ex Click Verify bell 			
To stay verified, do	it remove the meta tag, even after verification succeeds	k.	
 Domain name prov Sign in to your domain 			
Google Analytics Use your Google Analytics	lytics account.		
Google Tag Manag Use your Google Tag			
VERFY Not now			

HTML Meta Tag Code

- 1. Return to your store's Admin, and select **System > Configuration**.
- 2. In the panel on the left, under General, select **Design**. Then, do the following:
 - a. Click to expand the HTML Head section.
 - **b.** Scroll down to the **Miscellaneous Scripts** box and press **Ctrl + V** to paste the verification code from the clipboard.
 - c. When complete, click the **Save Config** button.

Favicon Icon	Allowed file types: ICO, PHG, GF, JPG, JPEG, APNG, SVG. Not all browsers support all these formats!	ISTORE VIEW]
Default Title	Magento Commerce	[STORE VIEW]
the Prefix		ISTORE VIEW
Title Suffix		prone view
Default Description	Default Description	DITORE VIEW
Delault Keywords	Magento, Varien, E-commerce	(TTORE VIEW)
	Site Verificat Code	
Defaut Robots Viscelaneous Scripts	Verificat	
	INDEX. FOLLOW	
Viscellaneous Scripts	INDEX. FOLLOW	

Paste Google Site Verification Code

3. Return to Google Webmaster Tools, and click the **Verify** button. When prompted, click **Continue**. Your site is now verified.

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Webmaster Tools				😝 di.gostorego.a	- 190	Help +	٥.
Site Dashboard Site Messapes • Gearch Appearance 0 • Search Traffic	New and important No new messages or recent critical is Current Status	wes Vew all					
Google Index	Crawl Errors	>>	Search Queries	>>	Sitem	aps	No Sher
Crawl Malware Additional Tools Labe	No data available (Why not?)		No data available. (Why rol?)		Wity a	vbrot a Stamap	,

Google Webmaster Tools - Site Verified

Step 3: Claim Your Website URL

In this final step, you will establish the connection between your site and your Google Merchant account.

1. Return to the Google Merchant Center. The General Settings now show that your site is verified, but not claimed.

Google mercha	janedoe@mystore.com My Account Send Feedback Help Sign o ant center
My Store (Account ID: ******	
Dashboard Data feeds Products	General settings Store name (Required) - Please do not include promotional text. Learn more My Store
Data quality API Dashboard	Description
E Settings General	
FTP Google Cloud Storage	Claim this URL
Tax and shipping	Website URL http://mystore.com
AdWords Trusted Stores	To use this site, claim the trian tri trian
Users	This site contains non-family-safe or adult products as defined by our policy. Learn more

Google Merchant Center- Claim this URL

2. Click the **Claim this URL** link. Your Website URL is now both verified and claimed.

G <mark>oogle</mark> mercha	janedoe@mystore.com My Account Send Feedback Help Sign o ant center
My Store (Account ID: ******	
Dashboard Data feeds Products	General settings Store name (Required) - Please do not include promotional text. Learn more My Store
Data quality API Dashboard	Description
General FTP	
Google Cloud Storage	Website URL
Tax and shipping AdWords Trusted Stores Users	http://mystore.com/ Image: the state of the

Website URL Verified and Claimed

Now that your site is verified, you can submit a sitemap to Google. You can also set up a Google Analytics account, and link it to your Merchant Center Dashboard.

Google Sitemap

Google Sitemap improves the way your store is indexed by their search engine, and is specifically designed to find pages which might otherwise be overlooked. As with the standard Magento sitemap, Google Sitemap is an index of all the pages on your site. However, unlike the Magento sitemap, the Google Sitemap is not visible to customers.

Process Overview:

Step 1: Remove any "robots.txt" Restrictions

Step 2: Generate the Sitemap

Step 3: Submit Your Sitemap to Google

Step 4: Restore Previous "robots.txt" Restrictions

Step 1: Remove any "robots.txt" Restrictions

When first setting up your Google Sitemap, you must provide full access for Google to index your site. If you have a robots.txt file, make sure that it includes the following instruction:

User-agent:* Disallow:

After your sitemap has been successfully submitted to Google, you can restore any instructions to exclude certain locations of your site. If you have not yet set up a robots.txt file, you can do so after you finish the sitemap.

Step 2: Generate the Sitemap

- 1. On the Admin menu, select **Catalog > Google Sitemap**.
- 2. In the upper-right corner, click the Add Sitemap button. Then, do the following:
 - a. In the Filename field, enter: "sitemap.xml"
 - **b.** Enter the path to a writable location on your server for the sitemap.
 - To put the sitemap in a folder, enter the path to the folder: /sitemaps
 - To put the sitemap at the base path of your store, enter a forward slash: /
 - c. Set Store View to the view where the sitemap will be used.

Sitemap	
Filename *	sitemap.xml
	A example: sitemap.xml
Date 4	
Path *	/
	▲ example: "sitemap/" or "/" for base path (path must be
	writeable)
Store View*	
Store view -	English 🔻 😡

Configure Google Sitemap

3. Click the **Save & Generate** button to create the sitemap.

The sitemap appears in the list, with a link to sitemap.xml file. From here, you can do the following:

- To view the sitemap, click the hyperlink in the **Link for Google** column. This is the link that you will later submit to Google.
- To update the sitemap, click the **Generate** link.

Step 3: Submit Your Sitemap to Google

- **1.** Go to **Google Webmaster Tools** and do one of the following:
 - Log in to your existing account.
 - Create a new account, and log in.
- 2. Click the **Add a Site** button.

Google		
Webmaster Tools		
Home All Messages	Sot: By site health Aprotectally	ADD A SITE
Preferences		Manage site -
Labs	Add a site	
Other Resources	Enter the URL of a site you'd like to manage	
	Example: www.google.com	
Help with	Continue Cancel	
Automatically adding sites	Annual Andre	Manage alter -
Site ventication		Toda
Reconsideration		
Site Health		
Help center		
Search help Go		
	# 2011 Google Inc Wetmanier Central - Terms at Service - Privacy Policy - Wetmanter Teals Help	

Add a Site

3. When prompted to enter your store address, enter the full URL of your store, such as: http://www.mystore.com

Then, click the **Continue** button.

- **4.** To verify that you are the owner of the site, click the **Alternate Methods** tab. Then, choose one of the following methods:
 - Add a DNS record to your domain's configuration
 - Add a meta tag to your site's home page

To verify your site with a meta tag, do the following:

- **a.** Open two tabs on your browser; one for Google Webmaster Central, and the other that is logged in to the Admin of your store.
- **b.** Follow the instructions on Webmaster Central to copy the full text of the Google site verification meta tag.
- **c.** On the Admin menu, select **System > Configuration**. In the Configuration panel on the left, under General, click **Design**.
- **d.** In the **HTML Head** section, scroll down to **Miscellaneous Scripts** and paste the site verification meta tag. Then, click the **Save Config** button.
- e. Return to Google Webmaster Central, and click Verify.

AdWords AdSense Analytics Apps	johndoe@mystore.com My Account Help Sign out
Google	
Webmaster Central	÷.
There are several ways to prove to Google that you own http://www.mystore.com/. S verification.) Recoverended method	elect the option that is easiest for you. (More information about she
Add a meta tag to your site's home page You can use this option if you are able to edit your site's HTML	
Instructions:	
1. Copy the meta tag below, and paste it into your site's home page. It should go in	the <head> section, before the first <body> section.</body></head>
<meta content="53HnD-46</td><td>EOuDbZsSfLuPy6e3HwqYJZrVBORKiEFBOM0" name="google-site-verification"/>	
Show me an example	
2. Click Varity below	
To stay verified, don't remove the meta tag, even after verification succeeds.	
Use your Google Analytics account	
You can use this option if your site already has a Google Analytics tracking code that Analytics account.	uses the asynchronous snippet. You must be an administrator on the
 Add a DNS record to your domain's configuration You can use this option if are able to sign in to your domain registrar or hosting provid 	fer and add a new DNS record
VEREFY Not now	

Google Site Verification

- 5. After your site is verified and appears in your Google dashboard, do the following:
 - **a.** Click the name of your store. Then, click the **Sitemaps** button.
 - **b**. In the upper-right corner, click the **Add/Test Sitemap** button.
- **6.** Return to your store Admin, and copy the path to your Google sitemap. If necessary, log back in and do the following:

- a. Go to Catalog > Google Sitemap.
- **b.** In the **Link for Google** column, right-click the link to your sitemap. Then on the context menu, click **Copy Shortcut**.
- **c.** Open a text editor and paste the link. Then, copy the part of the link that comes after the "dot com." It looks like this:

```
/media/s4d71280645299/sitemaps/sitemap.xml
```

7. Return to **Google Webmaster Tools** and paste the text into the box to complete the address of your sitemap. Then, click the **Submit Sitemap** button.

AdWords AdSense A	nalytica Appa	johndoe@mystore.com My Account Help Sign out
Google		
Webmaster Tool	s	2 + mystare.com -
Dashboard	Sitemaps	ADDITEST STEMP
Messages	Ety me (0) AB (2)	Add/Test Sitemap
Configuration	No sitemaps found for this site.	http://www.mystore.com/ sitemaps/sitemap.xml
+ Health		Test Stemap Science Steman Carcel
Traffic		
- Optimization		
Sitemaps		100 CO.
Remove URLs		Submit Sitemap
HTML Improvements Content Keywords		
Other Resources		
+ Labs		

Submit Google Sitemap

8. Make sure that the link to your sitemap is working correctly, and that your Google dashboard shows the number of pages indexed.

Step 4: Restore Previous "robots.txt" Restrictions

If you changed your robots.txt file to make it fully accessible, you can now restore the previous instructions to disallow access to certain areas of your site.

Google Sitemap Configuration

Your Google sitemap should be updated as frequently as the content on your site changes, which could be daily, weekly, or monthly. The configuration lets you set the frequency and priority for each type of content separately.

Step 1: Complete the Generation Settings

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Catalog, select **Google Sitemap**.
- 3. Click to expand the Generation Settings section. Then, do the following:
 - a. To activate Google Sitemap, set Enabled to "Yes."
 - **b.** Set **Start Time** to the hour, minute and second that you want the sitemap to be updated.
 - **c.** 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 notification if an error occurs during a sitemap update.
 - e. Set **Error Email Sender** to the store contact who appears as the sender of the error notification.
 - f. Set **Error Email Template** to the template used for the error notification.

Generation Settings		٥
Enabled	No	[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	Sitemap generate Warnings (Default Template fr	[WEBSITE]

Generation Settings

Step 2: Set the Frequency and Priority of Content Updates

- 1. Click to 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			٥
Frequency	Daily	[STORE VIEW]	
Priority	0.5	[STORE VIEW]	
	Valid values range: from 0.0 to 1.0.		

Categories Options

2. Click to expand the **Products Options** section. Then, complete the **Frequency** and **Priority** settings as needed.

roducts Options			
Frequency	Daily	[STORE VIEW]	
Priority	1	[STORE VIEW]	
	Valid values range: from 0.0 to 1.0.		

Products Options

 Click to expand the CMS Pages Options section. Then, complete the Frequency and Priority settings as needed.

_			
Frequency	Daily	[STORE VIEW]	
Priority	0.25	[STORE VIEW]	
	Valid values range: from 0.0 to 1.0.		

CMS Pages Options

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION		
GENERATION SETTINGS				
Enabled	Store View	Determines if Google Sitemap is available for the store. Options include: Yes / No		
Start Time	Store View	Specifies the hour, minute, and second of the day that the sitemap is updated.		
Frequency	Store View	Determines how often the sitemap is updated. Options include:		
		Daily		
		Weekly		
		Monthly		
Error Email Recipient	Store View	The email address of the person who receives notifiation if an error occurs during the sitemap update process. For multiple addresses, separate each with a comma.		
Error Email Sender	Website	Identifies the store contact that appears as the sender of the error notification. Options include: General Contact		
		Sales Representative		
		Customer Support		
		Custom Email 1		
		Custom Email 2		
Error Email Template	Website	Identifies the email template that is used for the error notification. Default template: Sitemap generate Warnings		
CATEGORIES OPTIONS				
Frequency	Store View	Determines how often sitemap categories are updated. Options include: Always Hourly Daily Weekly Monthly		

FIELD	SCOPE	DESCRIPTION
		Yearly
		Never
Priority	Store View	A value between 0.0 and 1.0 that determines the priority of category sitemap updates in relation to other content. Zero has the lowest priority.
PRODUCTS OPTIONS		
Frequency	Store View	Determines how often sitemap products are
		updated. Options include:
		Always
		Hourly Daily
		Weekly
		Monthly
		Yearly
		Never
Priority	Store View	A value between 0.0 and 1.0 that determines the priority of product sitemap updates in relation to other content. Zero has the lowest priority.
CMS PAGES OPTIONS		
Frequency	Store View	Determines how often sitemap CMS pages are updated. Options include:
		Always
		Hourly
		Daily
		Weekly
		Monthly
		Yearly
		Never
Priority	Store View	A value between 0.0 and 1.0 that determines the priority of CMS page sitemap updates in relation to other content. Zero has the lowest priority.

Field Descriptions (cont.)

Google Universal Analytics

Google Universal Analytics gives you the ability to define additional custom dimensions and metrics for tracking. Universal Analytics supports offline and mobile app interactions, and includes access to ongoing updates.

The Google Analytics section of the configuration supports two different account types:

- Universal Analytics
- Google Analytics

Because Google will soon retire their "classic" tracking codes, we encourage you to upgrade your existing Google Analytics account to Universal Analytics.

Process Overview: Step 1: Sign Up or Upgrade to Google Universal Analytics Step 2: Complete the Magento Configuration

Step 1: Sign Up or Upgrade to Google Universal Analytics

Do one of the following:

- Sign up for a new Google Universal Analytics account.
- Upgrade your classic Google Analytics account to Universal Analytics.

During the first part of the upgrade process, your existing account properties and tracking code are converted to the Universal Analytics format, but your data and settings are preserved. In the second part of the process, your tracking code is converted to the Universal Analytics format.

Before beginning the upgrade, visit the Universal Analytics Upgrade Center, and read the Upgrade Guide. Take note of the Important Considerations section at the bottom of the page.

Step 2: Complete the Magento Configuration

- 1. Return to your store, and log in to the Admin. Then on the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select Google API.
- 3. Click to expand the **Google Analytics** section, and do the following:
 - a. Set **Enable** to "Yes."
 - **b.** Set **Account type** to "Universal Analytics." Then, enter your Universal Analytics **Account Number**.
 - **c.** To anonymize part of your visitor's IP address before it is sent to Google, set **Enable IP Anonymization** to "Yes."

According to Google, anonymizing IP addresses can reduce the accuracy of geographic	
data in the Analytics report.	

Google Analytics				۵
Enable	No	•	[STORE VIEW]	
Туре	Universal Analytics A The tracking code to use.	•	[STORE VIEW]	
Account Number			[STORE VIEW]	
Enable IP anonymization	No	•	[STORE VIEW]	

Google Analytics

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable	Store View	Determines if Google Analytics is activated to analyze traffic patterns and customer activity in your store. Options include: Yes / No
Account type	Store View	Determines the Google tracking code that is used to monitor store activity and traffic. Options include:
		Universal Analytics
		Google Analytics
Account Number	Store View	Identifies the account number associated with your Universal Analytics account.
Enable IP anonymization	Store View	Protects the identity of visitors to your site by hiding the geographic portion of each IP address before the data is sent to Google. Options include: Yes / No
		According to Google, anonymizing IP addresses can reduce the accuracy of geographic data in the Analytics report.

Google "Classic" Analytics

The following instructions walk you through the process of setting up a basic Google Analytics account. Because this version of Google Analytics is being discontinued, we strongly recommend that you install a Google Universal Analytics account instead.

Page View Tracking

Shows the origin of visitors and the pages visited.

Ecommerce Tracking

Shows which customers make purchases, and what they buy.

Universal Analytics

An updated integration with additional Google features.

Process Overview:

Step 1: Set Up a Google Merchant Account

Step 2: Turn On Ecommerce Tracking

Step 3: Complete the Magento Configuration

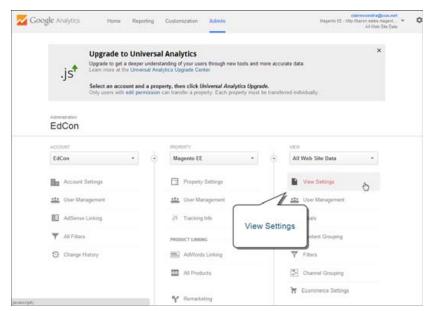
Step 1: Set Up a Google Merchant Account

- **1.** The first step is to establish a Google merchant account, and then verify and claim your website URL. For detailed instructions, see: Google Merchant Center.
- **2.** When you sign up for an account, a report appears that shows your new Google Analytics account number in the following format: UA-XXXXXX-1. Write this number down, because it is required to complete the configuration for your store.

Step 2: Turn On Ecommerce Tracking

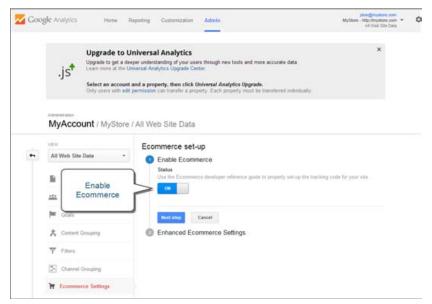
- 1. Sign in to your Google Analytics account.
- 2. On the main menu, select Admin.

The options in the Administration section are organized into three columns under Account, Property, and View. If you have multiple accounts or stores, make sure that the Account button is set to the correct account, and that the Property button is set to the correct store.



Google Analytics Admin

- 3. In the View column, select the **View Settings** option.
- 4. In the panel on the left, select **Ecommerce Settings**. Then, do the following:
 - **a.** Click the **Status** switch to turn on Ecommerce Tracking. Then, click the **Next step** button.
 - **b.** Click the **Submit** button to save the setting. When the Success message appears at the top of the page, you are done.



Ecommerce Tracking On

Step 3: Complete the Magento Configuration

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Google API**.
- 2. Click to expand the **Google Analytics** section, and do the following:

Google Analytics				٢
Enable	No	•	[STORE VIEW]	
Туре	Universal Analytics A The tracking code to use.	•	[STORE VIEW]	
Account Number			[STORE VIEW]	
Enable IP anonymization	No	•	[STORE VIEW]	

Google Analytics

- 3. Set Enable to "Yes."
- **4**. Set the **Type** of Google Analytics service to one of the following:

Universal Google's advanced service that is paid by subscription. Analytics

Google Analytics Google's basic free service.

5. In the **Account Number** field, enter the Google Analytics account number, or tracking code that you wrote down when you signed up for the service.

6. To render as anonymous part of your visitors' IP addresses before the data is sent to Google, set **Enable IP Anonymization** to "Yes."

According to Google, anonymizing IP addresses can reduce the accuracy of geographic data in the Analytics report.

7. When complete, click the **Save Config** button.

Google Shopping

Google Shopping gives you the ability to upload product feeds from your catalog so your products can be easily found through Google Search. Any Simple product from your catalog can be uploaded to Google Shopping. The product attributes that are mapped to Google are used as search parameters by customers looking for products. After mapping the product attributes to sync with Google Content attributes, you can create a simple upload from your store to Google Shopping.

Magento Connect has a number of extensions that you can install to establish integration with Google Shopping. Some extensions are free, and others are available for purchase from developers. In addition to Google Shopping, there are many extensions available to integrate your store with shopping sites. Visit Magento Connect and read the descriptions and reviews, to help you decide which solution is the best for your store. Then, follow the instructions to install the extension.



Google Shopping Extensions

Notes	



Content Elements

In this section...

Magento CMS

Content Pages

Blocks

Widgets

Variables

Markup Tags



CHAPTER 28: Magento CMS

The old adage, "content is king" is more true now than ever before. The term, content marketing refers to the art of promoting your products or services by providing valuable information to your customers at no charge. The quality of your content helps distinguish your store from others, increases your visibility to search engines, and provides support to your customers. This soft-sell approach is often more effective than advertising, builds credibility and trust, and can turn your store into a destination.

Your content should reflect the branding of your store, and be delivered with your distinctive visual presentation and voice to convey your message. Use pictures to tell a story. Educate, inspire, and entertain. With quality content, sometimes less is more.

Magento Community Edition includes a powerful content management system (CMS) that you can use to create rich content for your store. In this chapter, you will learn how to create new content, and incorporate existing content to create a compelling experience that will bring your customers back to your store for more.

Additional Resources Curated Commerce

CMS Menu



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.



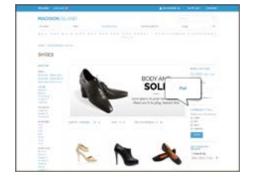
Static Blocks

The CMS makes it easy to 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

Use the Widget tool to display dynamic data and add blocks, links, and interactive elements most anywhere in your store.



Polls

Create polls to learn about your customers' opinions and preferences. They're fun to take and see the results!



CHAPTER 29: Content 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. Examples of evergreen content include customer success stories, "how to" instructions, and Frequently Asked Questions (FAQ.) Other content is perishable by nature, such as events, industry news, and press releases.

Topics in this chapter:

- Core Content
- Creating a Page
- Using the Editor
- Media Storage
- Translating Pages

Core Content

The Magento demo store has examples of core content pages that can help you get started. Take a look at the following pages in your store, to make sure that they convey your message and brand.



Home

The demo "Home" page includes a banner, an image carousel, several static blocks with links, and a list of new products.



About Us

The "About Us" page is linked from the footer of your store. You can include images, video, links to press releases and announcements. The sample page has an image on the right, and one of a decorative sort to indicate the end of the page.

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-	-					
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	**************************************		Sector Sector	10 10	inter a	
		"	14	Ta .	inter-	

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.



	2	Enabl
ARE CODINEED		The "Ena your site
		browsers

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.

e Cookies

able Cookies" page appears when visitors to do not have cookies enabled in their s. The page provides step-by-step, illustrated instructions to enable cookies for the most popular browsers.

PIADISC	WILLAND .					
				-	-	
			PR.M.			
	and the second of the	all is financial to a gifter i				
-			-			-
					-	

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 CMS home page. It also determines which CMS page appears when a "404 Page Not Found" error occurs, and if a breadcrumb trail appears at the top of CMS pages.

fault Pages			
Default Web URL	cms	[STORE VIEW]	
CMS Home Page	Madison Island	 [STORE VIEW] 	
Default No-route URL	cms/index/noRoute	[STORE VIEW]	
CMS No Route Page	404 Not Found 1	▼ [STORE VIEW]	
CMS No Cookies Page	Enable Cookies	▼ [STORE VIEW]	
Show Breadcrumbs for CMS Pages	Yes	▼ [STORE VIEW]	

Default Pages

To configure the default pages:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under General, select **Web**.
- **3.** If necessary, set **Current Configuration Scope** in the upper-left corner to the store view where the setting applies.
- 4. Click to expand the **Default Pages** section. Then, do the following:
 - **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."
- 5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Default Web URL	Store View	Indicates the landing page that is associated with the base URL. This is set by default to "cms" to indicate a page from Magento's content management system. You can also use a different type of landing page, such as a blog. For example, if a blog is installed on the server at magento/blog, you can enter the name of the "blog" folder as a relative path to the selection of pages.
CMS Home Page	Store View	To choose the home page for the store, simply select the CMS page from the list. By default, the CMS Home Page lists the entire selection of CMS pages that are available for your store.
Default No-route URL	Store View	Contains the URL of the default page that you want to appear when if a 404 "Page not Found" error occurs. The default value is: cms/index/noRoute
CMS No Route Page	Store View	Identifies a specific CMS page that you want to appear when a " 404 Page Not Found" error occurs. The default core content page is "404 Not Found."
CMS No Cookies Page	Store View	Identifies a specific CMS page that appears when cookies are not enabled for the browser. The page explains why cookies are used, and how to enable them for each browser. The default core content page is "Enable Cookies."
Show Breadcrumbs for CMS Pages	Store View	Determines if a breadcrumb trail appears on all CMS pages in the catalog. Options include: Yes / No

Creating a Page

The process of adding a new content page to your store is essentially the same for any type of page you might want to create. You can include text, images, blocks of content, variables, and widgets. Most content pages are designed to be read by search engines first, and by people second. Keep the needs of each of these two very different audiences in mind when choosing the page title and URL, composing the meta data, and writing the content.

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: Publish the Page Step 6: Make a New Home Page (Optional)

Step 1: Add a New Page

- 1. On the Admin menu, select CMS > Pages > Manage Content.
- 2. Click the Add New Page button.
- **3.** In the Page Information section, do the following:

Page Information			
Page Title *			
URL Key *	Relative to Website Base URL		
Store View *	All Store Views Main Website Madison Island English Friench German	Ø	
Status *	Enabled	×	

Page Information

- **a.** Enter a **Title** for the new page.
- **b.** Enter a **URL Key** for the page that is based on the Title. It should be all lowercase characters, with hyphens instead of spaces.

The URL Key is added to the base URL for your store, to create the online address for the page.

- c. In the **Store View** list, select each view where this page will be available.
- d. Set **Status** to "Disabled." (This will be changed when the page is ready to publish.)

4. With the required fields complete, click the **Save and Continue Edit** button.

Step 2: Select the Page Layout

- 1. In the Page Information panel on the left, select **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

age Layout		
Layout*	1 column	
Layout	Empty	
Layout Update XML	1 column	
	2 columns with left bar	
	2 columns with right bar	
	3 columns	

Page Layout

Step 3: Complete the Content

- **1.** In the Page Information panel on the left, select **Content**.
- **2.** In the **Content Heading** box, type the text you want to appear as the main heading at the top of the page.

Complete the remaining content, as you want it to appear in the main content column, according to the page layout selected. The content can include text, images, variables, and widgets with dynamic data.

3. Click the **Show** / **Hide Editor** button to display the WYSIWYG editor. You can format the text with the toolbar buttons.

Show / Hide Editor	About Us
X 43 63 68 (A) 13 ≤ (B) (C) 12 (2, → (■ ■ Styles • Paragraph • Font Paraly • Font State • □ □ ■ ↓ ● ↓ ● ↓ ● • ● • ●<
	opolitan appeal. Madison Island gives couture-conscious frequent fivers exactly what they want—unprecedented access on, style solutions for easy international jet setting, and convenient worldwide delivery.
	n, agin administra na saay maasinaanna ya adming, and oogenemen wonnemen Genery).

WYSIWYG Editor

4. Click the **Show** / **Hide Editor** button again to return to the HTML mode. You can work in either mode that you prefer.

Content		
Content Heading	About Us le Editor Insert Widget Ig: Insert Warable	
	signed with cosmopolitan appeal, Madison Island gives couture-conscious frequent flyers exactly what they precedented access to the latest looks of the season, style solutions for easy international jet setting, and convenient worldwide	
	_	

HTML Mode

5. Click the Save and Continue Edit button.

Step 4: Complete the Meta Data

- **1.** In the panel on the left, select **Meta Data**.
- **2.** Complete the **Keywords** and **Description** for the page. This information is used by search engines to index the page.

Step 5: Publish the Page

- **1.** In the panel on the left, select **Page Information**.
- 2. Set Status to "Published."
- 3. Click the Save Page button.

When the page is complete, it can be added to the navigation of your store, linked to other pages, or added as a link in the footer.

Step 6: Make a New Home Page (Optional)

- **1.** Complete the steps to create a new page.
- 2. On the Admin menu, select **System > Configuration**.
- **3.** In the panel on the left under General, select **Web**. Then, click to expand the **Default Pages** section.
- 4. Set CMS Home Page to the new page.
- 5. Click the Save Config button.
- 6. In the message at the top of the workspace, click the **Cache Management** link.
- **7.** Select the checkbox for the invalid **Layout** cache. Then, click the **Submit** button to refresh the cache.

Using the Editor

The WYSIWYG editor gives you the ability to enter and format while working in a "What You See Is What You Get" view of the content. If you prefer to work directly with the underlying HTML code, you can easily change modes. The editor can be used to create content for pages, blocks, and product descriptions. When working in the product catalog, the editor is accessed by clicking the WYSIWYG Editor button.

For a complete list of toolbar buttons, see the Editor Toolbar in the appendix of this guide.



Editor Toolbar

Inserting a Link

The easiest 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.

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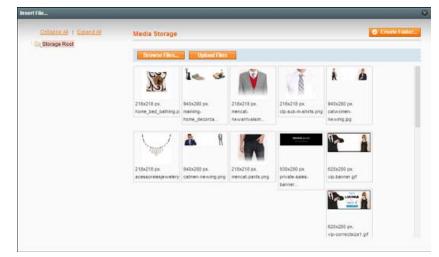
Link Button

To insert a link:

- 1. Highlight the text where you want to create the link. Then, in the editor toolbar, click the 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 that appears when someone hovers over the link.
- 5. Click the **Insert** button to create the link.

Inserting Images

From the editor, you can insert an online image that resides on another server, or display an image that has been uploaded to Media Storage.



Media Storage

Method 1: Insert an Image from Media Storage

- 1. If necessary, click the **Show / Hide Editor** button to display the code.
- **2.** Position the cursor where you want the code to be inserted. Then, click the **Insert Image** button.
- 3. Select the image that you want to use, and click the **Insert File** button.
- 4. To view the image in WYSIWYG mode, click the **Show** / **Hide Editor** button.

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. Click the Show / Hide Editor button to work in WYSIWYG mode.
- 2. Position your cursor where you want the image to appear.
- 3. On the Editor toolbar, click the **Insert Image** button. Then, do the following:

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Insert Image Button

- **a.** In the **Image URL** field, paste the full Web address to the image.
- **b.** In the **Image Description** field, write a brief description of the image.
- c. In the **Title** field, write a relevant title for the image.
- 4. Click the **Insert button** to complete the process.

Adding 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 by block reference or incorporated directly into CMS content and email templates. You can create links to the following types of content:

- CMS Pages
- Catalog Categories
- Catalog Products

Links can be displayed as a block, or used inline and incorporated into existing text. By default, a link inherits its style from the location (block reference) according to the style sheet (styles.css) of the theme.

To add a widget to a page:

- **1.** Open the CMS page to be edited.
- 2. In the panel on the left, select **Content**. Then, use either of the following methods:

Method 1: WYSIWYG Mode

- 1. Click the Show / Hide Editor button to display the page in WYSIWYG mode.
- 2. Position the cursor in the text where you want the widget to appear.
- 3. On the editor toolbar, click the **Insert Widget** button.

Method 2: HTML Mode

From the HTML editor, click the **Insert Widget** button.

3. Do the following:

- **a.** When prompted, select the **Widget Type**. In this example, we insert a link to a product.
- b. You can leave the Anchor Custom Text field empty to use the product name.
- **c.** Enter a **Anchor Custom Title** for best SEO practice. (The title isn't visible on the page.)
- d. 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."

nsert Widget		8
Widget Insertion		💼 Insert Widget
Widget		
Widget Type *	Catalog Product Link	
Widget Options		
Anchor Custom Text	▲ If empty, the Product Name will be used	
Anchor Custom Title	Pearl Earrings	
Template	Product Link Block Template	
Product*	Not Selected	
	Select Product	

- 4. Click the **Select Product** button, and do the following:
 - **a.** In the tree, navigate to the category you want.
 - **b.** In the list, click the product that you want to include in the link.

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Shoes	551	acj003	Pearl Stud Earrings
Bags & Luggage	662	acj004	Swing Time Earlings
👔 🧫 Hame & Decor	553	acj000	Silver Desert Necklace
Sale	554	acj005	Swiss Movement Sports Watch
Gift Card	555	acj007	Pearl Necklace Set
Pilvate Sales Root			

Select the Product

c. Click the **Insert Widget** button to place the link on the page. The link markup tag is enclosed in double curly braces.

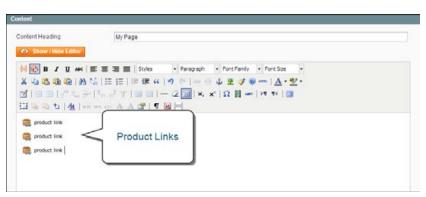
d. If needed, use Cut (Ctrl + x) and Paste (Ctrl + v) to position the markup tag in the code where you want the link to appear.



Widget Link Code

5. Click the **Show / Hide Editor** button to see the link in WYSIWYG mode.

Now you can continue editing the page, and incorporate the links into the rest of the content.



Widget Links on CMS Page

Media Storage

Media storage is a tool you can use to organize and access miscellaneous media files on the server. The path to the physical 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.

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	218x215 px acessorelesje welery	940x200 px. catmen-newing.png	218x218 px. mencal-pants.png	930x260 px. private-sales- banner	620x260 px vp-banner gif		
					620×280 px.		

Media Storage

To upload an image to media storage:

- **1.** From the editor, do the following:
 - a. Click the **Browse Files** button. Find the file on your computer, and click to select it. Then, click the **Open** button to copy the file to Media Storage.
 - **b.** Click the **Upload File** button to add the image to Media Storage.
- 2. To link the image to a file, click to select the image. Then, click the **Insert File** button.
- 3. To complete the Alt tag, place the cursor between the double-quotes, and enter the alt text.
- 4. To see the image in WYSIWYG mode, click the **Show / Hide Editor** button.

Translating Pages

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 only 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. In the following example, the About Us page is available in for the English, French, and German store views, but not Spanish.

To translate a CMS page, you must create a new page that has the same URL Key as the original, but is assigned to the specific store view. Then, update the page with the translated text. The following example shows how to create a translated version of the About Us page for the Spanish store view.

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Original "About Us" and Translated Page

To create a translated page for a view:

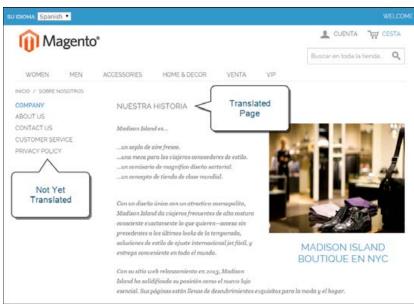
- 1. On the Admin menu, select CMS > Pages.
- 2. From the Manage Pages list, open the page to be translated and copy the **URL Key** to the clipboard. Then, press the **Back** button to return to the Magage Pages list.
- 3. Click the **Add New Page** button. Then, do the following:
 - a. Enter the translated Page Title.
 - **b.** Paste the **URL Key** that you copied from the original page.
 - **c.** In the **Store View** box, select the store view where the page will be available, which in this case is "Spanish."

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Page Title *	Sobre Nosotros	
DI Kaut	allow the second allows at an	
JRL Key *	about-magento-demo-store	
	Relative to Website Base URL	
Store View *	All Store Views	
	Main Website	
	Madison Island	
	English	
	French	
	German	
	Spanish	
		-
Status *	Enabled	

Translated Page Information

- **d.** In the panel on the left, select **Contents**. Then, complete the translated text for the page.
- e. On the Design tab, set the column Layout for the page.
- f. On the Meta Data tab, enter the translated text for the **Keywords** and **Description**.
- **4**. When complete, click the **Save Page** button.
- **5.** If prompted to refresh the cache, click the link at the top of the page. Then, refresh any invalid caches.
- 6. Return to the storefront and select the view from the language chooser.

Notice that there are still some elements on the page that need to be translated, including the company footer links block, which on this page, appears in the left sidebar, the welcome message, and product information.



Translated Page



CHAPTER 30: Blocks

A block is a modular unit of content that can be positioned most anywhere on the page. Blocks can be used to display static information such as text, images, and embedded video, as well as dynamic information.

You can use Magento Community Edition's content management system to create custom 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.

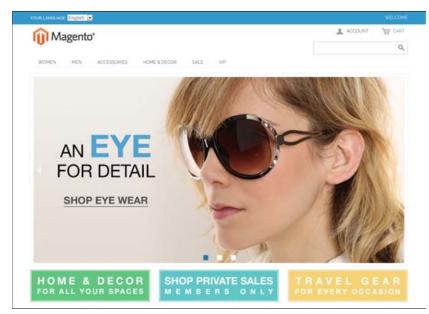
In addition, your store includes a selection of built-in blocks that make it easy to add features and functionality to your store. Some built-in blocks are required components of your store, while others are shopping tools that can be enabled or disabled according to your preference. Many of the built-in blocks can be added to your store with the Widget tool. Blocks can also be defined and positioned by entering XML code in the Layout Update box on the target page..

Topics in this chapter:

- Creating a Static Block
- Positioning Blocks by Reference

Creating a Static Block

Custom, static blocks of content can be added to any page, group of pages, or even to another block. The carousel image slider on the home page of the demo store is generated by code that is placed in a static block. The three smaller blocks below are also static blocks that link to other pages. Although they look like graphic images, they are actually defined using HTML and CSS.



Static Blocks on Home Page

To create a block:

- 1. On the Admin menu, select **CMS > Static Blocks**.
- 2. In the upper-right corner, click the Add New Block button. Then, do the following:
 - **a.** Assign a descriptive **Block Title**.
 - **b.** Assign a unique **Identifier** to the block. Use all lowercase characters, with underscores instead of spaces. The identifier is used for internal reference.
 - c. Select the **Store View(s)** where this content block will be visible.
 - d. Set **Status** to "Enabled" to make the block visible in the store.
 - **e.** Complete the **Content** for the block. You can use the Editor to format text, create links and tables, add images, video, and audio.
- **3.** When complete, click the **Save Block** button.

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General Information

Positioning Blocks

The code that controls the page layout and placement of blocks is written in XML. You may have noticed references to XML Page Layout Updates throughout the Admin of your store. Every product, category, and piece of content—whether it's a page, block, or widget—has a section where you can update the XML code that controls the positioning of the item. The selection of available block references that is available varies by page type, and whether the customer is logged in, or is visiting the as a guest.

Widgets make it easy to position a block at a specific place on the page, and even for a specific product or category. You can select each option from a list, rather than trying to remember all of the possible combinations.

Category	and	CMS	Pages
----------	-----	-----	-------

BLOCK REFERENCE	POSITION
Breadcrumbs	The navigation aid at the top of many pages that shows your current location as a link. Any additional content placed in the Breadcrumbs reference floats to the right of the breadcrumbs, if displayed.
Left Column	Content is added to the left column.
Main Content Area	Content is added to the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
Right Column	Content appears in the right column.
Store Language	Content appears in the upper-left corner of the header.

Product Page

BLOCK REFERENCE	POSITION
Alert URLs	Content appears below the title of the product on the product detail page.
Bottom Block Options Wrapper	If custom options are added, content appears below the Add to Cart button.
Breadcrumbs	Content appears to the right of breadcrumbs—the navigation aid that provides links as a path—that's showcased below the navigation bar.
Info Column Options Wrapper	If a custom options are added, content appears to the right. The same location applies to configurable options.
Left Column	Content appears below the left column blocks.
Main Content Area	Content appears below the main content area.
My Cart Extra Actions	Content appears below the Cart Subtotal in the My Cart popup located within the top link.
Navigation Bar	Content appears below the main navigation bar.
Page Bottom	Content appears at the bottom of the page.
Page Footer	Content appears above the footer of the page.
Page Header	Content appears below the header of the page.
Page Top	Content appears at the top of the page.
PayPal Express Checkout (Payflow Edition) Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
PayPal Express Checkout Shortcut Wrapper	If the PayPal payment method is enabled, content appears below the PayPal buy button.
Product Tags List	Content appears below the products tag bar.
Product View Extra Hint	Content appears below the main top price of the product.
Right Column	Content appears below the right column blocks.
Store Language	Content appears to the right of the language chooser.
Tags List Before	Content appears above the Add Your Tags field.

Notes	



CHAPTER 31: 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 widgets 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 static 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.

Topics in this chapter:

- Widget Types
- Creating a Widget
- Static Block Widget
- New Products List
- Mini Shopping Cart

Widget Types

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 a link to a selected catalog category. Allows you to specify custom text and a title. Two templates are available: inline and block. 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 a link to a selected catalog product. Allows you to specify custom text and a title. Two templates are available: inline and block. When the link is complete, it can be used in content pages and blocks.

Orders and Returns

The Orders and Returns widget gives customers the ability to submit their own requests for return merchandise authorization.

Recently Compared Products

Displays the built-in 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 built-in block of recently viewed products. You can specify the number of products included, and format them as a list or product grid.

Mini Shopping Cart

If the store has a responsive theme, the Mini Shopping Cart widget can be used to display additional information, such as a banner or contact information, in the mini shopping cart.

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, which is the same for all types, and then complete the last part that is specific to the type of widget you want to create.

Process Overview: Step 1: Choose the Widget Type Step 2: Specify Where It Goes Step 3: Complete the Widget Options Step 4: Check It Out!

Step 1: Choose the Widget Type

- 1. On the Admin menu, select **CMS > Widgets**.
- 2. Click the Add New Widget Instance button. Then, do the following;
 - a. In the Settings section, select the **Type** of widget you want to create.
 - b. Select the Design Package/Theme that will be used with the widget.
- **3.** Click the **Continue** button.



Widget Settings

4. In the Frontend Properties section, do the following:

Гуре	CMS Static Block	v
Design Package/Theme	rwd / default	*
Vidget Instance Title *	My Widget	
Assign to Store Views *	All Store Views Main Website Madison Island	•
	English French German	
Sort Order	Sort Order of widget instances in the same	black

Frontend Properties

- **a.** In the **Widget Instance Title** field, enter a descriptive title for the widget. This title is for internal use only, and won't be visible to your customers.
- **b.** Set **Assign to Store Views** to "All Store Views," or to the view where the widget to 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 when listed with others in the column. The top position is zero.

Step 2: Specify Where It Goes

- 1. In the Layout Updates section, click the **Add Layout Update** button.
- **2.** Set **Display On** to the type of category or product page where you want the widget to appear.
- **3.** In the **Block Reference** list, select the block or section of your page layout where you want the widget to appear.

Layout Updates			Add Layout Update
Display On * Specified Page	×		Remove Layout Update
Page * CMS Home Page	Block Reference * Main Content Area	Template CMS Static Block Default Template	

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.

5. Click Save and Continue Edit to save your changes and continue editing.

Step 3: Complete the Widget Options

The options for each type vary slightly, but the process is essentially the same. The following instructions show how to place a CMS Static Block.

- **1.** In the panel on the left, select **Widget Options**.
- 2. Click the Select Block button.
- **3.** In the list, click to select the block you want to place.

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		13 Travel Glear Far Every Occasion	travel-pear-for-every-occasion	English	
		14 Category Landing Bottom Promo Block	category-landing-bottom-promo-block.	Enabled	
		15 Category Landingsage Accessories Links Block	category-landingsage-accessaries-intentiock	Enabled	
		16. Category Landing Page Accessories - Main Block	satepary-landingsage accessories maintifold.	Enabled	
		17 Category Landing Page Accessories	calepory-landingpage-accessories	Dratied	
		18. Main Image 404 Page	man mage 404 page	Enabled	
		18 PLP Header	pip-header	Dratled	
		21 Category Landing Page Home	category-iendingsage-home	Enabled	
		22. Category Landing Page Home - Main Block	category-landingpage-home-maintieux	Englied	
		23 Category Landingpage Home Links Block	salegory-landingpage home-inhistioch	Enabled	
		24 Category Landing Page Man	category landingpage men	Enabled	
		25 Category Landing Page Men - Main Block	callegory-landingpage-men-maintelock	Enabled	

Select Block

4. When complete, click the **Save** button.

The widget appears in the Manage Widget Instances list.

5. 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 block is in the correct location. To move the block to a different location, you can reopen the widget and try a different page or block reference.

CMS Static Block Widget

The CMS Static Block widget gives you the ability to place an existing CMS block most anywhere in your store.

Process Overview: Step 1: Choose the Widget Type Step 2: Complete the Layout Updates Step 3: Place the Block

Step 1: Choose the Widget Type

- 1. On the Admin menu, select **CMS > Widgets**.
- 2. Click the Add New Widget Instance button.
- **3.** In the Settings section, set **Type** to "CMS Static Block." Then, click the **Continue** button.
- 4. In the Frontend Properties section, do the following:
 - **a.** In the **Widget Instance Title** field, enter a descriptive title for the widget. This title is for internal use only, and is not visible to your customers.
 - **b.** Enter a number in the **Sort Order** field to determine the order of the block when listed with others in the column. The top position is zero.
 - **c.** 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.

Step 2: Complete the Layout Updates

- **1.** In the Layout Updates section, set **Display On** to the category, product, or page where you want the block to appear.
- **2.** To complete the Layout Updates, do the following:
 - **a**. Select the **Page** where you want the block to appear.
 - **b.** Select the **Block Reference** to identify the place on the page where the block will appear
 - **c.** Accept the default setting for **Template**, which is set to "CMS Static Block Default Template."
 - d. Click Save and Continue Edit.

Step 3: Place the Block

- **1.** In the panel on the left, select **Widget Options**.
- 2. Click the Select Block button.

Then in the list, click to select the block you want to place.

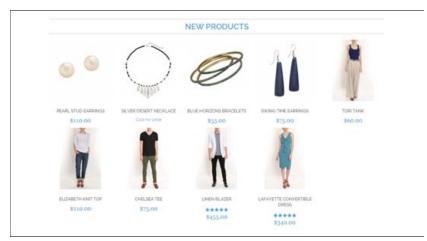
3. When complete, click the **Save** button.

The app appears in the Manage Widget Instances 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 is in the correct location. To move the block, you can reopen the widget and try a different page or block reference.

New Products List

The list of new products is an example of dynamic content, and consists of live data that is pulled from your product catalog. By default, the "New Products" list includes the first eight of the most recently added products. However, it can also be configured to include only products within a specified date range.



New Products List on Home Page

Process Overview:

Step 1: Set the Date Range for Each Product

Step 2: Create a Working Copy of the Widget

- Step 3: Select the Location for the List
- 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 dates must be specified in the product record. The product then appears in the New Products list during the date range specified.

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. Find the product you want to feature, and open the record. Then, do the following:
 - **a.** In the **Set Product as New From Date** field, click the calendar button and select the first date that you want the product to be featured.
 - **b.** In the **Set Product as New To Date** field, click the calendar button and select the last date that you want the product to be featured.

22002000000000000		1
Short Description *	Add a pop of color with these handmade bangles from India.	ESTORE VIEW
	Enter Wisiwiged Date Range	A
SKU*	acj0006s	[GLOBAL]
Weight*	0.2500	[GLGBAL]
Set Product as New from D	e 4/1/2014	[WEBSITE]
Set Product as Nev 2	April, 2014	(WEBSITE)
Status * Werk S	Mon Tue Wed Thu Fri Set	(WEBSITE)
URL Key 13	1 2 3 4 5	ISTORE VEW
14	7 8 9 10 11 12 ect for old URL	1.
Visibility * 15	14 15 16 17 18 19	ISTORE VEW
16	21 22 23 24 25 26	
Country of Manufac 17	28 29 30	(WEBSITE)
Enable RMA	Select date	[WEBSITE]

"Set Product As New " Date Range

- **3.** When complete, click the **Save** button.
- **4.** When you are prompted to reindex and refresh the page cache, click the links at the top of the workspace, and follow the instructions.

The product will now appear in the New Products list during this date range. Repeat this step for each product that you want to feature.

Step 2: Create a Working Copy of the Widget

The code that determines the content of the list and its placement in your store is generated by the Widget tool. To create your own working copy of the New Products list, simply save a copy of the existing widget. Your working copy is a new "instance" of the widget, and any changes you make will not affect the original.

- 1. On the Admin menu, select **CMS > Widgets**.
- 2. In the upper-right corner, click the **Add New Widget Instance** button.
- **3.** In the Settings section, do the following:
 - a. Set Type to "Catalog New Products List."
 - b. Select the Design Package/Theme that is used by the store.
- 4. Then, click the **Continue** button.

Settings		
Туре *	Catalog New Products List	•
Design Package/Theme *	enterprise / mds	•
	Ocontinue	

Widget Type

5. In the Frontend Properties section, complete the following fields:

Widget Instance 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.)

lype	Catalog New Products List	(m)
Design Package/Theme	rwd / delault	(9)
Widget Instance Title *	My Product List	
Assign to Store Views *	All Store Views Main Website Madison Island	9
	French German	
Sort Order	1.	

Widget Frontend Properties

Step 3: Select the Location for the List

- **1.** In the Layout Updates section, click the **Add Layout Update** button. Then, do the following:
 - a. Set Display On to "Specified Page."
 - b. Set Page to "CMS Home Page."
 - c. Set Block Reference to "Main Content Area."
 - d. Set **Template** to one of the following:
 - New Product Lists Templates
 - New Products Grid Template

Layout Updates			G Add Layout Update
Display On * Specified Pag	je 🔻		Remove Layout Update
Page *	Block Reference *	Template	
CMS Home Page	 Main Content Area 	 New Products Grid Template 	¥

Layout Updates

2. Click the **Save and Continue Edit** button to save your changes.

Step 4: Configure the List

- **1.** In the panel on the left, select **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.

Vidget Options	
Display Type *	New products All products - recently added products, New products - products marked as new
Display Page Control	N0 •
Number of Products to Display *	10
Cache Lifetime (Seconds)	A 64400 by default, if not set. To refresh instantly, Clear the Blocks HTML Output Cache.

Widget Options

- **4.** When complete, click the **Save** button.
- **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 menu, select CMS > Pages > Manage Content.
- **2.** Find the published page in the list, where you placed the New Products list. Then, in the **Action** column, click the **Preview** link.

Mini Shopping Cart Widget

You can use a widget to show relevant information to your customers when the mini shopping cart is displayed in your store. For example, you might want to display a promotional message, or you could provide a phone number or other contact information.

The mini shopping cart widget can be used only with responsive web design themes.

	DISON							ACCOUNT THE	CART
WOMEN	MEN ACCESSORES	HOME &	DECOR	SALE VP		Widget in M Shopping C		PRICE \$60.00 GTY 1 Edit.itum Remove term Details	
PRODUCT	CART	PRICE	στγ	SUBTOTAL		DISCOUNT CODES	USE CO	ODE 100FF TO GET 10%	DISCOUN
8	TORI TANK SKU) whiles Color: Indigs	\$80.00	1 East	\$60.00	8	ESTIMATE SHIPPING A COUNTRY *	vews	HOPPING CART CHEC	_
EMPTY CART	Silver L	UPDATE SHO	PPING CART	- CONTINUE SHO	PPNG	United States City	4	Pease select region, st 2	
									SIMATE

Widget in Mini Shopping Cart

Process Overview: Step 1: Choose the Widget Type Step 2: Complete the Layout Updates Step 3: Place the Block

Step 1: Choose the Widget Type

- 1. On the Admin menu, select **CMS > Widgets**.
- 2. Click the Add New Widget Instance button.
- **3.** In the Settings section, do the following:
 - a. Set Type to "CMS Static Block."
 - **b.** Set **Design Package/Theme** to any responsive web design (RWD) theme. You must select a responsive package/theme to use the mini cart widget.
 - **c.** Click the **Continue** button.

Settings			
Type *	CMS Static Block		
Design Package/Theme *	rwd / default	•	
	Continue		

Widget Settings

- **4**. In the Frontend Properties section, do the following:
 - **a.** In the **Widget Instance Title** field, enter a descriptive title for the widget. This title is for internal use only, and is not visible to your customers.
 - **b.** Enter a number in the **Sort Order** field to determine the order of the block when listed with others in the column. The top position is zero.

c. Set **Assign to Store Views** to "All Store Views," or to the view where the block will be available. To select more than one, hold the Ctrl key down and select each option.

Frontend Properties			
Туре	CMS Static Block		-
Design Package/Theme	rwd / default		¥
Widget Instance Title *	Mini Shopping Cart Test		
Assign to Store Views *	All Store Views	-	*
	Main Website Madison Island		
	English		
	French		
	German		
		-	Ŧ
Sort Order			
	 Sort Order of widget instances in the sa reference 	ame block	
	Telefence		

Frontend Properties

Step 2: Complete the Layout Updates

- **1.** In the Layout Updates section, set **Display On** to the category, product, or page where you want the block to appear.
- **2**. To complete the Layout Updates, do the following:
 - a. Select the **Page** where you want the block to appear.
 - b. Set Block Reference to "Mini-cart promotion block."
 - c. Accept the default Template setting, "CMS Static Block Default Template."
 - d. Click Save and Continue Edit.

Step 3: Place the Block

- 1. In the panel on the left, select **Widget Options**.
- 2. Click the **Select Block** button. Then in the list, click to select the block you want to place.
- **3**. When complete, click the **Save** button.

The block appears in the Manage Widget Instances 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 is in the correct location.

Notes	



CHAPTER 32: Variables

Variables are reusable pieces of information that can be created once and used in multiple places, such as email templates, blocks, and content pages. Your Magento store includes a large number of predefined attributes, and also gives you the ability to create your own custom variables.

Topics in this chapter:

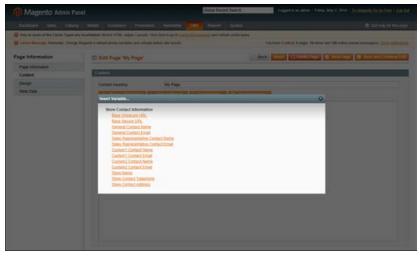
- Predefined Variables
- Custom Variables

Predefined Variables

Predefined variables are easy to add to content pages, blocks, and email templates.

To add a variable to a page:

- 1. On the Admin menu, select **CMS > Pages > Manage Content**. Then, click to open the page.
- **2.** In the Page Information panel on the left, select **Content**. Then from the editor, do one of the following:
 - Click the Insert Variable button.
 - If you prefer to work with the code, click the Show / Hide Editor button.
- **3.** Position the insertion point in the text where you want the variable to appear. Then, click the **Insert Variable** button.
- 4. In the list of available store contact variables, click the one you want to use.



Insert Variable

5. When complete, click the **Save** button.

To add a variable to a block:

- 1. On the Admin menu, select **CMS > Static Block**. Then, click to and open the block.
- **2.** From the editor, do one of the following:
 - Click the Insert Variable button.
 - If you prefer to work with the code, click the **Show / Hide Editor** button.

- **3.** Position the insertion point in the text where you want the variable to appear. Then, click the **Insert Variable** button.
- 4. In the list of available variables, click to select the one you want to use.
- 5. When complete, click the **Save Block** button.

To add a variable to an email template:

- 1. On the Admin menu, select **System > Transactional Emails**.
- **2.** Do one of the following:
 - Click to edit a predefined template.
 - Click the Add New Template button to create a new one.
- **3.** In the **Template Content** box, position the insertion point where you want the variable to appear. Then, click the **Insert Variable** button.
- 4. In the list of available variables, click to select the one you want to use.
- **5.** When complete, click the **Save Template** button.

Predefined Variables

STORE CONTACT VARIABLES

Store Contact Information Base Unsecure URL Base Secure URL General Contact Name General Contact Email Sales Representative Contact Name Sale Representative Contact Email Custom 1 Contact Name Custom 1 Contact Email Custom 2 Contact Name Custom 2 Contact Email Store Name Store Contact Telephone Store Contact Address

Custom Variables

If you know a little basic HTML, you can create custom variables and incorporate them into pages, blocks, banners, and email templates. When a variable is inserted into HTML, it is formatted as a markup tag, and enclosed in double curly braces.

{{CustomVar code= "store_hours"}}

To create a custom variable:

- 1. On the Admin menu, select **System > Custom Variable**.
- 2. Click the Add New Variable button.
- 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.

Variable	
Variable Code * Variable Aame * Variable HTML Value	
Variable Plain Value	

New Custom Variable

5. When complete, click the **Save** button.



CHAPTER 33: Markup Tags

A markup tag is a snippet of code that contains a relative reference to an object in your store, such as a page, block, or image. Markup tags can be incorporated into the HTML content of CMS pages, blocks, images, and email templates.

Topics in this chapter:

- Markup Tag Syntax
- Using Markup Tags in Links

Markup Tag Syntax

Markup tags are enclosed in double, curly braces, and can 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:

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"}}
```

Non-Inline CSS Tag

Because many email clients do not support CSS, this markup tag provides a way to convert the CSS styles that are used in email and newsletter templates to inline styles. The tag references the non_inline_styles variable to point to a CSS file on the server for the styles to be converted. The styles that are non-inline are copied to the <styles> tag of each message or newsletter that is sent. This tag can be used only with templates for transactional email and newsletters. To learn more, see the developer documentation.

{{var non_inline_styles.css}}

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 CMS content, such as a page, static block, banner, or email template. You can also use this technique to link an image to a specific page.

Process Overview:

Step 1: Identify the Destination URL

Step 2: Add the Markup to the URL

Step 3: Complete the Anchor Tag

Step 1: Identify the Destination URL

If possible, navigate to the page that you want to link to, and copy the full URL from the address bar of your browser. The part of the URL that you need comes after the "dot com forward slash." Otherwise, copy the URL Key from the CMS page that you want to use as the link destination.

Full URL to Category Page

```
http://mystore.com/apparel/shoes/womens
http://mystore.com/apparel/shoes/womens.html
```

Full URL to Product Page

http://mystore.com/apparel/shoes/womens/nine-west-pump

http://mystore.com/apparel/shoes/womens/nine-west-pump.html

Full URL to CMS Page

http://mystore.com/about-us

Step 2: Add the Markup to the URL

The Store URL tag represents the base URL of your website, and is used as a substitute for the "http address" part of the store URL, including the domain name and "dot com." There are two versions of the tag, which you can use, depending on the results you want to achieve.

store direct_url	Links directly to a page.
store url	Places a forward slash at the end, so additional references can be appended as a path.

In the following examples, the URL Key is enclosed in single quotes, and the entire markup tag is enclosed in double curly braces. When used with an anchor tag, the markup tag is placed inside the double quotes of the anchor. To avoid confusion, you can alternate using single-and double quotes for each nested set of quotes.

1. If you are starting with a full URL, delete the "http address" part of the URL, up through and including the "dot.com forward slash." In its place, type the Store URL markup tag, up through the opening single quote.

Store URL Markup Tag

```
http://mystore.com/apparel/shoes/womens
{{store url='apparel/shoes/womens'}}
```

Otherwise, type the first part of the Store URL markup tag, and paste the URL key or path that you copied earlier.

Store URL Markup Tag with URL Key

```
{{store url='
{{store url='apparel/shoes/womens'}}
```

2. To complete the markup tag, type the closing double quotes and double braces.

Step 3: Complete the Anchor Tag

1. Wrap the completed markup tag inside an anchor tag, using the markup tag instead of the target URL. Then, add the link text, and closing anchor tag.

Markup in Anchor Tag

Link Text

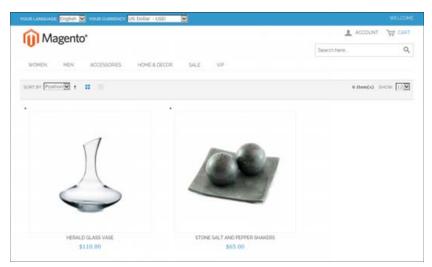
2. Paste the completed anchor tag into the code of any CMS page, block, banner, or email template, where you want the link to appear.

Complete Link with Markup

Shoe Sale

Product List on Home Page

By default, Magento uses a CMS page for the home page. You can add a markup tag to the content of your home page to display a product list from a specific category.



Home Page with Category Listing

To list a category on the home page:

- 1. On the Admin menu, select **Catalog > Manage Categories**.
- **2.** In the category tree, select the category that you want to use. Take note of the category **ID** that appears in parentheses after the category title. For example: (ID:4)
- **3.** On the Admin menu, select **CMS > Pages**. Then, open your home page and do the following:
 - a. In the panel on the left, select **Content**.
 - **b.** In the editor, "comment out" the current code by enclosing it in beginning and ending comment tags.

```
<!---
(your current home page code)
-->
```

c. Paste the following markup tag into the editor, substituting the **ID** of the category that you want to appear:

```
{{block type="catalog/product_list" name="home.catalog.product.list"
alias="products_homepage" category_id="4"
template="catalog/product/list.phtml"}}
<!--
(your current home page code)
-->
```

If you ever want to restore your previous home page, simply remove the comment tags from the original code, and comment out the markup tag. If you don't plan to ever use the original code, it can be deleted from the page.

Content	
Content Heading	
💿 Show / Hide Editor 🖷 Insert Widget 👔 Insert Image 👔 Insert Variable	
{{block type="catalog/product_list" name="home_catalog.product_list" alias="products_homepage" template="catalog/product/list_phtml"}}	
cdiv class="slideshow-container"> cul class="slideshow"> class="slideshow" class="slideshow" class=	
<a base_url"}="" href="{(config path=" men.html"="" secure="" web=""><img alt="Wing man - hit the runway in stylish separates and casuals - Click to
Shop Man" slide-3.jgg")}"="" src="{(media url=" wysiwyg=""/>	
<div class="slideshow-pager">&hbsp:</div> &hbsp: &hbsp: <ul class="formons">	
class=provide provide provi	
<pre><ii><ii><ii><ii><ii><ii><ii><ii><ii><i< td=""><td></td></i<></ii></ii></ii></ii></ii></ii></ii></ii></ii></pre>	
uc_ping // >- xa>min 4li>	

Home Page Content

- 4. Click the Save Page button.
- 5. In the message at the top of the workspace, click the **Cache Management** link.
- 6. Select the checkbox for the invalid **Layout** cache. Then, click the **Submit** button to refresh the cache.

Notes	



Design & Theme

In this section...

Your Store Design

Page Layout

Layout Updates

Page Setup

Your Store's Theme



CHAPTER 34: Your Store Design

Magento provides a variety of easy-to-use design options that you can use to apply your own customized look-and-feel to your store. To learn more advanced techniques, such as how to use themes, skins, layouts, and blocks, see the Magento Design Guide.

Magento is an object-oriented environment with pages that are assembled from separate components. For some, this approach requires a slightly different way of thinking, because there isn't a single HTML page that corresponds to any given page. After you understand the basics, you'll appreciate working in such a flexible and fluid environment!

Topics in this chapter:

- Uploading Your Logo
- Uploading a Favicon
- Welcome Message
- Store Demo Notice

Uploading Your Logo

The size of the logo in the header is determined by your theme. If your theme has a sample logo, right-click and download the logo to make sure the new logo is the same size.

M M	agento	D*			L ACCOUNT THE CA
.0.	-0				
WOMEN	MIN	ACCESSORIES	HOME & DECOR	SALE VP	

The logo image path points to its location on the server. What is actually a long path is entered as a short path that is relative to the theme. For example:

Actual path:	<pre>skin/frontend/base/default/images/logo.gif</pre>
Relative path:	images/logo.gif

The header image filename is hard-coded into some theme files. If you change the name of the logo file, you will have to make updates to some source files. For non-programmers, the easiest approach is to use the default filename, "logo.gif," and write over the existing file.

To change the logo:

- **1.** On the server, copy your new logo file to the images folder of your theme. For example: skin/frontend/base/default/images/logo.gif
- 2. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
- **3.** If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
- 4. Click to expand the **Header** section. Then, do the following:
 - a. If the path or filename has changed, enter it in the Logo Image Src field.

Header			۲
Logo Image Src	images/logo.gif	[STORE VIEW]	
Logo Image Alt	Madison Island	[STORE VIEW]	
Small Logo Image Src	images/logo_small.png	[STORE VIEW]	
Welcome Text	Welcome	[STORE VIEW]	

Logo Image Path

b. In the **Logo Image Alt** field, enter the alt text for the image. If the configuration is for a different language view, enter the alt text in the appropriate language.

- **c.** If your store uses a responsive theme, in the **Small Logo Image Src** field, enter the path to a version of the logo that is optimized for small devices.
- **5.** When complete, click the **Save Config** button.

Uploading 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. Although Magento accepts .ico, .png, .jpg, .jpeg, .apng, and .svg file types, not all browsers support these formats. The most widely-supported file format to use for a favicon is .ico. There are many free tools available online that you can use to generate an .ico image or convert an exiting image to the .ico format.



Favicon in Address Bar



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 menu, select **System > Configuration**.
- **2.** In the panel on the left, under General, select **Design**. Then, click to expand the **HTML Head** section.
- **3.** To upload a favicon, click the **Choose File** button. Then, select the favicon file that you prepared.



- 4. To delete the current favicon, select the **Delete Image** checkbox.
- **5.** When complete, click the **Save Config** button.

Step 3: Refresh the Cache

- 1. As soon as the favicon is uploaded, you are prompted to refresh the cache. Click the **Cache Management** link in the message at the top of the workspace.
- 2. In the list, select the Page Cache checkbox that is marked "Invalidated."
- 3. In the upper-right corner, set **Actions** to "Refresh" and click the **Submit** button.
- 4. To view the new favicon, return to your storefront and press **F5** to refresh the browser.

Changing the Welcome Message

The "Welcome" message in the upper-left corner expands to include the name of customers who are logged in. You can change the text for each store or store view.

SUB LANCUAGE Englis	n 💿		WELCOME AND
间 Mager	nto*		Welcome
WOMEN MEN		HOME & DECOR SALE VIP	Message

Welcome Message

To change the welcome message:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
- **2.** If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
- 3. Click to expand the **Header** section.
- 4. In the Welcome text box, enter the text that you want to appear in the header,

ogo Image Src	images/logo.gif	[STORE VIEW]	
ogo Image Alt	Madison Island	[STORE VIEW]	
mall Logo Image Src	images/logo_small.png	[STORE VIEW]	
/elcome Text	Welcome	[STORE VIEW]	

Welcome Text

- 5. When complete, click the Save Config button.
- **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.

Store Demo Notice

If you are using a store as a demo, or if it is online but still "under construction," you can display a store demo notice at the top of the page. When you are ready to "go live" with the store, simply remove the message.

To set the store demo notice:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
- 2. Click to expand the **HTML Head** section.
- 3. Scroll down and set the **Display Store Demo Notice** to your preference.
- 4. When complete, click the **Save Config** button.



Store Demo Notice

Notes	



CHAPTER 35: Page Layout

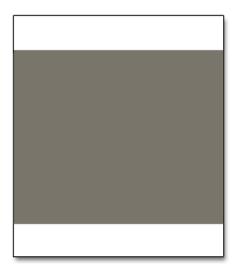
The layout of each page in your store consists of distinct sections, or containers, that define the header, footer, and content areas of the page. Depending on the layout, each page might have one, two, three columns, or more. You can think of the layout as the "floor plan" of the page.

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.

Topics in this chapter:

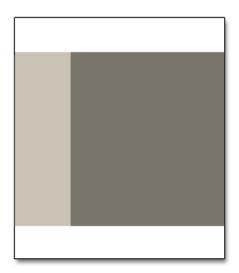
- Standard Layouts
- Storefront Examples
- Layout Updates

Standard Layouts



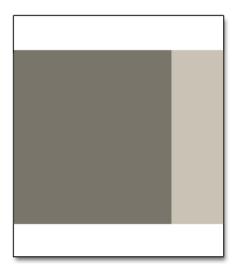
1 Column

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.



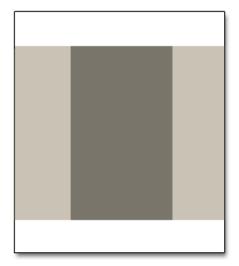
2 Columns with Left Bar

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.



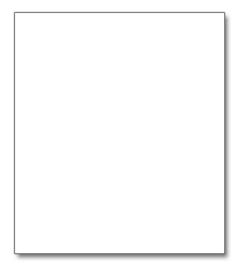
2 Columns with Right Bar

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 that have blocks of supporting content on the right.



3 Columns

The "3 Column" layout has a center column that is wide enough for the main text of the page, with room on each side for additional navigation and blocks of supporting content.



Empty

The "Empty" layout can be used to define custom page layouts. To learn more, see the Magento Design Guide.

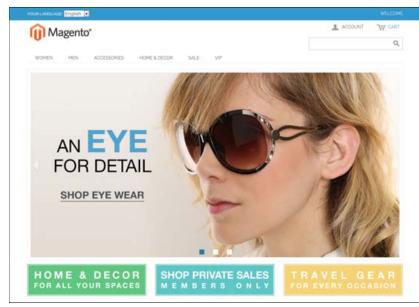
Storefront Examples

The column dimensions are determined by style sheet of the theme. Some themes apply a fixed pixel width to the page layout, while others use percentages to make the page respond to the width of the window or device.

Most desktop themes have a fixed width for the main column, and all activity takes place within this enclosed area. Depending on your screen resolution, there is empty space on each side of the main column.

1 Column Layout

The content area of a "1 Column" layout spans the full-width of the main column. This layout is often used for a home page with a large banner or slider, or pages that require no navigation, such as a login page, splash page, video, or full-page advertisement.



1 Column Layout

2 Columns with Left Bar

The content area of this layout is divided into two columns. The main content column floats to the right, and the side bar floats to the left.

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Magento"			11	A necessary we construe
U				Q,
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\$190.00 and above (1)	No. 1	5 2		
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Blue (I)		11	11	
Charcoal (1)				
White (3)				
OCCASION	FRENCH CUFF COTTON TWILL OXFORD	SLIM FIT DOBILY OXFORD SHIRT	PLAD COTTON SHRT \$160.00	
Career (1)	\$190.00	\$175.00 \$140.00	3100.00	
Cassual (1)	WEN/DETAILS	VEW DETAILS	VICH DETAILS	
Evening (1)	Add to Windows	Add to Wishist	Add to Wishint	
	Add to Compare	Add to Compare	Add to Company	
TYPE				
Shirts (3)	source Poston . + vew	A4 11 📃		3 Ben(s) 500W 12 .

2 Columns Left Bar

2 Columns with Right Bar

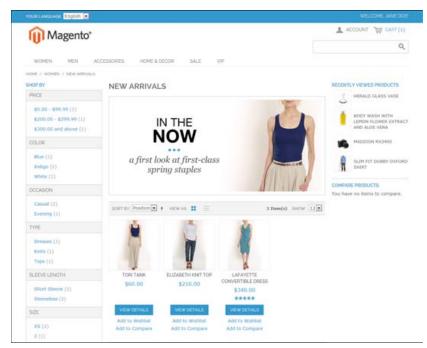
This layout is a mirror image of the other two-column layout. This time, the side bar floats to the right, and the main content column floats to the left.

Magento"				ACCOUNT TW CART (1)
0				Q
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OHE / HOHE&DECOR / BOOKS	8.99.20C			
BOOKS & MUSIC				RECENTLY VIEWED PRODUCTS
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A TALE OF TWO CITIES	ALICE IN WONDERLAND	AROUND THE WORLD IN BU DAYS	FALLING BY LAM NOT	COMPARE PRODUCTS
\$10.00	\$5.00	\$5.00	\$2.00	You have no items to compare.
VEW DETAILS	VEWDETALS	VEW DETAILS	ADD TO CAST	
Add to Weblet	Add to Wwhite	Add to Weshinst	Add to Weihint	
Add to Compare	Add to Complete	Add to Compare	Add to Compare	
	Man Long Long	COLUMN TWO IS NOT		

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 refers to the visual and structural composition of the page. However, the term layout update refers to a specific set of XML instructions that determines how the page is constructed.

The XML layout of your Magento Community Edition store is a hierarchical tree 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 CMS home page in edit mode, and select 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 a widget. To place a CMS static block of content with a widget, you must identify the page, and location on the page, where you want the block to appear. You can use the Widget tool to place a block on any generic page of your store, including the home page and all CMS pages. However, to place a block in the sidebar of a specific CMS page, you must make a layout update.

Placing a Block with a Layout Update

Blocks can be placed in the left or right column 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 column, and control its position in relation to other blocks.

As you work with the underlying code, you will encounter slightly different terminology. For example, the term callout is sometimes used to refer to a block that is defined as a layout update with XML code. The term sidebar refers to the left or right columns of the page layout. For our general discussion, we use the terms block and column. However, when entering layout update code, make sure to follow the syntax exactly as shown in the example.

To place a block in a side column:

- 1. On the Admin menu, select CMS > Pages > Manage Content.
- 2. Click to open the CMS page. Then, in the panel on the left, select **Design**.
- **3.** In the Layout Update XML box, enter the code for the right or left sidebar, as shown in example. Then, do the following:
 - a. Change the **reference name** to identify either the "right" or "left" column.
 - **b.** Change the **block_id** to the identifier of the block to be placed.

Code for CMS Block in Side Column

```
<reference name="right">
<block type="cms/block" name="right.permanent.callout">
<action method="setBlockId"><block_id>your-block-id</block_id></action>
</block>
</reference>
```

4. When complete, click the **Save Page** button.

Controlling Block Order

To control the order of blocks in an XML layout update, include 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 CMS 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">
```

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.

root			page/html
head			page/html_head
after_body_start			core/text_list
global_notices			page/html_notices
header top.links	page/templa	te_links store_langua	page/html_header ge page/switch
top.menu			core/text_list
top.container			page/html_wrapper
breadcrumbs			page/html_breadcrumbs
left core/text_list	global_messages	core/text_messages	right core/text_list
	messages	core/text_messages	
	content	core/text_list	
footer			page/html_footer
bottom.container			page/html_wrapper
store_switcher	page/switch f	ooter_links	page/template_links
before_body_end			core/text_list
core_profiler			core/profile

Standard Block Layout

Block Descriptions

BLOCK TYPE	DESCRIPTION
page/html	There can be only one block of this type per page. The block name is "root," and, it is one of the few root blocks in the layout.You can also create your own block and name it "root," which is the standard name for blocks of this type.
page/html_head	There can be only one block of this type per page. The block name is "head," and it is a child of the root block. This block must not be removed from layout.
page/html_notices	There can be only one block of this type per page. The block name is "global_notices," and it is a child of the root block. If this block is removed from the layout, the global notices will not appear on the page.
page/html_header	There can be only one block of that type per page. The block name is "header," and it is a child of the root block. This block corresponds to the visual header at the top of the page, and contains several standard blocks. This block must not be removed.
page/html_wrapper	Although included in the default layout, this block is deprecated, and only is included to ensure backward compatibility. Do not use blocks of this type.
page/html_breadcrumbs	There can be only one block of this type per page. The name of this block is "breadcrumbs," and it is a child of the header block. This block displays breadcrumbs for the current page.
page/html_footer	There can be only one block of this type per page. The block name is "footer," and it is a child of the root block. The footer block corresponds to the visual footer at the bottom of the page, and contains several standard blocks. This block must not be removed.
page/template_links	There are two blocks of this type in the standard layout. The "top.links" block is a child of the header block, and corresponds to the top navigation menu. The "footer_links" block is a child of the footer block, and corresponds to the bottom navigation menu. It is possible to manipulate the template links, as shown in the examples.

BLOCK TYPE	DESCRIPTION
page/switch	There are two blocks of this type in a standard layout. The "store_language" block is a child of the header block, and corresponds to the top language switcher. The "store_switcher" block is a child of the footer block, and corresponds to the bottom store switcher.
core/messages	There are two blocks of this type in a standard layout. The "global_messages" block displays global messages. The "messages" block is used to display all other messages. If you remove these blocks, the customer won't be able to see any messages.
core/text_list	This type of block is widely used throughout Magento, and is used as a placeholder for rendering children blocks.
core/profiler	There is only one instance of this type of block per page. It is used for the internal Magento profiler, and should not be used for other purposes.

Block Descriptions (cont.)

Layout Update Syntax

Custom layout updates can be applied to product category pages, product pages, and CMS page to achieve a variety of results, such as:

<block></block>	Create new block.
<reference></reference>	Update existing content.
<action></action>	Assign actions to blocks.
<remove></remove>	Remove blocks.

Any change made to the layout is applied when the associated entity—which can be either a product, category, or CMS page—becomes active in the frontend of the store.

Custom layout update instructions consist of well-formed XML tags, without the <?xml ...> declaration and root tag. As with normal XML, every tag must either be empty or properly closed, as shown in the following examples:

```
<tag attribute="value" /> <tag attribute="value"> ... </tag>
```

<block>

Creates a new block within the current context. Layout block nesting defines the ordering of block initialization location of the blocks on the page.

Syntax

NAME	VALUE
type	 * block class path An identifier of the block class path that corresponds to the class of the block. See the list of the available block types below.
name	* block name identifier A name that can be used to address the block in which this attribute is assigned. If you create a new block with the name that is the same as one of the existing blocks, your newly created block substitutes the previously existing block. See the list of names of existing blocks below.
before	block name '-' Is used to position the block before a block with the name specified in the value. If "-" value used the block is positioned before all other sibling blocks.
after	block name '-' Is used to position the block after a block with the name specified in the value. If "-" value used the block is positioned after all other sibling blocks.
template	template filename A template filename used for the specific block type. As you have no way to see the list of template files, use whatever template value is demanded for every block type listed below.
as	block alias An alias name by which a template calls the block in which this attribute is assigned. Sometimes it's necessary to specify the alias for a specific block type.

<reference>

Changes the context for all included instructions to a previously defined block. An empty <reference> tag if of no use, because it affects only the instructions which are children.

Syntax

NAME		VALUE
name	*	block name
		A name of a block to reference.

<action>

Used to access block API, in other words, call block's public methods. It is used to set up the execution of a certain method of the block during the block generation. Action child tags are translated into block method arguments. The list of all available methods depends on the block implementation (e.g. public method of the block class).

Syntax

NAME		VALUE
method	*	block method name
		A name of the public method of the block class this instruction is located in that is called during the block generation.

<remove>

Removes an existing block from the layout.

Syntax

NAME		VALUE
name	*	block name
		The name of the block to be removed.

<extend>

This instruction performs final modifications to blocks which are already part of the layout. Every attribute in the <block> instruction—except for the block name—is subject for change. In addition, the special attribute *parent* can be used to change the parent of the block. Simply put the name of the new parent block into the <extend> instruction, and the parent of the block that is referenced will be changed in the layout.

Syntax	
NAME	VALUE
name	* block name
	The name of any block to be extended.
*	any other
	Any other attribute specific for the <block> instruction.</block>
parent	block name
	The name of the block that should become a new parent for the referenced block.
	* Indicates a required value

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

Simplified Syntax

```
?
someActionName($arg1, $arg2, ..., $argN)
```

page/template_links

Syntax

ACTION	DESCRIPTION
addLink(\$label, \$url,	<pre>\$title, \$prepare</pre>
	Adds another link to the end of the list of existing links. Just specify the <pre>\$label</pre> (link caption), <pre>\$url</pre> (link URL) and <pre>\$title</pre> (link tooltip), and you'll see a new link in the corresponding place. The <pre>\$prepare</pre> parameter must be "true" if you want the URL to be prepared, or converted to the full URL from the shortened URL. For example, the new page becomes BASE_URL/newpage if prepared.
removeLinkByUrl(\$url)	Removes a link from the block by its URL. Note that the URL must be properly specified and exactly match corresponding URL of the link you want to remove.

cms/block

Syntax

ACTION	DESCRIPTION
setBlockId(\$blockId)	Specifies the ID of a CMS block, so its content can be fetched and displayed when the page is rendered.

core/text

A core/text block can be used to enter free form text directly into the template.

Syntax

ACTION	DESCRIPTION
addText(\$textContent)	Specifies text to be rendered as the block's content. After the text is specified, the layout update instructions must continue to be a valid XML statement. If you use HTML tags as part of the text, it is recommended to use:

?
<reference name="content"></reference>
<block name="test.block" type="core/text"></block>
<action method="addText"></action>
<txt><![CDATA[<h2>ATTENTION!</h2>Check your options</td></tr><tr><td>carefully before you submit.]]></txt>

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.

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 which determine how the page is rendered. Magento supports the following page layout scenarios:

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 in the default section of the layout definition.

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.



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 control the selection of fonts, color, size, and background colors and images that appear in each section of the page. Other settings control page elements such as the logo that appears in the header, and the copyright notice in the footer. The basic page properties can be set for the following sections of an HTML page from the Admin:

- HTML Head
- Header
- Footer

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 menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
- **2.** If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
- **3.** Update the fields as needed.
- **4**. When complete, click the **Save Config** button.

ITML Head		
Favicon Icon	Allowed file types: ICO, FHO, GIF, JPC, JPEG, APHO, SVG. Not all browsers support all these formats!	STORE NEWS
Default Title	Magento Commerce	(STORE VEW)
Title Prefix		(STORE VIEW)
Title Suffix		(DTORE VIEW)
Default Description	Default Description	(STORE NEW)
Default Keywords	Magento, Varien, E-commerce	ISTORE VIEW
Default Robots Viscellaneous Scripts	NDEX, FOLLOW	(STORE VEN) (STORE VEN)
	 This will be included before head closing tag in page HTML. 	
Display Demo Store Notice	Yes	[STORE VEW]

HTML Head

FIELD	SCOPE	DESCRIPTION
Favicon Icon	Store View	Uploads the small graphic image that appears in the address bar and tab of the browser.
Default Title	Store View	The title that appears at the title bar of each page when viewed in a browser. The default title is used for all pages, unless another title is specified for individual pages.
Title Prefix	Store View	A prefix can be added before the title to create a two- or three-part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Title Suffix	Store View	A suffix can be added after the title to create a two-or three part title. A vertical bar or colon can be used as a separator at the end of the prefix to differentiate it from the text of the main title.
Default Description	Store View	The description provides a summary of your site for search engine listings and should not be more than 160 characters in length.
Default Keywords	Store View	A series of keywords that describe your store, each separated by a comma.
Default Robots	Store View	Instructions that tell search engines how to index your site. Options include: INDEX, FOLLOW NOINDEX, FOLLOW INDEX, NOFOLLOW NOINDEX, NOFOLLOW
Miscellaneous Scripts	Store View	An input box that where you can upload miscellaneous scripts to the server. For example, any third-party JavaScript that must be placed before the <body> tag, can be entered here.</body>
Display Demo Store Notice	Store View	Controls the display of the demo store notice at the top of the page. Options include: Yes / No

Header

The Header section identifies the path to the logo file, and specifies the logo alt text and welcome message.

Header			٢
Logo Image Src	images/logo.gif	[STORE VIEW]	
Logo Image Alt	Madison Island	[STORE VIEW]	
Small Logo Image Src	images/logo_small.png	[STORE VIEW]	
Welcome Text	Welcome	[STORE VIEW]	
Troidonio Text			

Header

To configure the header:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Design**.
- 3. Click to expand the **Header** section. Then, make any changes necessary.
- **4.** When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Logo Image Src	Store View	Identifies the path to the logo that appears in the header.
Logo Image Alt	Store View	The Alt text that is associated with the logo.
Small Logo Image Src	Store View	Identifies the path to a smaller version of the logo that is used with responsive themes and optimized for a small screen.
Welcome Text	Store View	The welcome message appears in the header of the page and includes the name of customers who are logged in.

Footer

The Footer configuration section is where you can update the copyright statement that appears at the bottom of the page, and enter miscellaneous scripts.

oter			
Copyright	© 2013 Madison Island. All Rights Reserved.	[STORE VIEW]	
Miscellaneous HTML		[STORE VIEW]	
	This will be displayed just before body closing tag.		

Footer Configuration

FIELD	SCOPE	DESCRIPTION
Copyright	Store View	The copyright statement that appears at the bottom of each page. To include the copyright symbol, use the HTML character entity: ©
Miscellaneous HTML	Store View	An input box where you can upload miscellaneous scripts to the server. For example, third-party JavaScript— such as an analytics tracking code—that must be placed after the <body> tag, can be entered here.</body>

Notes	



CHAPTER 37: Your Store's Theme

A theme is a collection of files that determines the visual presentation of your store. You might think of a theme as the "window dressing" of your store. When you first install Magento Community Edition, 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 Designer's Guide to Magento.

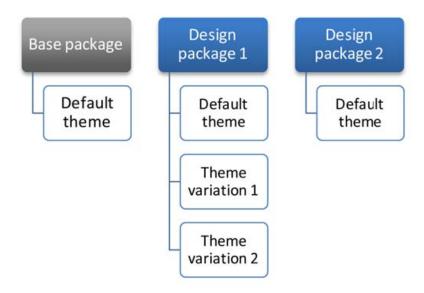
Topics in this chapter:

- Responsive Web Design
- Using the Default Theme
- Installing a New Theme

Design Packages

A design package is simply a collection of related themes. There can be any number of design packages installed, but there must always be one that serves as the base package for the installation. The base package is named "default."

Each package contains a default theme. In addition, the package might contain any number of variations of the default theme. Themes contain the files that determine the visual presentation of each page, and how the elements on the page interact with the user. Magento themes contain templating information (layout files, template files, theme-specific translation files) and skinning information (CSS files, images, and theme-specific JavaScript files). Each theme can belong to only one design package.



Packaging Variations

You can also set up exceptions to dynamically change the package when a specific user agent, such as a mobile device, tablet, or desktop browser, is detected. Exceptions can also be applied at the theme level. The names that are used to identify user agents are constantly evolving, along with the technology. You can search on the Internet for a list of user agent strings.

For an installation with multiple stores, each store in the hierarchy can have a separate theme, share the same theme, or a combination of both. The design package and theme can be assigned at either the website and/or store view level. If you assign a package at the website level, all stores in the website inherit the package. To override the default package, you can assign a different package at the store, or store view level. If no additional packages are available, the system falls back to the default package. Before a design package can be assigned, it must be copied to the server. If you purchase and install a design package or theme from Magento Connect, the necessary files are copied to your server automatically. However, it might need to update the configuration with the name of the package, theme, or both. The developer of any design package or theme typically provides specific configuration instructions.

To assign a design package:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under General, select **Design**.
- 3. Click to expand the **Package** section. Then, do the following:
 - **a.** To assign the package to a specific store view, set the Current Configuration Scope in the upper-left corner to the store view where the configuration applies. Then, clear the Use Default checkbox next to the Current Package Name field.
 - **b.** Enter the **Current Package Name** in lower-case characters.

Package			
Current Package Name	rwd	[STORE VIEW]	
	Add Exception	[STORE VIEW]	
	Match expressions in the same order as displayed in		
	the configuration.		
-			

Package

- **4.** To add an exception for a specific user agent, click the **Add Exception** button. Then, do the following:
 - **a.** In the **Matched Expression** field, enter the standard name for the user agent to be matched. For multiple entries, separate each with a vertical bar.
 - **b.** In the **Value** field, enter the name of the package to be used as the exception.
 - c. Repeat these steps to add as many exceptions as necessary.

Package			٥
Current Package Name	rwd		[STORE VIEW]
	Matched Expression Value	C Delete	[STORE VIEW]
		Add Exception	
	Match expressions in the same order as displayed in the configuration.		

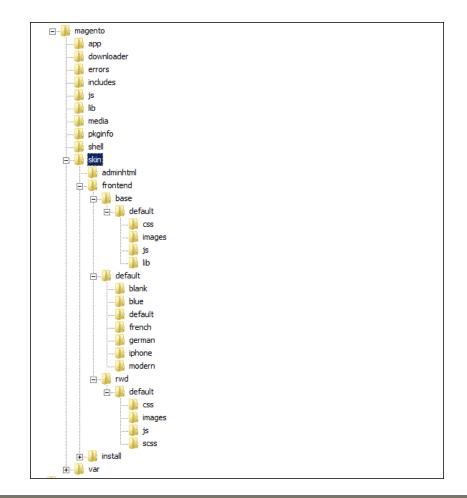
Add Exception

- 5. When complete, click the **Save Config** button.
- 6. When prompted to update the cache, click the Cache Management link and follow the instructions.

FIELD	SCOPE	DESCRIPTION
Current Package Name	Store View	The name of the design package that is used for the store. If left blank, the default package name is "default."
		A design package consists of a base theme, and any number of variant themes and associated files. The base theme and related themes contain the files that determine the visual presentation and user interaction of the store. A theme can be associated with only one design package.
		A variant theme might include only a few modified elements from the base theme. For example, you might create a special skin to use for the holiday season.
		Magento follows a fall-back model to locate the design resources and assets within the package that are needed to render a page.
BUTTONS		
Add Exception	specific user agent, such as a devi	Specifies an alternative package to be used for a specific user agent, such as a device or browser. Enter exceptions in the order that you want them to be discovered.
		For example, to use a package for the iPhone, enter an exception where the Matched Expression is "iPhone" and the Value is the name of the package to be used.
Delete		Removes an exception from the package.

Theme Assets

The assets associated with a theme are organized in the skin folder. JavaScript libraries which are shared across themes, are placed in the js/ directory at the Magento root.



FILE TYPE DESCRIPTION

CSS	Directory that contains the CSS files that control the visual styling that is associated with the skin. Location on server: [magento]/skin/frontend/[designPackage]/[theme]/css
Images	Directory that contains all images used by the theme, including buttons, background textures, and so on. Location on server: [magento]/skin/frontend/[designPackage]/[theme]/images
JS	Directory that contains theme-specific JavaScript routines and callable functions. Location on server: [magento]/skin/frontend/[designPackage]/[theme]/ja

CSS Settings

As part of an effort to optimize your site and reduce page load time, you can reduce the number of separate CSS files by merging them into a single condensed file. If you open a merged CSS file, you'll find one continuous stream of text, with line breaks removed. Because you can't edit the merged file, it's best to wait until you are out of the development mode, and no longer making frequent changes to the CSS.

To merge CSS files:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Advanced, select **Developer**.
- **3**. Click to expand the **CSS Settings** section.
- 4. Set Merge CSS Files to "Yes."

CSS Settings		٥
Merge CSS Files	No	▼ [STORE VIEW]
		CSS Settings

5. When complete, click the **Save Config** button.

JavaScript Settings

Multiple JavaScript files can be merged into a single, condensed file to reduce page load time. If you open a merged JavaScript file, you'll find one continuous stream of text, with line breaks removed. If you are finished with the development process, and the code contains no errors, you might consider merging the files.

To merge JavaScript files:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Advanced, select **Developer**.
- 3. Click to expand the JavaScript Settings section.
- 4. Set Merge JavaScript Files to "Yes."

JavaScript Settings			٥		
Merge JavaScript Files	No	×	[STORE VIEW]		
JavaScript Settings					

5. When complete, click the **Save Config** button.

Responsive Web Design

Responsive design is an approach to web page creation that flows the page layout to fit the visitor's screen size and orientation, and changes the layout accordingly. The Magento default responsive theme features style sheets that support flexibility for layouts and images, and helps provide a pleasing experience for site visitors using mobile devices. By comparison, non-responsive sites or sites not optimized for smaller screens or mobile devices are often slow or difficult to read, and offer a clunky mobile eCommerce experience.



Responsive Theme on Tablet and Smartphone

Benefits of using the Magento default responsive theme include:

- You can get a tablet and smart phone friendly responsive site in about half the time as before, speeding time to market and freeing up resources for other projects.
- Your responsive site makes you better able to participate in the fast growing mobile commerce space, and gives you the ability to create a website that is more easily adapted to new opportunities and less expensive to maintain. A responsive site also offers potential search engine optimization (SEO) benefits from using Google's preferred approach to mobile-optimizing sites.
- You no longer need to develop separate content per device. The default theme is easy to customize for simple sites, and provides a powerful starting point for developing themes for more complex sites.

To learn more about creating custom responsive themes, see the Responsive Theme Developer's Guide.

Using the Default Theme

The default Magento Community Edition theme uses Responsive Web Design (RWD) principles. Responsive web design enables you to use a single theme to present your storefront to your customers regardless of which device they use to access it. The theme is built using modern technologies and incorporates best practices for mobile sites and experiences.

Technologies used in Magento's default responsive theme include Sass/Compass and jQuery in noConflict() mode. Additional JavaScript libraries are discussed in more detail in the Responsive Theme Developer's Guide. The responsive theme code is located on the server in the following directories, relative to your Magento installation:

Code Location

app/design/frontend/rwd
skin/frontend/rwd

To view the default theme:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Design**.
- **3**. Click to expand the **Package** section. The new responsive theme is enabled by default. The default package name is "rwd."

Package		۲
Current Package Name	nvd	[STORE VIEW]
	Add Exception	[STORE VIEW]
	Match expressions in the same order as displayed in	
	the configuration.	

Default RWD Theme Package

4. Click to expand the **Themes** section. The Default theme name is "default" (although the field appears blank).

Translations		(STORE VEW)
Templates		DITORS VEW
	Ant Exception Match expressions in the same order as displayed in the configuration.	STORE VEW
Skin (Images / CSS)		(STORE VIEW)
	O Add Exception	(store vew)
Layout		ISTORE VEWI
	O AM Exception	ISTORE VEWI
Detault		(STORE VEW)
	Add Exception	(STORE VEW)

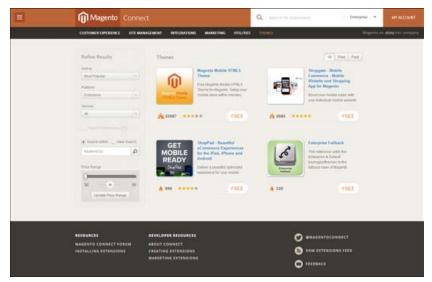
Default RWD Theme

5. When complete, click the **Save Config** button.

Installing a New Theme

When you first install Magento, the design elements of the store are based on the "Default" Theme. You can modify the theme, add themes created by others, or create new ones. To learn more, see the Designer's Guide to Magento.

Magento Connect contains hundreds of extensions, which are add-ons to Magento that can extend the functionality or enhance the appearance of your store. The following example shows how to add a mobile theme from Magento Connect.



Magento Connect

To install a new theme:

- **1.** Go to Magento Connect.
- 2. In the upper-right corner, click to extend the All Platforms list, and choose Enterprise
- **3.** You can browse through the available themes based on price or popularity, or do a keyword search. For more information, click the thumbnail of any theme.
- **4.** To get the registration key, you must be a registered Magento Community Edition owner and be logged into your account. Then, click the **Install Now** button to get the license key.



Install Now

5. To complete the process, follow the instructions to install an extension from Magento Connect.

To activate the theme for your store:

- 1. On the Admin menu, select **System > Configuration**. In the panel on the left, under General, select **Design**.
- 2. Click to expand the **Themes** section. Then, do the following:

Translations		[STORE VEW]	
Templates		[STORE VIEW]	
	Add Exception Match expressions in the same order as displayed in the configuration.	DETORE VIEW	
Skin (Images / CSS)		[store view]	
	C Add Exception	[STORE VEW]	
Layout		[STORE VIEW]	
	Add Exception	ISTORE VIEW]	
Default	mds	ISTORE VEW)	
	O Add Exception	[STORE VIEW]	

- **3.** In the **Default** field, enter the name of the theme. The name of the Magento demo store theme is "mds."
- 4. If you want to use an alternate them for different browsers or devices, do the following:
 - a. Click the Add Exception button.

The Add Exception button is used to use a different theme for specific browsers. For example, a theme that is optimized for mobile can be used whenever a mobile device is detected.

bornes		
Translations		ESTORE VEW)
Templates		(STORE VEW)
	Add Exception Mach expressions in the same order as displayed in the configuration.	ISTORE VIEW]
Skin (Images / CSS)		[STORE VEW]
	Add Exception	(STORE VEW)
Layout		[STORE VEW]
	O Add Exception	ISTORE VIEW]
Default	mds	ISTORE VIEW)
	Matched Expression Value	(STORE VEW)
	AndrioldjBlackberry(Gr mobile	O Delete
		Add Exception

Add Exception

b. In the **Matched Expression** field, enter the name of the browser or device that triggers the use of the alternate theme. If there are multiple browsers, separate the name of each with a vertical bar. For example, because the mobile theme can be used with multiple devices, you can enter them all in the Match Expression field, as follows:

```
Android|Blackberry|Googlebot-Mobile|iPhone|iPod|mobi|Palm|Opera
Mini|Windows Mobile
```

- c. In the Value field, enter the name of the theme. In this example, the value is "Mobile."
- 5. Click the **Save Config** button on the top right of the page.
- **6.** Test the new theme from your store. If you installed an exception for different browsers, view the store with each browser or device.

If the new theme uses a different page layout than your current home page, you might need to change its page layout setting to match the theme.

FIELD	SCOPE	DESCRIPTION
Translations	Store View	Identifies the theme that contains the translation data for this store view.
Templates	Store View	Identifies the theme that contains the templates used for this store view.
Skin (Images/ CSS)	Store View	Identifies a theme variation that is applied to this store view.
Layout	Store View	Identifies the theme that determines the layout of this store view.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Default	Store View	Identified the theme that is used as the default for this store view.
BUTTONS		
Add Exception		Specifies an alternative theme to be used for a specific device.
		For example, to use the iPhone theme you can add a theme exception where the Matched Expression is "iPhone" and the Value is the name of the theme to be used.
Delete		Deletes the exception.

Changing UI Text

You can use the Translate Inline tool to touch up the text in the interface to reflect your voice and brand. If your store is available in multiple languages, you can make fine adjustments to the translated text for the locale. It's easy to edit field labels, messages, and other text that appears throughout the storefront and Admin.

For example, many themes use terminology such as "My Account," "My Wishlist," and "My Dashboard," to help customers find their way around. However, you might prefer to simply use the words "Account," "Wishlist," and "Dashboard."

When the Translate Inline mode is activated, all text on the page that can be edited is outlined in red. To use the Inline Translator without disrupting the shopping experience of customers in the store, add your IP address to the Developer Client Restrictions whitelist.

On the server, interface text is maintained in a separate CSV file for each output block, and organized by locale. As an alternate approach, the CSV files can be edited and updated on the server.

Make sure that your browser is set to allow pop-ups.

Step 1: Disable Output Caches

- 1. On the Admin menu, select System > Cache Management.
- **2.** Select the following checkboxes:
 - Blocks HTML output
 - Translation
- **3.** Set the **Actions** control to "Disable." Then, click the **Submit** button.

Dashboard Sales	Catalog Custo	ners Pronotions Newsletter CMII Reports Fysiem	Disabl	e ter this par
Cache Stopane M	an anomant.	7	10 1945	ter Storage
Select All (Line	Select	name (2 terms selected	Actors	
Cathe Type	Checkbox		Associated Tags	Stature
Configuration		mi, local xmi) and modules configuration files(config xml).	CONFIG	ENAGEID
Layouts	Cayou Sul	ong instructions.	LAYOUT_GENERAL_CACHE_T	AG ENABLED
Blocks HTML output	Page block	s HTML	BLOCK_HTML	ENABLED
Translations	Translation	ties.	TRANSLATE	ENADLED
Collectore Data	Collection	data Nes.	COLLECTION_DATA	INMILED
EAV types and attribut	es Entity type	s declaration cache.	EAV	ENABLIE
Web Services Configu	ration Web Servis	ces definition files (api ami).	CONFIG_API	C INMETE -
Web Services Configu	ration Web Service	ces definition files (api2 xml)	CONFIG_API2	INALLE

Disable Output Caches

Step 2: Activate the Translate Inline Tool

- 1. On the Admin menu, select **System > Configuration**.
- **2.** To work with a specific store view, set **Current Configuration Scope** to the store view to be updated.
- 3. In the panel on the left under Advanced, select **Developer**.
- 4. Click to expand the **Translate Inline** section. Then, do the following:
 - a. Set Enabled for Frontend to "Yes."

For a specific store view, you must first clear the **Use Website** checkbox. The Enabled for Admin option is not available when editing a store view.

Translate Inline		٥
Enabled for Frontend	No [STORE VIEW]	
Enabled for Admin	No [GLOBAL] A Translate, blocks and other output caches should be disabled for both frontend and admin inline translations.	

Translate Inline

5. When complete, click the **Save Config** button.

Step 3: Update the Text

1. Open your storefront in a browser, and go to the page that you want to edit. If necessary, select the store view from the language switcher in the upper-left corner.

Each string of text that can be translated is outlined in red. When you hover over any text box, a book icon in appears.



Translatable Text

- 2. Click the book icon 🧾 to open the Translation window. Then, do the following:
 - **a.** If the change is for a specific store view, select the **Store View Specific** checkbox.
 - **b.** Enter the **Custom** text.
 - **c.** Click the **Submit** button.

supportantly that is a	riginal: ranslated:	Search entire store here Search entire store here	
Store View Specific: Custom:			WELCOME
		Search store	In the local division of the
Mag Mag	Par	ee reflesh the page to see your changes after submitting this form.	Store Here Q
WOMEN			

Enter Custom Text

- 3. To see your changes in the store, press the **F5** key to refresh the browser.
- 4. Repeat this process for any elements in the store to be changed.

Step 3: Restore Original Settings

- 1. On the Admin menu, select **System > Developer**.
 - a. In the panel on the left under Advanced, select **Developer**.
 - **b.** Click to expand the **Translate Inline** section.
 - a. Set Enabled for Frontend to "No."
 - **b.** Click the **Save Config** button.
- 2. On the Admin menu, select **System > Cache Management**. Then, do the following:
 - **a.** Select the following checkboxes:
 - Blocks HTML output
 - Translation
 - **b.** Set the **Actions** control to "Enable." Then, click the **Submit** button.

	Magento Admin P	anel	Global Record Search	Logged in as admin Seturda	, May 2, 2015 LINEG
1	behood Sees Cate	og Customens Promotions Newsietter CMS	Reports System	đ	Get help for this pag
	Cache Storage Manager	ment		O Flosh Magento Cache	Flish Cache Slorage
	and Mary Languages and a Stationary	fulle (Linuter fields / 2 Items selected		Actions	atin 🖌 Sabaut
	Cache Type	Description		Associated Tags	Statute
	Configuration	System(config.xml, local.xml) and modules configuration file	siconfig.xml).	CONFIG	ENALLER
	Layouts	Layout building instructions.		LAYOUT_DENERAL_CACHE_TAD	ENMILLER
1	Blocks HTML output	Page blocks HTML		BLOCK_HTML	DISABLEE
2	Translations	Translation files.		TRANSLATE	DISAILED
	Collections Data	Collection data files.		COLLECTION_DATA	ENABLIE
	EAV types and attributes	Entity types declaration cache.		EAV	ENABLED
	Web Services Configuration	Web Services definition files (api.xml)		CONFIG_API	ENANCES
	Web Services Configuration	Web Services definition files (api2 sml)		CONFIG API2	ENANCED

Enable Output Caches

FIELD	SCOPE	DESCRIPTION
Enable for Frontend	Store View	Activates the Inline Translator for the storefront. The interface text can be edited for each store view.
		To use the Inline Translator without interfering with the live store, add your IP address to the Developer Client Restrictions whitelist.
Enable for Admin	Global	Activates the Inline Translator for the Admin. Unlike the storefront, the Admin cannot be translated into multiple languages. However, the field labels and other text in the interface can be changed.

Notes	



Customers

In this section...

Customer Accounts

Customer Groups



CHAPTER 38: 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.

Ability to Self-Serve

Registered customers can update their information, check the status of orders, and even reorder from their account dashboard.

Account Configuration

The customer account settings determine the information that you collect during customer registration, and the experience customers have during the process.

Topics in this section include:

- Account Scope
- Login Landing Page
- Basic Account Options
- Name and Address Options
- Password Options

Customer Account Scope

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

To set the scope of customer accounts:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- 3. Click to expand the Account Sharing Options section.

Account Sharing Options			٥
Share Customer Accounts	Per Website	[GLOBAL]	
	Account Sh	aring Options	

4. Set Share Customer Accounts to one of the following:

Global	To share customer account information with every website and store in
	the Magento installation.

- Per Website To limit customer account information to the website where the account was created.
- 5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTIO	N
Share Customer Accounts	Global		scope of customer accounts in hy. Options include:
		Global	Customer account information is shared with every website and store in the Magento installation.
		Per Website	Customer account information is limited to the website where the account was created.

Login Landing Page

Depending on the configuration, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts.

edirect Customer to Account	Yes	▼ [WEBSITE]	
ashboard after Logging in	Customer will stay on the current page if "No" is		
donoodid altor Logging III	selected.		

To set the login landing page:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- **3**. Click to expand the **Login Options** section.
- 4. Set Redirect Customer to Account Dashboard after Logging in to one of the following:
 - Yes The account dashboard appears when customers log in to their accounts.
 - No Customers can continue shopping after logging in to their accounts.
- **5**. When complete, click the **Save Config** button.

Basic Account Options

In the customer configuration, the basic account options are combined with advanced options related to VAT ID Validation. The following instructions show how to complete only the basic customer account options, which are highlighted in the following screenshot. To learn about the advanced options, see: VAT ID Validation.

Steate New Account Options			
Enable Automatic Assignment to Customer Group	No = To shaw VAT number on Bortland, set Shaw VAT Number on Promised option to Yes	•	Taxania were
Default Group	General	۲	Texcest netwo
Default Value for Disable Automatic Group Changes Based on VAT ID	Pes	*	lorgest
Show VAT Number on Frontend	No	Ŧ	potenting
Default Email Domain	example.com		(STORE VIEW)
Default Welcome Email	New account (Default Template from Locale)	٠	[STORE VEW]
Email Sender	General Contact	٠	ISTORE VIEW
Require Emails Confirmation	No	٠	(WEBSITE)
Confirmation Link Email	New account confirmation key (Default Templa	٠	(STORE VIEW)
Welcome Email	New account confirmed (Default Template from > This email will be sent instead of default velocine en after account confirmation.		Increase valued
Generate Human-Fiberidly Customer ID	(NU	•	loroset3

Create New Account Options

To set up the basic customer account options:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- 3. Click to 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.
 - 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 **Email Sender** to the store contact that appears as the sender of the Welcome email.
 - e. To require that customers must 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.
 - **f.** Set **Welcome Email** to the template that is used for the Welcome message that is sent after the account is confirmed.
- 4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Default Group	Store View	Identifies the initial customer group assigned when an account is created.
Default Email Domain	Store View	Identifies the default email domain for the store. For example: mystore.com
Default Welcome Email	Store View	Identifies the email template used for the default Welcome email.
Email Sender	Store View	Identifies the store contact that appears as the sender of the Welcome email.
Require Emails Confirmation	Website	Determines if a request to create an account requires confirmation from the customer.
Confirmation Link Email	Store View	Identifies the email template that is used for the confirmation email. Default template: New account confirmation key
Welcome Email	Store View	Identifies the email template that is used for the Welcome message that is sent after the account is confirmed.

Name and Address Options

The fields that are included in the customer registration form, and the format of the street address are set in the Customer Configuration. When all fields are used, the registration form includes the full name, including the middle initial, with drop-down lists for the prefix and suffix. The registration form can also include the date of birth, gender, and Tax ID or VAT number.

To configure the customer name and address:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customer, select **Customer Configuration**.
- 3. Click to expand the Name and Address Options section.
- Enter the Number of Lines in a Street Address. If left blank, the street address defaults to 2.
- 5. To include a prefix before the name, do the following:
 - a. Set Show Prefix to one of the following:

- Optional
- Required
- **b.** In the **Prefix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
- 6. To include a suffix after the name, do the following:
 - a. Set **Show Suffix** to one of the following:
 - Optional
 - Required
 - **b.** In the **Suffix Dropdown Options** field, enter each prefix that you want to appear in the list, separated by a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
- **7.** To include additional fields, do the following:
 - a. Set Show Date of Birth to "Yes."
 - b. Set Show Tax/VAT Number to "Yes."
 - c. Set Show Gender to "Yes."
- 8. When complete, click the **Save Config** button.

Name and Address Options		٥
Number of Lines in a Street Address	2 A Leave empty for default (2). Valid range: 1-4	[WEBSITE]
Show Prefix	No The title that goes before name (Mr., Mrs., etc.)	[WEBSITE]
Prefix Dropdown Options	Semicolon (;) separated values. Put semicolon in the beginning for empty first option.	[WEBSITE]
Show Middle Name (initial)	Leave empty for open text field. No Always optional. 	[WEBSITE]
Show Suffix	No The suffix that goes after name (Jr., Sr., etc.)	[WEBSITE]
Suffix Dropdown Options	▲ Semicolon (;) separated values. Put semicolon in the beginning for empty first option. Leave empty for open text field.	[WEBSITE]
Show Date of Birth	No	[WEBSITE]
Show Tax/VAT Number	No	[WEBSITE]
Show Gender	No	[WEBSITE]

Name and Address Options

FIELD	SCOPE	DESCRIPTION
Number of Lines in a Street Address	Website	Determines the number of lines in the street address. The street address consists of one to four lines. If the field is blank, the default street address of two lines is used.
Show Prefix	Website	Determines if the customer name includes a prefix at the beginning, such as Mr., Mrs., and so on. Options include: No Optional Required
Prefix Dropdown Options	Website	Defines the list of prefix options. Separate values with a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
Show Middle Name (initial)	Website	Determines if the middle initial is included as part of the customer name. When used, the middle initial is not a required field. Options include: Yes / No
Show Suffix	Website	Determines if the customer name includes a suffix at the end, such as Jr., Sr., III, and so on. Options include: No Optional Required
Suffix Dropdown Options	Website	Defines the list of suffix options. Separate values with a semicolon. Place a semicolon before the first value to display an empty value at the top of the list.
Show Date of Birth	Website	Determines if the customer date of birth is included in the name and address form. Options include: No Optional Required

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Show Tax/VAT Number	Website	Determines if the Tax or VAT number is included in the name and address form. Options include:
		No
		Optional
		Required
Show Gender	Website	Determines if gender is included in the name and address form.
		Options include:
		No
		Optional
		Required

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 menu, select **System > Configuration**.
- 2. In the panel on the left under Customers, select **Customer Configuration**.
- 3. Click to expand the **Password Options** section. Then, do the following.
 - **a.** Set **Forgot Email Template** to the template that is used for the email sent to customers who have forgotten their passwords.
 - **b.** Set **Remind Email Template** to the template that is used when a password hint is sent to customers.
 - **c.** Set **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, click the **Save Config** button.

Password Options		•
Forgot Email Template	Forgot Password (Default Template from Locale)	[STORE VIEW]
Remind Email Template	Remind Password (Default Template from Locale	[STORE VIEW]
Forgot and Remind Email Sender	Customer Support	[STORE VIEW]
Recovery Link Expiration Period (days)	1 ▲ Please enter a number 1 or greater in this field.	[GLOBAL]
Require admin user to change user password	Yes	[GLOBAL]

Password Options

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Forgot Email Template	Store View	Identifies the email template that is used when customers forget their passwords. Default template: Forgot Password
Remind Email Template	Store View	Identifies the email template that is used when customers receive a password reminder, or hint. Default template: Remind Password
Forgot and Remind Email Sender	Store View	Determines the store contact that appears as the sender of the Forgot and Remind Password emails.
Recovery Link Expiration Period (days)	Global	Specifies the number of days before a password recovery link expires.
Require admin user to change user password	Global	Determines if customers can change their own passwords, or if a store administrator must make the change. Options include: Yes / No

Changing the Welcome Message

The "Welcome" message in the upper-left corner expands to include the name of customers who are logged in. You can change the text for each store or store view.

M M	agente	n*				CART
I M	agenu	5			Welcome Message	9
WOMEN	MEN	ACCESSORIES	HOME & DECOR	SALE VIP		1

To change the welcome message:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under General, select **Design**.
- **2.** If you have multiple stores or views, set the **Current Configuration Scope** in the upper-left corner to the store or view where the configuration applies. Then, clear the checkbox after each field so new values can be entered.
- **3.** Click to expand the **Header** section.
- 4. In the Welcome text box, enter the text that you want to appear in the header,

Header			
Logo Image Src	images/logo.gif	[STORE VIEW]	
Logo Image Alt	Madison Island	[STORE VIEW]	
Small Logo Image Src	images/logo_small.png	[STORE VIEW]	
Welcome Text	Welcome	[STORE VIEW]	

Welcome Text

- 5. When complete, click the **Save Config** button.
- **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.

Customer Account Login

Customer have easy access to their accounts from every page in your store. Depending on the configuration, customers can be redirected to their account dashboard, or continue shopping after they log in to their accounts. When customers forget their passwords, a reset link is sent to the email address that is associated with the account.

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Account Login

To log in to your customer account:

- **1.** From the header of your store, click the **Log in** link.
- 2. When prompted, enter the **Email Address** that is associated with your account, and your **Password**. Then, click the **Log In** button.

To reset your password:

- 1. From the Login page, click the Forgot Your Password? link.
- 2. When prompted, enter the **Email Address** that is associated with your account, and click the **Submit** button.

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. Click the link in the email, and when prompted, enter your **New Password**. Enter it again to confirm, and click the **Reset a Password** button.

Your new password must be six or more characters in length, without spaces.

After you are notified that the password has been updated, you can use the new password to log in to your account.

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.

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Account Dashboard

Account Information

Customers can update their account information and change their password, as needed.

Address Book

The customer address book includes the default billing and shipping address, and additional address entries.

My Orders

Displays a list of all customer orders, with a link to each. If enabled in the configuration, any order can be reordered by simply clicking the Reorder link.

Billing Agreements

Displays a list of any customer billing agreements.

Recurring Profiles

Displays a list of any products that are purchased on a recurring basis, as a subscription.

My Product Reviews

Displays a list of all product reviews submitted by the customer, with a link to each.

My Wishlist

Displays the customer's wishlist. Products from the wishlist can be added to the cart.

My Applications

This section is a placeholder for API applications that link the customer account to other applications or extensions.

Newsletter Subscriptions

Lists all available newsletters,. Those to which the customer is currently subscribed have a checkmark.

My Downloadable Products

Lists all downloadable products the customer has purchased, with a link to each.

Notes



CHAPTER 39: Customer Groups

The customer group determines which discounts are given to a customer, as defined by price rules, and the tax class that is associated with the group. The default customer groups are General, Not Logged In, and Wholesale.

In this chapter:

• Creating a Customer Group

Creating a Customer Group

Customer groups can be referenced in promotional price rules and associated with specific tax classes. Follow these steps to create the customer groups you need for your store.

To create a customer group:

1. On the Admin menu, select **Customers > Customer Groups**.

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Customer Groups

- 2. To create a new group, click the Add New Customer Group button. Then, do the following:
 - **a.** Enter a unique **Group Name** to identify the group from the Admin. The name must be less than 32 characters.
 - **b.** Select the **Tax Class** that applies to the group.

Group Information	
Group Name *	
Tax Class *	Retail Customer 🔻

Group Information

3. When complete, click the **Save Customer Group** button.

To edit a customer group:

- 1. On the Admin menu, select **Customers > Customer Groups**.
- **2.** In the list, click to open the record.
- **3.** Make the necessary changes.
- 4. When complete, click the **Save Customer Group** button.



Sales & Orders

In this section...

Managing Orders

Assisted Shopping

Order Fulfillment

Store Credit & Refunds

Sales Document Setup



CHAPTER 40: Managing Orders

In this chapter , we explore what happens after a customer places an order, and the time the order is delivered. You will learn how to offer shopping cart assistance, fulfill orders, print invoices, collect payment, process credit memos, manage returns, and more.

Topics in this chapter:

- Order Process Overview
- Order Stages
- Guest Checkout
- Minimum Order Amount
- Terms and Conditions

Additional Resources Consumer Attitudes on Shopping Cart Abandonment Increasing Average Order Value

Order Process Overview

Order Submitted

During checkout, the customer reviews the order, agrees to the Terms and Conditions, and clicks the Place Order button. Customers receive a confirmation of their orders, with a link to their customer account.

Order "Pending"

Before payment is processed the status of a sales order is "Pending." At this point, the order can still be canceled.

Payment Received

Depending on the payment method, you, may be notified when the transaction is authorized and in some cases, processed. The status of the invoice is now "Processing."

Order Invoiced

Sometimes an order is invoiced before payment is received. In this example, the invoice is generated and submitted after the credit card payment has been authorized and processed. After the invoice is generated and submitted, a copy is sent by email to the customer.

Order "Processing"

When the customer logs into his account to check on the order, the status is still "Processing."

Order Shipped

The shipment is submitted, and packing slips printed. You ship the package, and the customer is notified by email. Congratulations! You're in business.

Order Stages

The Sales menu lists transactions according to where they are in the order workflow. You might think of each of these as a possible stage in the life of an order.

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Orders

When an order is created, either from the storefront or in the Admin, a sales order is created as a temporary record of the transaction. Sales orders can be seen from the Admin by selecting the Orders option from the Sales menu. Payment has not yet been processed and the order can still be canceled.

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Invoices

An invoice is a record of the receipt of payment for an order. Creating an invoice converts the temporary sales order into a permanent record of an order, which can no longer be canceled. Multiple invoices can be created for a single order, each containing as much 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.

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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.

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Credit Memos

A credit memo is a record of a refund. A product cannot be refunded until it has been paid (which means that it has been invoiced). This means that you are not able to create a credit memo before an invoice has been created. The credit memo serves as a record of a refund, but it is not a record of the actual return of funds to the customer.



Transactions

The Transactions page lists all payment activity that has taken place between your store and a payment system, and provides access to more detailed information.

Guest Checkout

Your store can be configured to require that customers open an account before making a purchase, or to allow unregistered guests to go through checkout.

To allow guest checkout:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Sales, select **Checkout**.
- 3. Click to expand the **Checkout Options** section.
- 4. Set Allow Guest Checkout to "Yes."

Checkout Options				٥
Enable Onepage Checkout	Yes	•	[STORE VIEW]	
Allow Guest Checkout	Yes	'	[STORE VIEW]	
Enable Terms and Conditions	Yes	•	[STORE VIEW]	

Checkout Options

5. Click the **Save Config** button.

Minimum Order Amount

Order subtotals can be required to meet a minimum amount, after any discounts have been applied. Orders shipped to multiple address can be required to meet the minimum order amount per address. The Proceed to Checkout button becomes available only when the minimum order amount is reached.

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Default Minimum Order Message in Shopping Cart

To configure the minimum order amount:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Sales**.
- 3. Click to expand the Minimum Order Amount section. Then, do the following:
 - a. To require a minimum order amount, set Enable to "Yes."
 - **b.** Enter the **Minimum Amount** required for the subtotal, after discounts are applied.
 - **c.** To display a message at the top of the shopping cart that differs from the default, enter the text in the **Description Message** box. Leave blank to use the default message.
 - **d.** To display an error message that differs from the default, enter the text in the **Error to Show in Shopping Cart** box.
 - e. To require that each address in a multi-address order meet the minimum order amount, set Validate Each Address Separately in Multi-address Checkout to "Yes."
 - **f.** To display a message at the top of the shopping cart that differs from the default for orders shipped to multiple addresses that do not meet the minimum order requirement, enter the test in the **Multi-address Description Message** box.

- **g.** To display an error message that differs from the default for orders shipped to multiple addresses that do not meet the minimum order amount, enter the text in the **Multi-address Error to Show in Shopping Cart** box.
- 4. When complete, click the **Save Config** button.

nimum Order Amount		
Enable	No	[WEBSITE]
Minimum Amount		[WEBSITE]
	▲ Subtotal after discount.	
Description Message		[STORE VIEW]
	This message will be shown in shopping cart when subtotal after discount less than minimum amount.	
Error to Show in Shopping Cart		[STORE VIEW]
ind to onew in onepping cart		[orona man]
Validate Each Address Separately in Multi-address Checkout	No	[WEBSITE]
Multi-address Description Message		[STORE VIEW]
2		
	▲ If empty, the default description above will be used.	
Multi-address Error to Show in Shopping Cart		[STORE VIEW]

Minimum Order Amount

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable	Website	Determines if a minimum order amount is set for the site. Options include: Yes / No
Minimum Amount	Website	Specifies the minimum subtotal, order after discounts are applied.
Description Message	Store View	Determines the message that appears at the top of the shopping cart when the cart total is less than the minimum order amount. If left blank, the following default message appears: Minimum order amount is \$[minimum_amount]
Error to Show in Shopping Cart	Store View	Determines the message that appears from the mini shopping cart or checkout link when the order amount is less than the minimum order amount required. If left blank, a default message appears.
Validate Each Address Separately in Multi- address Checkout	Website	For multi-item orders, determines if order items going to separate addresses much meet the minimum order amount. Options include: Yes / No
Multi-address Description Message	Store View	For multi-address orders, determines the message that appears in the shopping cart if the items sent to an address are less than the minimum order amount.
Multi-address Error to Show in Shopping Cart	Store View	For multi-address orders, determines the message that appears from the mini shopping cart or checkout link when the order amount is less than the minimum order amount required. If left blank, a default message appears.

Terms and Conditions

When Terms and Conditions are enabled, customers must select a checkbox to verify that they agree to the terms and conditions of the sale. The Terms and Conditions message and checkbox appear during Order Review between the Totals section and the Place Order button. The transaction cannot be finalized until the customer selects the checkbox to agree to the terms and conditions of the sale.

PRODUCT	PRICE	OTY	SUBTOTAL:	Calver City, California, 90232 United States T: 888-888-8888
HERALD GLASS VASE	\$110.00	4	\$110.00	SHIPPING METHOD (CHANGE The Shipping - Free #0.00
ANN ANKLE BOOT	\$470.00	1	\$470.00	PAYMENT METHOD CHANGE
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BLUE HORIZONS BRACELETS	\$115.00	+	\$115.00	
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Terms and Conditions of Sale These Terms and Conditions May Clung My Company reserves the right to updat time without prior notice.	e te or modilly these Terms and Conditions at an	-		
III. I agree to these terms.				

Terms and Conditions at Checkout



Step 1: Enable Terms and Conditions

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Checkout**. Then, click to expand the **Checkout Options** section.
- **3.** Make sure that **Enable Onepage Checkout** is set to "Yes." Otherwise, the Terms and Conditions checkbox will not appear during checkout.
- **4.** To display the terms and conditions checkbox during checkout, set **Enable Terms and Conditions** to "Yes."
- 5. When complete, click the **Save Config** button.

Checkout Options			
Enable Onepage Checkout	Yes	T	[STORE VIEW]
Allow Guest Checkout	Yes	۲	[STORE VIEW]
Enable Terms and Conditions	Yes	٣	[STORE VIEW]

Checkout Options

Step 2: Describe Your Terms and Conditions

- 1. On the Admin menu, select **Sales > Terms and conditions**.
- 2. In the upper-right corner, click the Add New Condition button.
- **3.** In the Terms and Conditions Information section, complete the following:

Condition Name*	My Company Terms and Conditions of	f Sale	
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Contant *	These Terms and Conditions May Cha My Company reserves the right to add Governing Terms All products and services offlered for so the sale of the products and/or environ- attached or incorporated by reference, conditions attached to un contained to products or services delivered by My G services. THE TERMING OF THIS CONT.	ale or modify these ale by My Company is described in the fi Except as express thin, Buyet's reque Company shat cont TRACT SHALL SUM	Terms and Conditions all any time without prior values Soc. (No. Consearch) was not supported to the terms and conditions stated hower. These terms and conditions all apply to Consect Destroy the Society of the Society of Conditions of the Society of the Society of the Society of the Society of the Society of Conditions of the Society of the Society of the Society of the Society of the Society of Conditions of the Society of the Society of Conditions of the Society of Conditions and Society and Society of the Society of Conditions of the Society of Conditions of the Society of Conditions and Society of the Society of Conditions of the Society of Conditions of Conditions of Conditions and Society of the Society of Conditions of Conditions of Conditions of Conditions of Conditions and Society of the Society of Conditions of Conditio

Terms and Conditions Information

- **a.** Enter the **Condition Name**. The name is for internal reference only.
- b. Set Status to "Enabled."

Step 3: Format the Content

- **1. Set Show Content as** to one of the following:
 - Text Displays the terms and conditions content as unformatted text.
 - HTML Displays the terms and conditions content as HTML, which can be tagged and formatted.
- 2. Identify the **Store View** where the Terms and Conditions will appear.

- **3.** Enter the **Checkbox Text** that you want to appear as a label with the checkbox. For example, you could use "I understand and accept these terms and conditions of the sale."
- **4.** In the **Content** field, either type or paste enter the full text of the terms and conditions of the sale.
- **5.** (Optional) Enter the **Content Height (css)**, in pixels, to determine the height of the text box in which the terms and conditions statement appears during checkout. For example, if you want the text box to be one inch high, enter 96, which is the equivalent value in pixels.
- 6. When complete, click the **Save Condition** button.

Setting Up Sales Email

A number of transactional email messages are triggered by events related to an order, and the configuration is similar for each. You must identify the store contact that appears as the sender of the message, the email template to be used, and who else is to receive a copy of the message.

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Web	Shipment Comments				•
Design	Credit Memo				•
Currency Setup	Credit Memo Comments				•
Store Email Addresses					
Contacto					
Reports					
Content Management					

Sales Email Configuration

Step 1: Update the Email Templates

Make sure that you have updated each email template configuration with your store logo, and have made any other changes necessary to the content of each template to reflect your store and brand. For a complete list of templates, see: Email Template Reference.

Step 2: Configure the Sales Emails

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Sales, select **Sales Emails**. Then, do the following:
- 3. Click to expand the **Order** section. Then, do the following:

- 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.

Order		٩
Enabled	Yes 🔻	[STORE VIEW]
New Order Confirmation Email Sender	Sales Representative	[STORE VIEW]
New Order Confirmation Template	New Order (Default Template from Locale)	[STORE VIEW]
New Order Confirmation Template for Guest	New Order for Guest (Default Template from Lc 🔻	[STORE VIEW]
Send Order Email Copy To	▲ Comma-separated.	[STORE VIEW]
Send Order Email Copy Method	Bcc •	[STORE VIEW]

Order

- 4. Click to expand the Order Comments section, and repeat these steps.
- **5.** Complete the configuration in a similar manner for the remaining sales emails:
 - Invoice
 - Shipment
 - Credit Memo
- 6. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION		
Enabled	Store View	,	ls a transactional email for Options include: Yes / No	
New Order Confirmation Email Sender	Store View	Identifies the store c message sender. Op General Contact Sales Representativ Customer Support Custom Email 1 Custom Email 2		
New Order Confirmation Template	Store View	Identifies the template that is sent to confirm new orders placed by customers. Default template: New Order		
New Order Confirmation Template for Guest	Store View	Identifies the template that is sent to confirm new orders placed by guests. Default template: New Order for Guest		
Send Order Email Copy To	Store View	Provides the email address of anyone to receive a copy of an order email. Separate multiple addresses with a comma.		
Send Order Email Copy Method	Store View	Indicates the email n copy. Options includ	nethod used to send the le:	
		Всс	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.	

Notes	



CHAPTER 41: Assisted Shopping

Customers sometimes need assistance to complete a purchase. Some customers like to shop online, but would rather the order by phone. While you're on the phone, the customer might decides to take advantage of a coupon. To complete the sale, you must know how to edit the contents of the shopping cart, apply the discount from the coupon, and complete the order from the Admin—all while the customer is on the phone. No problem!

You can offer immediate shopping cart assistance to any customer who has registered for an account with your store. The Manage Shopping Cart tool gives you the ability to edit the contents of the customer's shopping cart in real time, from the Admin of your store.

Topics in this chapter:

- Update a Cart
- Create a New Order
- Create a Customer Account
- Update an Order
- Persistent Shopping Cart

Customer Service reps can see the contents of a customer's shopping cart while the customer is on the phone, and the changes can be seen by the customer immediately after the page is refreshed.

Online Customers

You can see who's online in your store at any given time, and examine the contents of the customer's shopping cart, past purchases, and recent activity.

The length of the online session is set in the configuration, and determines how long the customer is visible from the Admin. By default, the online session is set to fifteen minutes.

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Online Customers

To configure the session length:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- 3. Click to expand the Online Customers Options section.
- **4.** In the **Online Minutes Interval** field, enter the number of minutes before the online session expires. You can leave the field empty to accept the default of fifteen minutes.



5. When complete, click the **Save Config** button.

To see customers online:

- 1. On the Admin menu, select **Customers > Online Customers**.
- 2. In the list, click the customer record to view the customer information.
- **3.** To see the contents of the customer's shopping cart, click to expand the **Shopping Cart** section.

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Customer's Shopping Cart

Update a Shopping Cart

To begin an assisted shopping session, the customer must be logged into the account dashboard, so that the information is available. If the customer doesn't have an account, you can create one. What service!

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Apply Coupon and Update Qty

To offer assisted shopping:

- 1. On the Admin menu, select **Customers > Online Customers**.
- 2. In the list, click to open the customer record in edit mode.

When the customer record opens, the first thing you'll notice is that the Last Logged In value is "(Online)."

3. In the panel on the left, select **Shopping Cart**. Then, click the **Manage Shopping Cart** button to enter assisted shopping mode.

To apply a coupon code:

- 1. In the Apply Coupon Code section, enter the **Code**.
- **2.** Click the **Apply** button.

To adjust the quantity ordered:

- 1. In the **Qty** column of the product to be adjusted, enter the correct amount.
- 2. Click the Update Items and Qty's button.

To add products to the shopping cart:

- 1. Click to expand the **Products** section. In the **Qty to Add** column, enter the quantity of the product the customer wants to order.
- **2.** If the product is configurable, click the **Configure** link. Then, select the options the customer wants, and click the **OK** button.

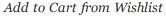
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Configure Product Options

To transfer products from a wishlist:

- **1.** Click to expand the Wishlist section.
- **2.** By default, it is set to transfer all items in the wishlist. If there are multiple items, select the checkbox of the items that you do not want to transfer, and set **Qty to Add** to 0.

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Weblet name	Product name				Gty To Ad	
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Cocs Puff's Wedding	Body Wash with Lemon Flower Extract and Aloe Vera		\$25.00	2	0	
Wishest	Racer Back Mari Dress	Contaura	\$290.00	10	1	



Customer service reps can remove items from a cart by setting the quantity to 0 and updating the cart. However, only the customer can move items from the cart to the wishlist or to the product compare list.

3. Follow the same procedure to add items from the remaining sections:

- Products in Comparison List
- Recently Compared Products
- Recently Viewed Products
- Last ordered items
- 4. When complete, click the Add Selected Products to the Shopping Cart button.
- 5. Ask the customer to press F5 to refresh the page, so the products appear in the cart.

At this point, the customer can continue shopping and checkout unassisted, or have the customer service representative create the order.

6. To create an order, click the **Create Order** button, and follow the normal process to complete the order for the customer.

Create an Order

For registered customers who need assistance, you can create an entire order directly from the Admin. The Create New Order form includes all the information that is needed to complete the normal checkout process, with activity summaries from the customer's account dashboard.

For existing customers, new orders can be created both from the Manage Customer page and from the Sales Order page. The Sales Order page can also be used to open accounts for new customers.

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Create Order

Process Overview: Step 1: Initiate the Order Step 2: Add Products to the Order

Step 1: Initiate the Order

Method 1: Create New Order from Existing Account

- 1. On the Admin menu, select **Customers > Manage Customers**.
- 2. Find the customer in the list and click to open the record.
- 3. Click the **Create Order** button.

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New Order Detail

- **4.** To complete the order, do the following:
 - **a.** To add products from the Current Activities section, find the product in the list and select the **Add to Order** checkbox. Then, click the **Update Changes** button.

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New Order Detail

b. To add products from the catalog, click the **Add Products** link. Then, select the checkbox of each product to be added to the cart, and the **Qty** to be purchased.

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Add Products

c. If the product has multiple options, click the **Configure** button. Complete the options as needed, and click the **OK** button. Then, click the **Add Selected Product(s) to Order** link to update the cart.

Shapping Cart(3)	Constant Co	-	Plage: 1 of L pages (View 20 m) per page (Table Frecents hund			-	THE Seath
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Configure

d. To override the price of an item, select the **Custom Price** checkbox. Then, enter the new price in the box below. Click the **Update Items and Qty's** button to update the cart totals.

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Blue Horizons Bracelets	1 \$55.00	00	*- Enter custom price excluding fee						100	date lisens and Uty

Custom Price

- e. Complete the following sections, as needed for the order:
 - Apply Coupon Codes
 - Payment Method
 - Shipping Method
- **f.** In the Order Comments section, enter any comments that you want to accompany the order. To include the comments in the email notification that is sent to the customer, click the **Order Comments** button.



Order Comments and Email Confirmation

- **g**. The **Email Order Confirmation** checkbox is selected by default. If you don't want to send an email confirmation to the customer, clear the checkbox.
- 5. When complete, click the **Submit Order** button.

Method 2: Create New Order from Sales

- 1. On the Admin menu, select **Sales > Orders**.
- 2. Click the Create New Order button.

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Create New Order

- **3.** Do one of the following:
 - For registered customers, find the customer in the list and click to open the record.
 - For unregistered customers, click the Create New Customer button.
- **4.** Complete the order information as you would if going through the checkout process .For a new customer account, complete the following sections:
 - Account Information
 - Billing Address
 - Shipping Address

Step 2: Add Products to the Order

Products can be added to the order by selecting each item from the catalog, or by transferring the information from a previous order, the customer's wishlist, recently viewed

products, or other activities.

- **1.** To add products to the order, do the following:
 - a. Click to the Add Products button.
 - **b.** Click the **Reset Filter** button to list all products. Then, use the filter controls as needed to find the products to be added. Then, click the **Search** button.
 - **c.** Select the checkbox of each product to be added to the cart and if applicable, enter the **Qty** to be purchased.

If the product has multiple options, click the **Configure** link. Complete the options as needed and click the OK button.

- 2. Click the **Add Selected Product(s) to Shopping Cart** button to update the cart. The current content of the cart appear in the Items Ordered section.
- **3.** To override the price of an item, select the **Custom Price** checkbox. Then, enter the new price in the box below. Click the **Update Items and Qty's** button to update the cart totals.
- 4. Complete the following sections, as applicable to the order:
 - Apply Coupon Codes
 - Payment Method
 - Shipping Method
- 5. When complete, click the **Submit Order** button.

Update an Order

After a customer has placed an order, it is sometimes necessary to edit the order, place it on hold, or cancel the order entirely. When you make changes to an order, the original order is canceled and a new order is generated. You can, however, make changes to the billing or shipping address without generating a new order.

To edit an order:

- 1. On the Admin menu, select **Sales > Orders**.
- 2. Select the pending order that you want to edit.
- **3.** Click the **Edit** button at the top of the screen. When prompted to confirm, click **OK** to continue.

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Edit Order

- **4.** Make the necessary changes to the order.
- **5**. When complete, do one of the following:
 - Click Save to save changes made to the billing or shipping address.
 - Click Submit Order to save changes made to line items, and reprocess the order.

To place an order on hold:

If the customer's preferred method of payment is not available, or if the item is temporarily out of stock, you can put the order on hold.

- 1. On the Admin menu, select **Sales > Orders**.
- **2.** In the list, find the pending order that you want to place on hold. Then, click to open the order.
- **3.** Click **Hold** to place the order on hold.



Hold Order

4. When you are ready to return the order to an active state, repeat the process and click **Unhold**.

To cancel an order:

Canceling an order removes it from the list of pending orders.

- 1. On the Admin menu, select **Sales > Orders**.
- 2. Find the pending order that you want to cancel, and click to open the order.
- 3. In the upper-right corner, click the **Cancel** button to remove this order.



Cancel Order

4. The status of the order is now "Canceled."

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Canceled Order

Create a Customer Account

Customers usually create their own accounts from your store. However, you can also create customer accounts directly from the Admin, which is useful when customers order by phone.

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Add New Customer

To create a new customer account:

- 1. On the Admin menu, select **Customers > Manage Customers**.
- **2.** Click the **Add New** button.
- 3. In the **Associate to Website** list, select one of the following:
 - Admin
 - Main Website

You can associate a customer with the Admin website to require that orders are placed only from the store Admin. Customers associated with the Admin website cannot log in to their accounts from the store.

- 4. Assign the customer to a **Customer Group**.
- 5. Complete the remaining customer information.

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Customer Information

- 6. In the **Password Management** section, do one of the following
 - Manually assign a password.
 - Select the **Send auto-generated password** checkbox. The new password is generated after the customer information is saved.
- 7. When complete, click the **Save Customer** button.

To add a new address to a customer account:

- 1. On the Admin menu, select **Customers > Manage Customers**. Then, click to open the customer record.
- 2. In the panel on the left, select **Addresses**. Then, do the following:
 - a. To add a new address, click the Add New Address and complete the information.
 - **b.** To assign a **Default Address** check either the **Default Billing Address** or **Default Shipping Address** as needed.

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Customer Addresses

3. When complete, click the **Save Customer** button.

Field Descriptions

FIELD	DESCRIPTION
Associate to Website	Identifies the website associated with the customer account.
Group	Identifies the customer group to which the customer belongs. Select the checkbox to disable automatic group change based on VAT.
Prefix	If used, the prefix that is associated with the customers name. For example: Mr, Mrs. or Dr.
First Name	The customer's first name.
Middle Name / Initial	The customer's middle name or middle initial.
Last Name	The customer's last name.
Suffix	If used, the suffix that is associated with the customer's name. For example: Jr.,Sr., or III.
Email	The customer's email address.
Date of Birth	The customer's date of birth.
Tax / VAT Number	The customer's Tax or Value Added Tax number, if applicable.
Gender	Identifies the customer's gender as Male or Female.

FIELD	DESCRIPTION
Send Welcome Email	Select the checkbox if you want the system to send the customer a welcome email message.
Send From	If you have multiple stores, select the store from which the welcome message will be sent.

Field Descriptions (cont.)

Update a Customer Account

The panel on the left of the Customer Information page includes information about customer activity, such as when the customer last logged in and out, addresses, order statistics, recent orders, shopping cart contents, product reviews, newsletter subscriptions, and so on.

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Customer Account

To view customer information:

1. On the Admin menu, select **Customers > Manage Customers**.

The Manage Customers page lists all customers who have opened an account with your store or were added by the administrator .

- **2.** Click to open a customer record.
- **3.** In the panel on the left, select the type of information you need to edit. Then, make the necessary changes.
- **4.** When complete, click the **Save Customer** button.

Persistent Shopping Cart

A persistent shopping cart keeps track of unpurchased items which are left in the cart, and saves the information for the customer's next visit. Customers who are "remembered" can have the contents of their shopping carts restored the next time they visit your store.

Using a persistent shopping cart can help reduce the number of abandoned shopping carts and increase sales. It is important to understand that the persistent shopping cart does not expose sensitive account information at any time. While the persistent shopping cart is use, both registered customers and guest shoppers are required to either log in to an existing account, or create a new account before going through checkout. For guest shoppers, a persistent shopping cart is the only way to retrieve information from a previous session.

Types of Cookies

To use the persistent shopping cart, the customer's browser must be set to allow cookies. During operation, the following cookies are used:



Session Cookie

A short-term session cookie exists for the duration of a single visit to your site, and expires when the customer leaves, or after a set period of time.



Persistent Cookie

A long-term persistent cookie continues in existence after the end of the session, and saves a record of the customers' shopping contents for future reference.

Persistent Cart Workflow

When Persistent Shopping Cart is enabled, the workflow depends on the values of the "Enable Remember Me" and "Clear Persistence on Log Out" settings, the customer's decision to select or clear the "Remember Me" checkbox, and when the persistent cookie is cleared.

When a persistent cookie is applied, a Not %Jane Smith%? link appears in the page header, to give the customer the ability to terminate the persistent session and start working as a guest, or log in as a different customer. The system retains a record of the shopping cart contents, even if the customer later uses different devices to shop in your store. For example, a customer can add an item to the shopping cart from a laptop, edit the cart contents from a desktop computer, add more items from a mobile device, and complete the checkout process from a tablet.

There is a separate independent persistent cookie for each browser. If the customer uses multiple browsers while visiting your store during a single, persistent session, any changes made in one browser will be reflected in any other browser when the page is refreshed. While the persistent shopping cart is enabled, your store creates and maintains a separate persistent cookie for each browser that is used by a customer to log in or create an account.

An Open Session on a Shared Computer

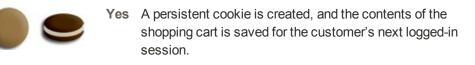
Jane is finishing up her holiday shopping with a persistent session, and adds a present for John to her cart, as well as something for her mother. Then she goes to the kitchen for some milk and cookies.

John sits down at the computer to do some quick shopping while Jane's in the kitchen. Without noticing the "Not %Jane%" link at the top of the page, he finds a nice present for Jane and adds it to the cart. When he goes to checkout and logs in as himself, both the items in Jane's cart are added to his cart. John's in such a hurry that he doesn't notice the additional item during Order Review, and submits the order. Jane's cart is now empty, and John bought presents for both Jane and her mother.

Jane brings John some milk and cookies, and asks, "What's up?" He says, "Oh, nothing."

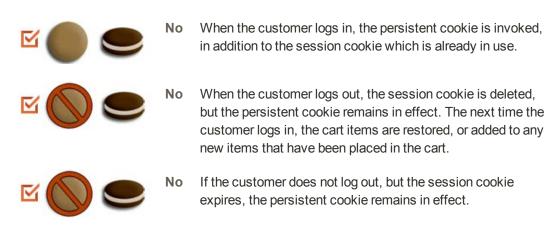
Remember Me

Customers can click the "Remember Me" checkbox on the Login page to save the contents of the their shopping carts.

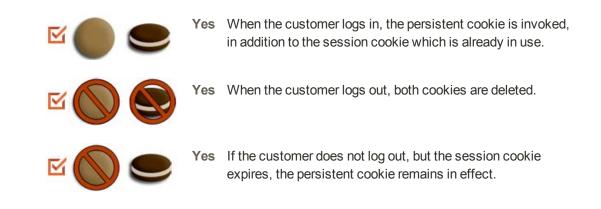


No If "Remember Me" is not selected or is cleared, a persistent cookie is not created, and the cart information is not saved for the customer's next logged-in session.

Continue Persistence After Logout (No)



Clear Persistence on Logout (Yes)



Persistent Cart Settings and Effects

SETTINGS	EFFECT
Enable Remember Me = "No" Clear Persistence on Log Out = any value	The Remember Me checkbox is not available on the login and registration page. The persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = any value Remember Me (not selected)	The session cookie is applied as usual; the persistent cookie is not used.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "Yes" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, both cookies are deleted. If a customer does not log in, but the session cookie expires, the persistent cookie is still used. Apart from logging out, the persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.
Enable Remember Me = "Yes" Clear Persistence on Log Out = "No" Remember Me = "Yes"	When a customer logs in, both cookies are applied. When a customer logs out, the session cookie is deleted, the persistent session continues. The persistent cookie is deleted when its lifetime runs out or when the customer clicks the Not %Jane Smith% link.

Persistent Shopping Cart Setup

During the setup of a persistent shopping cart, you can specify the lifetime of the cookies, and which options you want to make available for various customer activities.

If the session cookie expires while the customer is logged in, the persistent cookie remains active.

To set up a persistent shopping cart:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Customers, select **Persistent Shopping Cart**. Then, click to expand the **General Options** section.
- **3.** To enable the persistent shopping cart and to display additional configuration options, set **Enable Persistence** to "Yes."

General Options		۵
Enable Persistence	Yes	[WEBSITE]
Persistence Lifetime (seconds)	31536000	[WEBSITE]
Enable "Remember Me"	Yes	(WEBSITE)
"Remember Me" Default Value	Yes	[WEBSITE]
Clear Persistence on Log Out	Yes	[WEBSITE]
Persist Shopping Cart	Yes	[WEBSITE]

Persistent Shopping Cart

- **4.** Do the following:
 - **a.** Set **Persistence Lifetime (seconds)** to the length of time that you want the persistent cookie to last. The default value 31,536,000 seconds is equal to one year, and is the maximum time allowed.
 - b. Set Enable "Remember Me" to one of the following:
 - Yes Displays the "Remember Me" checkbox on the Login page of your store, so customers can choose to save their shopping cart information.
 - No Persistence can still be enabled, but customers are not given the option to choose if they want to save their information.
 - c. To preselect the "Remember Me" checkbox, set Remember Me Default Value to "Yes."
 - d. Set Clear Persistence on Log Out to one of the following:
 - Yes The shopping cart is cleared when a registered customer logs out.
 - No The shopping cart is saved when a registered customer logs out.

If the session cookie expires while the customer is still logged in, the persistent cookie remains in use.

- e. Set Persist Shopping Cart to one of the following:
 - Yes If the session cookie expires, the persistent cookie is preserved. If a guest shopper later logs in or creates a new account, the shopping cart is restored.
 - No The shopping cart is not preserved for guests after the session cookie expires.
- 5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIF	PTION
Enable Persistence	Website	Determine	s if the persistence is enabled.
Persistence Lifetime (seconds)	Website		e lifetime of the persistent cookie in /laximum allowed value is 3153600000 00 years).
Enable "Remember Me"	Website	appears or	nether the "Remember Me" checkbox the login and registration pages of the ons include:
		Yes	Displays the "Remember Me" checkbox.
		No	Does not display the "Remember Me" checkbox, and the persistent cookie is used only for customers who already have it.
"Remember Me" Default Value	Website	Defines the checkbox.	e default state for the "Remember Me"
Clear Persistence on Log Out	Website		nether the persistent cookie is deleted re customer logs out.
		configured	how Clear Persistence on Log Out is , if a customer does not log out, but the okie expires, the persistent cookie is
Persist Shopping Cart	Website	access to t	nether using the persistent cookie gives the shopping cart data of the dent account. Options include:
		Yes	The shopping cart contents are saved after the session ends.
		No	The shopping cart contents are not saved after the session ends.



CHAPTER 42: Order Fulfillment

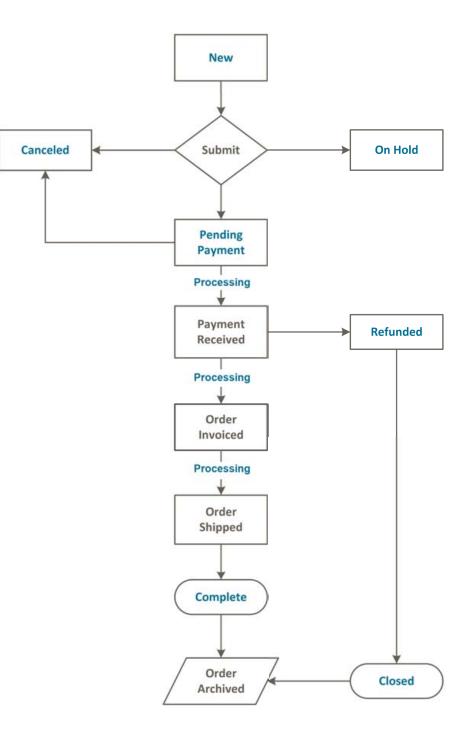
When the order is placed, a sales order is created as a temporary record of the transaction. In the Orders list, sales orders are shown with a status of "Pending," and can be canceled at any time until the payment is processed. After payment confirmed, the order can be invoiced and shipped. Topics in this chapter:

- Order Workflow
- Order Status
- Invoice an Order
- Ship an Order
- Transactions

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Place Order

Order Workflow



Order Status

All orders have an order status that is associated with a stage in the order processing workflow. You can see the status of an order by clicking the control at the top of the Status column.

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Order Status

Your store has a set of predefined order status and order state settings. The state describes the position of an order in the workflow.

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Order Status and State

Custom Order Status

In addition to the preset order status values, you can create custom order status values of your own, assign order statuses 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 then assign it to the associated order state in the order processing workflow.

Currently only default custom order status values are applied in the order management workflow. The custom status values that are not set as default are available only in the comments section in the order view in the Admin .

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Order Statuses

To create a custom order status:

- 1. On the Admin menu, select **System > Order Statuses**.
- 2. In the upper-right corner, click the **Create New Status** button.
- **3.** In the Order Status Information section, do the following:
 - **a.** Enter a **Status Code**. This value is for internal use only. The first character must be a letter (a-z), and the rest can be any combination of letters and numbers (0-9). You can use the underscore character instead of a space.
 - b. Enter a **Status Label** to identify the status setting in both the Admin and store.

Order Status Information	
Status Code * Status Label *	
-	

Order Status Information

- **4.** In the Store View Specific Labels section, enter any labels that you need for different store views and languages.
- 5. When complete, click the **Save Status** button.

The new order status now appears in the Order Statuses list.

To assign an order status to a state:

- **1.** Front the Order Statuses list, click the **Assign Status to State** button.
- **2.** In the Assignment Information section, do the following:
 - a. Select the Order Status that you want to assign. They are listed by status label.
 - **b.** Select the **Order State** that represents where the order status belongs in the workflow.
 - **c.** To make this status the default for the order state, select the **Use Order Status as Default** checkbox.

Assignment Information	
Order Status *	•
Order State *	•
Use Order Status As Default	

Assign Status to State

3. When complete, click the **Save Status Assignment** button.

To edit an existing order status:

- 1. On the Order Statuses page, click to open the status record in edit mode.
- **2.** Update the status labels as needed.
- **3.** When complete, click the **Save Status** button.

To remove an order status from an assigned state:

- 1. On the Order Statuses page, find the order status record that you want to unassign.
- 2. In the Action column on the far right of the row, click 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 statuses cannot be deleted.

Invoice an Order

An invoice is a record of the receipt of payment for an order. Creating an invoice for an order converts the temporary sales order into a permanent record of the order, which cannot be canceled. A new invoice page looks similar to a completed order page, with some additional fields that can be edited. Every activity that is related to an order is noted in the Comments section of the invoice.

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. Invoices can be generated for a single order, or for a batch of orders. The payment method determines which invoicing options can be used for the order. For payment methods with Payment Action set to "Authorize and Capture," the Invoice button does not appear.

Before an invoice can be printed, the invoice must first be generated for the order. To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.



Invoice Order

To invoice an order:

- 1. On the Admin menu, select **Sales > Orders**.
- **2.** In the list, find the "Pending" order, and click to open the record.
- **3.** If the items are ready to ship, you can create a packing slip for the shipment with the invoice. To create a packing slip, do the following:
 - a. In the Shipping Information section, select the **Create Shipment** checkbox.
 - **b.** To include a tracking number, click the **Add Tracking Number** button and enter the **Carrier, Title**, and **Number**.

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Shipping Information

- **4.** To make a partial invoice scroll down to the Items to Invoice section, and enter the **Qty to Invoice** for each item.
- **5.** Under the Invoice History menu, in the **Invoice Comments** section, complete the comments as needed. Then, in the Invoice Totals section, select the **Append Comments** checkbox to add the comments to the invoice.
- 6. Select the **Email Copy of Invoice** checkbox to send a copy of the invoice to your customer.
- **7.** Do one of the following:
 - Click the **Submit Invoice** button to process the invoice and capture the sale.
 - If your store requires that you ship before invoicing, click the **Ship** button, complete the shipping information and submit the shipment. When that is complete, you can finish the invoicing steps.

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Invoice

Payment Actions

PAYMENT ACTION	DESCRIPTION
Capture Online	Upon invoice submission, the system captures the payment from the third-party payment gateway. You have the ability to create a credit memo and void the invoice.
Capture Offline	Upon invoice submission, the system does not capture the payment. It is assumed that the payment is captured directly through the gateway, and you no longer have the option to capture this payment through Magento. You have the ability to create a credit memo, but you do not have the option to void the invoice. (Even though the order used an online payment, the invoice is essentially an offline invoice.)
Not Capture	When the invoice is submitted, the system does not capture the payment. It is assumed that you will capture the payment through Magento at a later date. There is a Capture button in the completed invoice. Before capturing, you are able to cancel the invoice. After capturing you are able to create a credit memo and void the invoice.

Payment Actions (cont.)

PAYMENT ACTION	DESCRIPTION
	Do not select Not Capture unless you are certain that you are going to capture the payment through Magento at a later date. You will not be able to create a credit memo until the payment has been captured using the Capture button.

Print Invoices

You can print an invoice for a single order, or for multiple invoices as a batch, or group. However, before an invoice can be printed, the invoice must first be generated for the order.

To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

To print invoices:

- 1. On the Admin menu, select **Sales > Invoices**.
- 2. In the Invoices list, select the checkbox of each invoice that you want to print.
- 3. Set the Actions control to "Print Invoices."

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Print Invoices

- 4. Click the **Submit** button to generate the PDF and display the document in a new window.
- **5.** After the file has been downloaded and saved to your computer, you can open and print the document with Adobe Reader.

Ship an Order

An order that has been paid, but is awaiting shipment has the "Processing" status. The shipment record contains a detailed history of the fulfillment process associated with the order. Partial shipments can be made until the order is fulfilled.

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Ship an Order

To ship an order:

- 1. On the Admin menu, select **Sales > Orders**.
- 2. In the Orders list, click to open the order to be shipped.
- 3. In the upper-right corner, click the **Ship** button.
- **4.** If you need to update the billing or shipping address, click the **Edit** link in the upper-right corner of the section. Make the necessary changes, and click the **Save Order Address** button.
- **5.** To have the carrier generate a shipping label, select the **Create Shipping Label** checkbox. Then, do the following:
 - **a.** To add a tracking number, scroll down to the Shipping Information section, and click the **Add Tracking Number** button.
 - **b.** Do one of the following:
 - Select the Carrier, and enter the tracking Number.
 - Set **Carrier** to "Custom Value." Enter a **Title** for the custom carrier, and enter the tracking **Number**.



Shipping Information

- 6. To make a partial shipment, scroll down to the Items to Ship section, and enter the **Qty to Ship** for each item.
- **7.** To notify customers by email of the shipment, do the following:
 - a. Enter any comments you would like to include in the **Shipment Comments** box.
 - **b.** To include the comments in the notification email that is sent to the customer, select the **Append Comments** checkbox.
 - **c.** To send a copy of the shipment email to yourself, select the **Email Copy of Shipment** checkbox. The status of an invoice email appears next to the invoice number of the completed invoice as either sent or not sent.
- **8.** When complete, click the **Submit Shipment** button. The status of the order changes from "Processing" to "Complete."

To view the shipment detail:

- 1. On the Admin menu, select **Sales > Shipments**.
- 2. Find the shipment in the list, and click to open the record.
- **3.** If you want to add a comment to the order, scroll down to the Comments History section, and enter the comment in the box.
 - To send the comment to the customer by email, select the **Notify Customer by Email** checkbox.
 - To post the comment in the customer's account, select the **Visible on Frontend** checkbox.
- 4. Click the **Submit Comment** button.

Packing Slips

A packing slip is a sales document that accompanies shipments sent from your store, and lists each item included in the package. You can print a packing slip for a single order, or print multiple packing slips as a batch, or group. However, before a packing slip can be printed, it must first be created for the order.

To view or print the PDF, you must have a PDF reader. You can download Adobe Reader at no charge.

To print packing slips:

1. On the Admin menu, select **Sales > Shipments**.

Method 1: Print Single Packing Slip from Shipment

- 1. In the Shipments list, open the record that needs a packing slip.
- **2.** In the upper-right corner of the shipment page, click the **Print** button. Look for the download indicator in the lower-left corner of your browser window.

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3	TribeCa Skinny Jean Color Black Size	wpd	sdeets2

Packing Slip

Method 2: Print Multiple Packing Slips

- 1. In the Shipments list, select the checkbox of each shipment record that needs a packing slip.
- 2. In the upper-right corner, set the **Actions** control to "PDFpackingslips" and click the **Submit** button.

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Printing Multiple Packing Slips

- **2.** Do one of the following:
 - To save the document, click the **Save** button. 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 in Adobe Reader, click the **Open** button. From here, you can either print the packing slip or save it to your computer.

Transactions

The Transactions page lists all payment activity that has taken place between your store and external payment systems, and provides access to detailed information about each transaction.

To view transactions:

On the Admin menu, select **Sales > Transactions**.

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Transactions



CHAPTER 43: Store Credit and Refunds

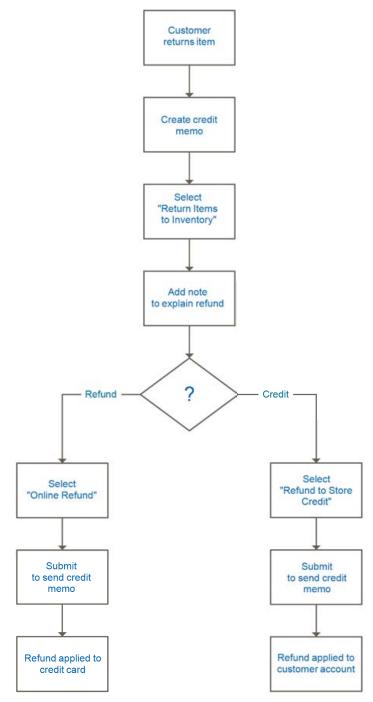
Store credit is an amount to be restored to a customer account. Store credit can be used by customers to pay for purchases, and by administrators as cash refunds. Gift card balances can be credited to the customer's account, instead of using the gift card code for future purchases.

After an order has been paid for and invoiced, all of the order, or a portion of it, can be refunded by issuing a credit memo. A credit memo differs from a refund because the amount of the credit is restored to the customer's account where it can be applied to future purchases, rather than returned to the customer as cash. In some cases, a refund can be given at the same time that a credit memo is issued, just as payment can be made at the time of invoicing. The amount of store credit in a customer's account can be managed from Admin.

Topics in this chapter:

- Product Return Workflow
- Create Credit Memo
- Print Credit Memo

Product Return Workflow



Product Return Workflow

Create a Credit Memo

A credit memo is a document that lists 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, or group. Before a credit memo can be printed, it must first be generated for the order.

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Credit Memo

To create a credit memo:

- 1. On the Admin menu, select **Sales > Orders**.
- 2. Find the order in the list, click to open the order.
- **3.** In the upper right corner, click the **Credit Memo** button. (The button appears only if an invoice has been generated for the order.)

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.

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New Credit Memo

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, check 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 you have set the inventory Stock Options to "Decrease Stock When Order Is Placed."

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Return to Stock

- **5.** Complete the following:
 - **a.** In the **Qty to Refund** box, type the number of items to be returned and press the **Enter** key to record the change. The Update Qty's button appears.
 - **b.** Set the **Qty to Refund** of any items not to be refunded to **o**.
 - **c.** Click the **Update Qty's** button to recalculate the total. (The amount to be credited cannot exceed the maximum quantity that is available for refund.)

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Update Quantities

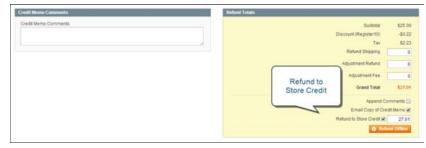
- 6. In the **Refund Totals** section, do the following, as applicable:
 - **a.** In the **Refund Shipping** field, enter the amount that is to be refunded from the shipping fee. This field initially displays the total shipping amount from the order that is available for refund. It is equal to the full shipping amount from the order, less any shipping amount that has already been refunded. Like the quantity, the amount can be reduced, but not increased.
 - **b.** In the **Adjustment Refund** field, enter a value to be added to the total amount refunded as an additional refund that does not apply to any particular part of the order (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.

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Update Quantities

- **d.** If the purchase was made using store credit, select the **Refund to Store Credit** checkbox, to credit the amount back to the customer's account balance.
- e. To add a comment, type the text in the **Credit Memo Comments** box.
- **f.** To send an email notification to the customer, select the **Email Copy of Credit Memo** checkbox.
- **g.** If you want to include the comments you have entered, check the **Append Comments** checkbox.

The status of a credit memo notification appears in the completed credit memo next to the credit memo number.



Refund Totals

- **7.** To complete the process and generate the credit memo, select one of the following refund option buttons, depending on 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.
 - To send the comment to the customer by email, select the **Notify Customer by Email** checkbox.
 - To post the comment in the customer's account, select the **Visible on Frontend** checkbox.

Below the credit memo is a complete list of all activity related to the order.

9. Click the **Submit Comment** button.



Credit Memo Submit Comment

Print a Credit Memo

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.

CO. M	ager	nto' Admin Panel				5.00		et al la companya de	CHCOLWARD CO	n Sanday, May 4, 20				
Demo		Sales Calarig Meda	Cathe		Arrs Newsletter		-	yten						
() 1.00vet	*****	Orders	put phone	numbers and pail	ists before site launch				You have I street & map	e. 19 minut and 135 not	in second	d messings	al Daha	-
		Involuti												
Cred	it Me	Stipments												
200		Credit Memie								-		_	-	_
Page 1		Transactions	Des balle	Total 4 record	ts Round				Export to CEV	Caperf		-	1100	Lease
Desired Vis		Recurring Profiles (beta)								Adens			•	1
	Cred	Billing Agreements	and At		Criter #	0	Ger Date		200 to Name	Status .		Related		Activ
Any .		Tarms and conditions	Futh			- P	om: 2				٠	From:		
		Tax				T	11 12					Tet		
- 13	10000	0008 Ma	4,2014 5.1	5.12 AM	100000208	55	ey 29, 2013	129.44 AM	John Doe	Retunded			\$245.25	Ver
12	10000	0067 Jun	18,2013 6	19-07 AM	100008295	84	ey 28, 2013	128.25 PM	John Doe	Refunded			\$302.57	Ver
10	10000	0006 Ma	29, 2913 1	10.47.444	100008203	54	ny 27, 2013	12:07:47 PM	Jane Smith	Refunded			\$134.25	Ymr
12	10000	0006 10	29,2913 1	10.04.000	100008208		ey 28, 2013	1.749.745.898.8	John Dee	Rehinded			\$215.09	-

Credit Memos

To print a credit memo:

1. On the Admin menu, select **Sales > Credit Memos**.

Dathbeard Seles	Calaing Makie Calamers Plans	den Newsleber		5		Cet heigt for	
Labort Mercege: Retellate	Change Maganto's default phone numbers and call	inals before site laursch	Ne - Series area	You have I callcut, So	PDF	errappiti Galar	utilita
Gredit Memos					Credit Memos		
	Vew 20 e per page Total 4 recen	n toursi		il Equate Of	-	Taxable of	-
Select	· • Name associat				Action Little		
GINEGROOM	Created At 8	Order #	Circles Date	Inthe Name	20rdem	Netwood	Act
	From: 10		From: W			From:	
	Ter (1)		To: I			To:	
2 10000000	May 4, 2014 5 15 12 AM	100000208	May 29, 2013 1 29 44 AM	Jubn Doe	Refunded	\$245.25	Ver
		100000208	May 28, 2913 1 28 25 PM	John Doe	Related	\$352.57	1 mar
100000007	Jun 18, 2013 5:09:07 AM						
	May 29, 2013 1:55:47 AM	100000203	May 27, 2013 12:07 47 PM	Jane Smith	Refunded	8134,23	

Selected Credit Memo with Action

2. Use one of the following methods to print the credit memo:

Method 1: Open the Credit Memo

- 1. In the list, click to open the credit memo.
- 2. Click the **Print** button to print the PDF document.

Method 2: Use the Action Control

- 1. In the list, select the checkbox of each credit memo that you want to print.
- 2. Set the Actions control to "PDF Credit Memos," and click the Submit button.
- **3**. When prompted, do one of the following:
 - To save the document, click **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, click **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 hard disk.

Credit Memo # 10000008							
Order # 100000208							
Order Date: May 29, 2013							
Sold to:		Ship to:					
John Doe		John Doe					
10441 Jefferson Blvd, Suite 200 Culver City,		10441 Jeffers	on Blvd, Suite 20	0 Culver City			
California, 90232		California, 9	0232				
United States		United States	в				
T: 888-888-8888		T: 888-888-88	388				
Payment Method		Shipping l	Method:				
Check / Money order		United Parcel Service - Ground					
		(Total Shippi	ing Charges \$0.0	0)			
Products	SKU	Total (ex)	Discount	Qty	Tax	Total (in	
Jackie O Round Sunglasses	ace001	\$225.00	\$0.00	1	\$20.25	\$245.2	
				Subt	otal:	\$225.0	
					Tax:	\$20.2	
				Grand T		\$245.2	

PDF Credit Memo

Notes	



CHAPTER 44: Sales Document Setup

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 the Order ID for reference.

Topics in this chapter:

- Logo Requirements
- Show Order ID and IP Address
- PDF Invoice with High-Resolution Logo

Logo Requirements

The logo that is used for PDF print-outs can be a high-resolution, 300 dpi image, but must be a specific size. However, the size of the logo that appears in the HTML print view version of sales documents is determined by your theme.



One way to resize your logo to fit the required size is to create a new, blank image with the correct dimensions. Then, paste your logo image and resize it to fit the height. With most image editing programs, you can preserve the aspect ratio by holding down the shift key as you resize the image. The following image is a 200px by 50px .png file with a transparent background, (which is represented by the checkerboard pattern). The same image is used for the high-resolution image on the PDF invoice, but saved as a 300 dpi jpg.

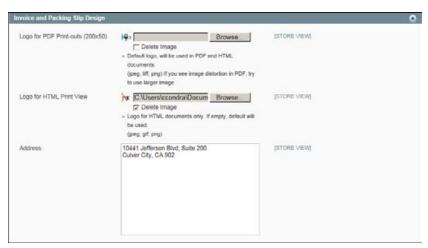
To set up your sales documents:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Sales**.
- 3. Click to expand the Invoice and Packing Slip Design section, and do the following:
 - **a.** To upload the **Logo for PDF Print-outs**, click the **Browse** button. Then, select the logo that you have prepared and click **Open**. The path to the file appears in the text box.
 - **b.** To upload the **Logo for HTML Print View**, click the **Browse** button. Then, select the logo that you have prepared and click **Open**. The path to the file appears in the text box.
- 4. Enter your address as you want it to appear on invoices and packing slips.
- 5. When complete, click the **Save Config** button.

For reference, a small and slightly distorted version of the uploaded image appears before each field.

To replace an image:

- **1.** Click the **Browse** button and select the new logo.
- 2. Select the **Delete Image** checkbox for the image you want to replace.
- **3.** Click the **Save Config** button.



Invoice and Packing Slip Design

FIELD	SCOPE	DESCRIPTION
Logo for PDF Print-outs (200 x 50)	Store View	Identifies the logo file that appears in the header of PDF invoices and packing slips.
		To delete the current image and upload another, select the Delete Image checkbox. Then, browse to select the new image.
		Image size: 200 x 50 pixels
		Allowed file types:
		.jpg /.jpeg
		.tif/.tiff
		.png
Logo for HTML Print View	Store View	Identifies the logo file that appears in the header of HTML print view of invoices and packing slips.
		To delete the current image and upload another, select the Delete Image checkbox. Then, browse to select the new image.
		Image size: 200 x 50 pixels, or as specified by theme.
		Allowed file types:
		.jpg /.jpeg
		.gif
		.png
Address	Store View	The store address as you want it to appear on invoices and packing slips.

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	

Add 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.

To show the Order ID:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **PDF Print-outs**.
- 3. Click to expand the **Invoice** section.
- 4. To include the Order ID in the header, Set Display Order ID in Headerto "Yes."
- 5. Repeat these steps for the **Shipment** and **Credit Memo** sections.
- 6. When complete, click the **Save Config** button.

Magento Admin Panel		Global Recor	d Search	Logged in an advan Saferday, May 5, 2014 Tri-Magerlin Dis.Int.Tonn Lost.Do	100	
Dettourd Sales Calabag	Make Customers Providure	(Newslatter) (CMEI Riegents	System .		
Claimed Messager Hammeler Charge Mag	ento's default phone numbers and callouts t	where site launch			Tax have 1 chical. 5 major, 19 mmer and 154 holice enneal message(s) Sales and	Cife
Current Configuration Scope Default Config	POF Print-outs				O Sere C	
therease bloost	lawage .					٥
Configuration	Display Order ID in Header	740			ISTORE VIEW	
GENERAL	Depres					0
Cenaral Tiel		(Yes			(and the second s	
Design	Display Order ID in Header	785			States Asia	
Currency Setup	Credit Memo					0
Store Email Addresses	Processing and the second	The second se		٠		_
Contacts	Display Order ID in Header	1.64		(*)	Instant Anni	
Reports						
Content Management						

PDF Print-outs

To show the customer IP address:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Sales**.
- 3. Click to expand the **General** section.
- **4.** To show the IP address of the computer that was used to place the order, set **Hide Customer IP** to "No."

Hide Customer IP	No	[STORE VIEW]	
	Controls whether customer IP is shown in orders,		
	invoices, shipments, credit memos.		

5. When complete, click the **Save Config** button.

PDF Invoice with Logo

This print-ready invoice has a high-resolution, 300 dpi logo that reproduces well with the text on the page.

Suite 200 C 2 - Ground		ty.	
r		ty,	
- Ground			
ges \$0.00)			
	Qty	Tax	Subtot
340.00	1	\$30.60	\$340.0
\$25.00	3	\$6.75	\$75.0
\$50.00	1	50.00	\$50.0
\$55.00	1	\$4.95	\$55.0
\$35.00	1	\$3.15	\$35.0
	Disco	ount (): Tax:	\$555.0 -\$5.0 \$45.4 \$595.4
		.00 1 Su Disco	.00 1 53.15 Subtotal: Discount ():

PDF Invoice with High-Resolution Logo

Customer Address Templates

The store administrator can modify the address templates that control the format of the customer billing and shipping addresses that appear in the following locations:

- · General customer billing and shipping address format
- Shipping and billing addresses in customer's address book (available during the shopping cart checkout)
- · Address format for PDF sales documents, such as invoices, shipments, and refunds

Example 1: Text Templates

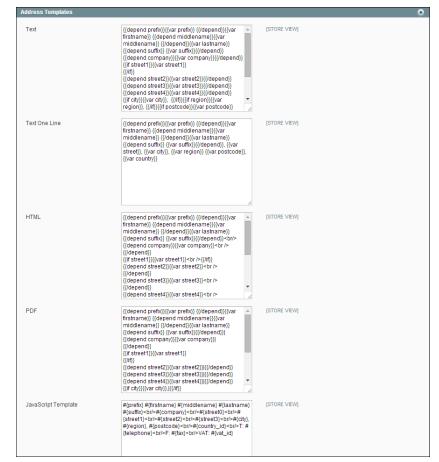
For Text, Text One Line, HTML and PDF Address Templates

```
{{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 menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.

The section includes a separate set of formatting instructions for each of the following:

- Text
- Text One Line
- HTML
- PDF
- JavaScript Template
- 3. Edit each template as needed, using the examples below for reference.
- 4. When complete, click the Save Config button.

TEMPLATE	SCOPE	DESCRIPTION	
Text	Store View	The template is used printed.	d for all addresses that are
Text One Line	Store View		es the order of address entities opping cart address book list. ckout.
HTML	Store View	This template defines the order of address fields located under the Customer Addresses area in the Admin panel (Customers > Manage Customers) and those located on the Add New Address page when a customer creates a new billing or shipping address on his or her account page.	
PDF	Store View	The template defines the display of billing and shipping addresses in the printed invoices, shipments, and credit memos.	
JavaScript Template	Store View	In the templates, you blocks:	u will see the following code
		depend	For processing inner elements.
		if	An attribute is defined.
		var	The code attribute is printed.

Notes		



Payments

In this section...

Basic Payment Methods

PayPal Payment Solutions

Payment Solutions & Gateways

Payment Services



CHAPTER 45: Basic Payment Methods

Magento Community Editionsupports a wide variety of payment methods, services, and gateways that you can offer for your customers' convenience. In addition to the payment methods in this guide, other solutions can be downloaded from Magento Connect.

Topics in this chapter:

- Bank Transfer Payment
- Cash On Delivery
- Check / Money Order
- Purchase Order
- Zero Subtotal Checkout
- Saved Credit Card

Merchant Location

Setting the merchant location is the first step to configure any payment method.

To set the merchant location country:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**.
- **3.** In the upper-right corner, set **Current Configuration Scope** to either your website or leave it set to "Default Config."
- 4. In the Merchant Location section, set **Merchant Country** to your country.

Merchant Location		۲
Merchant Country	United States (WEBSITE)	
	Merchant Location	

- **5.** When complete, click the **Save Config** button.

Bank Transfer Payment

Magento Community Edition lets you accept payments transferred directly from customers' bank accounts to your merchant bank account.

Enabled	Yes	٠	[weeque]	
Title	Bank Transfer Payment		(STORE VEW)	
Vew Order Status	Pending	•	(wesome)	
Payment from Applicable Countries	All Allowed Countries	•	(WEB5/TE)	
Payment from Specific Countries	Alghamstan Aland Istando Albanio Angeta Anterica Samoa Angota Angota Angota Angota Angota Angota Anterica Anterica	U	(websing)	
nstructions			ISTORE VEW]	
linimum Order Total			[weesene]	
laximum Order Total			(westing)	
Sort Order	((WEBSITE)	

Bank Transfer Payment

To set up bank transfer payments:

- **1.** On the Admin menu, select **System > Configuration**.
- In the panel on the left, under Sales, select Payment Methods. Click to expand the Bank Transfer Payment 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.** Enter the **Instructions** your customers must follow to set up a bank transfer. Depending on the country where your bank is located and your bank's requirements, 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.

- **3.** 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.)
- 4. When finished, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Determines if customers can pay by transferring payment directly from their bank to your merchant account. Options include: Yes / No.
Title	Store View	The name for this payment method that appears to customers during checkout.
New Order Status	Website	Determines the initial order status assigned to orders paid by bank transfer. Default value: Pending
Payment from Applicable Countries	Website	Determines the countries from which you accept payment by bank transfer. Options include: All Allowed Countries Specific Countries.
Payment from Specific Countries	Website	Identifies the specific countries from which you accept payment by bank transfer.
Minimum Order Total	Website	The smallest order amount that can be paid by bank transfer.

FIELD	SCOPE	DESCRIPTION
Maximum Order Total	Website	The largest order amount that can be paid by bank transfer.
Sort Order	Website	A number that determines the order that payment by bank transfer appears when listed with other payment methods during checkout. Enter 0 for the top of the list.

Field Descriptions (cont.)

Cash On Delivery

Magento Community Edition allows you to accept COD payments from your customers. With a cash on delivery payment, the customer pays at the time of delivery. The customer pays the order amount to the shipping carrier, who sends a check to you. Shipping carriers typically charge an extra fee for COD service. You can account for this fee in your shipping and handling charges.

Title Cash On Delivery ISTORE VEW New Order Status Pending Meesares Payment from Applicable All Allowed Countries INEESTRE Payment from Specific Countries All phanestan Alarch Handné Abaria Adminia Adminia Antonican Starmaa Antonican Starmaa Antonican Starmaa Antonican INEESTRE Instructions [ISTORE VEW) Minimum Order Total INEESTRE	Enabled	Yes	 [WEBSTE] 	
Payment from Applicable All Allowed Countries Countries Payment from Specific Countries Algournation Algoria Androirs	Title	Cash On Delivery	ISTORE VEWI	
Countries Payment from Specific Countries Adand falando Adanda Adando Adanda Ad	New Order Status	Pending	 [weesnet 	
Mart felande Aberla Meria Anencan Sama Angela Ang		All Allowed Countries	[WEBS/TE]	
Minimum Order Total (VEBS/TE)	Payment from Specific Countries	Aland Islands Albertia Algerta Amorra Angota Angota Angota Angota Angota Angota	(WEBSITE)	
	instructions		letone vend	
	Minimum Order Total	_	(WEBS/RE)	
Maximum Order Total [VIEBSITE]				
Sort Order Total		L.		

Cash On Delivery Payments

To set up cash on delivery payments:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand the **Cash on Delivery Payments** 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 receipt of payment is confirmed.
- d. Set **Payment from Applicable Countries** to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this payment method.
Specific Countries	Select each country in the list where customers can make purchases from your store.

- e. Enter Instructions for making a Cash On Delivery payment.
- **f.** Set **Minimum Order Total** and **Maximum Order Total** to the order amounts which are required to qualify for this payment method.

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.)
- 3. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Determines if customers can pay with cash at the time of delivery (COD). Options include: Yes / No.
Title	Store View	The name of this payment method that appears to customers during checkout.
New Order Status	Website	Determines the initial order status assigned to orders paid by COD. Default value: Pending
Payment from Applicable Countries	Website	Determines the countries from which you accept payment by COD. Options include: All Allowed Countries Specific Countries.
Payment from Specific Countries	Website	Identifies the specific countries from which you accept payment by COD.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Minimum Order Total	Website	The smallest order amount that can be paid by COD.
Maximum Order Total	Website	The largest order amount that can be paid by COD.
Sort Order	Website	A number that determines the order that payment by COD appears when listed with other payment methods during checkout. Enter 0 for the top of the list.

Check / Money Order

Magento Community Edition allows you to accept payments by either check or money order. The Check / Money Order payment method is enabled for your story by default.

Enabled	Yes	•	[WEBS/TE]
Title	Check / Money order		ISTORE VEW)
New Order Status	Pending	•	(wessite)
Payment from Applicable Countries	All Allowed Countries	•	[WEBSITE]
Payment from Specific Countries	Aghanustan Aland (standa Ahuris Algeris Anantcan Gamba Andors Angolita Angolita Angolita Angolita Angolita Angolita		[weBone]
lake Check Payable to			[STORE VEW]
Send Check to	1		(STORE VEW)
Minimum Order Total			(WEBSITE)
Maximum Order Total			(WEBSITE)
Sort Order		1	(WEBSITE)

Check / Money Order

To set up payment by check or money order:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**. Click to expand **Check** / **Money Order**, and 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 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.

- 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.)
- **3.** When finished, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Determines if customers can pay by check or money order. Options include: Yes / No.
Title	Store View	The name for this payment method that appears to customers during checkout.
New Order Status	Website	Determines the initial order status assigned to orders paid by a check or money order. Default value: Pending
Payment from Applicable Countries	Website	Determines the countries from which you accept payment by check or money order. Options include:

FIELD	SCOPE	DESCRIPTION
		All Allowed Countries Specific Countries.
Payment from Specific Countries	Website	Identifies the specific countries from which you accept payment by check or money order.
Make Check Payable to	Store View	The name of the entity to whom checks and money orders should be made payable.
Send Check to	Store View	The street address or PO Box where checks and money orders should be sent.
Minimum Order Total	Website	The smallest order amount that can be paid by check or money order.
Maximum Order Total	Website	The largest order amount that can be paid by check or money order.
Sort Order	Website	A number that determines the order that ayment by check or money order appears when listed with other payment methods during checkout. Enter 0 for the top of the list.

Field Descriptions (cont.)

Purchase Order

A purchase order (PO) allows commercial customers to pay for purchases with prior authorization by referencing the PO number. During checkout, the customer is prompted to enter the purchase order number as the method of payment.

Customers who are representatives of other companies can use the Purchase Order payment method to buy products and assign a corresponding purchase order number generated in their accounting system to the sales order generated in Magento.

For example, your customer represents the company that sells computers and needs to buy some monitors from your store. In their accounting system, the customer creates a purchase order that is assigned a unique PO number. The customer places an order in your store using the Purchase Order payment method and references the PO number from their accounting system. All order-related documents, including the order confirmation email, invoice, shipment, and credit memo, will have the PO number on them. The company accounting department can now reference the PO number entered on the Magento sales order so that they can track the order.

When the customer receives your invoice, they process the payment in their accounts payable system. You should always establish the credit worthiness of a customer before accepting payment by purchase order.

Enabled	Yes	 [weesne] 	
Title	Purchase Order	(STORE VIEW)	
New Order Status	Pending	 [WEBS/TE] 	
Payment from Applicable Countries	All Allowed Countries	 [weesme] 	
Payment from Specific Countries	Alghamittan Albanis Albanis Albanis Alpetis Amencan Samna Ansota Angota Angota Angota Angota Angota Angota Angota Angota Angota Angota	[WERGINE]	
Minimum Order Total		(WEBSITE)	
Maximum Order Total		(WEBS/TE)	
Sort Order		[WEBS/TE]	

Purchase Order

To set up payment by purchase order:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**. Click to 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.)
- 3. When finished, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Determines if customers can pay by purchase order (PO). Options include: Yes / No.
Title	Store View	The name of this payment method that appears to customers during checkout.
New Order Status	Website	Determines the initial order status assigned to orders paid by PO. Default value: Pending
Payment from Applicable Countries	Website	Determines the countries from which you accept payment by PO. Options include:
		All Allowed Countries
		Specific Countries.
Payment from Specific Countries	Website	Identifies the specific countries from which you accept payment by PO.
Minimum Order Total	Website	The smallest order amount that can be paid by PO.
Maximum Order Total	Website	The largest order amount that can be paid by PO.
		An order qualifies if the total is between, or matches, the minimum or maximum order total.
Sort Order	Website	A number that determines the order that payment by PO appears when listed with other payment methods during checkout. Enter 0 for the top of the list.

Zero Subtotal Checkout

Zero Subtotal Checkout is available only for orders created from the Admin. It can be used for orders with a subtotal of zero that are taxed after any discount has been applied. This situation might occur when a discount covers the entire price of the purchase, and there is no additional charge for shipping. To save time, these orders can be set to invoice automatically.

Unlike other payment methods for which you can set order amount filters, this method contains an intrinsic order amount filter, so that the method appears only when the subtotal equals zero. Zero Subtotal Checkout can be used when:

- The product that the customer adds to the shopping cart is of the Downloadable or the Virtual product type and the price equals zero.
- The price of a Simple product is zero and the Free Shipping method is available.
- A coupon code that covers the full price of products and shipping is applied in the shopping cart.

To set up Zero Subtotal Checkout:

- 1. On the Admin menu, select **System > Configuration**.
- In the panel on the left, under Sales, select Payment Methods. Click to expand the Zero Subtotal Checkout section. Then, do the following:

litie	No Payment Information Required	ISTORE VIEW]	
nabled	Yes	 [WEB5/7E] 	
lew Order Status	Pending	 (WEBSITE) 	
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]	
Payment from Specific Countries	Abghamatan Alandi Islandis Albania Angerta American Bambaa Angerta Ang	(WEBSITE)	
Sort Order	1	(WEBGITE)	

Zero Subtotal Checkout

- a. Enter a **Title** to identify this payment method during checkout.
- **b.** Set **Enabled** to "Yes" to activate this payment method.
- c. 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 with 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.)
- **3.** When finished, click the **Save Config** button.

Field Descriptions		
FIELD	SCOPE	DESCRIPTION
Title	Store View	The name for this payment method that appears during checkout. The default value is, "No Payment Information Required."
Enabled	Website	Determines if Zero Subtotal Checkout is available for the store administrator to manage orders that have a subtotal of zero, such as one that has been taxed, but a discount has reduced the amount to zero. Options include: Yes / No.
New Order Status	Website	Determines the initial order status assigned to orders processed as Zero Subtotal Checkout. Default value: Pending
Payment from Applicable Countries	Website	Determines the countries from which Zero Subtotal Checkout can be applied. Options include: All Allowed Countries Specific Countries.
Payment from Specific Countries	Website	Identifies the specific countries for which Zero Subtotal Checkout can be applied.
Sort Order	Website	A number that determines the order that the title, such as "No Payment Information is Required," appears when listed with other payment methods during checkout. Enter 0 for the top of the list.

Saved Credit Cards

This option gives you the ability store credit card numbers to process offline. This method is useful when you have a card terminal in a "brick and mortar" store, or have access to a virtual terminal. As with all online payment methods, it is highly recommended that you configure an SSL certificate for your store.

Important! Saving customer card data is discouraged unless absolutely necessary. Even though the data is encrypted, being in possession of the data increases your security risk. If you save customer credit card numbers online, your store will be out of compliance with Payment Card Industry (PCI) requirements.

aved CC			٥
Enabled	No	 (WEBSITE) 	
Title	Credit Card (saved)	ISTORE VIEW]	
New Order Status	Pending	 [weasing] 	
Credit Card Types	American Express Visa MasherCard Discover JCB Solo Solo Other	(wilden)	
Request Card Security Code	No	 (website) 	
3D Secure Card Validation	No	 (weesite) 	
Payment from Applicable Countries	All Allowed Countries	(weesne)	
Payment from Specific Countries	Alghanstan Alandi Islanda Albania Algenta Annerican Itamoa Annerican Itamoa Angela Angela Angela Antarica Antarica	(weekre)	
Minimum Order Total		pwensmel	
Maximum Order Total	[Ivvensuel	
Sort Order		Investment	

Saved CC

To set up the Saved Credit Cards:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under Sales, select **Payment Methods**.
- **3.** In the upper-right corner, set **Current Configuration Scope** to the applicable website or store view for the configuration.
- 4. Click to expand the **Saved CC** section.
- 5. Complete each field in this section, using the following field descriptions for reference.
- 6. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Enabled	Website	Determines if payment by a saved credit card is available to customers. Options include: Yes / No.
Title	Store View	The name of this payment method that appears to customers during checkout.
New Order Status	Website	Determines the initial order status assigned to orders paid by a saved credit card. Default value: Pending
Credit Card Types	Website	Determines the credit cards that you accept as payment by Saved CC. Options include: American Express Visa Mastercard Discover JCB Switch/Maestro Solo Other
Request Card Security Code	Website	Determines if customers are required to enter the three-digit security code from the back of the card. If your credit card terminal requires the code, select "Yes." Options include: Yes / No
3D Secure Card Validation	Website	Determines if 3D Secure Card Validation is used to verify credit cards. To use the service, you must subscribe to 3D Secure and complete the configuration for your store. Options include: Yes / No
Severe 3D Secure Card Validation	Website	Removes chargeback liability from the merchant. Options include: Yes / No
Centinel API URL	Website	The URL provided by Centinel that is associated with your 3D Secure Card Validation account.
Payment from Applicable Countries	Website	Determines the countries from which you accept payment by saved credit card. Options include: All Allowed Countries

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
		Specific Countries.
Payment from Specific Countries	Website	Identifies the specific countries from which you accept payment by saved credit card.
Minimum Order Total	Website	Determines the minimum order total that can be paid by saved credit card.
Maximum Order Total	Website	Determines the maximum order total that can be paid by saved credit card.
Sort Order	Website	A number that determines the order that Saved CC appears when listed with other payment methods during checkout. Enter 0 for the top of the list.



CHAPTER 46: PayPal Payment Solutions

PayPal is a global leader in online payments and a fast and secure way for your customers to pay online. With PayPal and Magento Community Edition, 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 PayPal payment methods that are available in Magento, and the method names, are different depending on merchant location. For country-specific PayPal methods, see the list at the end of this chapter. The two PayPal payment methods that can be used all over the world are Express Checkout and PayPal Payments Standard.

PayPal payment methods are mutually exclusive, with the exception of PayPal Express Checkout. You cannot have more than one method enabled at a time. PayPal Express Checkout can be used with other PayPal payment methods except PayPal Payments Standard. PayPal Payments Standard cannot be enabled simultaneously with any other method, including Express Checkout.

Overview

PayPal Express Checkout

With PayPal Express Checkout enabled, customers can click the "Checkout with PayPal" button to make a secure payment from the PayPal site. You can use Express Checkout as a standalone solution, or in combination with one of the other solutions.

PayPal Credit

For US merchants, PayPal Credit is now a payment option during checkout. PayPal Credit, (formerly Bill Me Later) offers your customers access to financing, so they can buy now and pay later, at no additional cost to you. You are not charged when customers choose PayPal Credit, and only pay your normal PayPal transaction fee. You can also use free, ready-made banner ads and a prominent PayPal Credit button in checkout, to tell your customers while they shop that financing is available.

All-In-One Solutions

PayPal offers a variety of PCI-compliant solutions to meet the needs of your growing business.

PayPal Payments Advanced

(Includes Express Checkout) PayPal Payments Advanced offers your customers a secure checkout experience without leaving your site. Flexible templates and a low monthly fee make this an ideal choice for merchants who want to create a more customized checkout experience.

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 Payments Pro Hosted Solution (Includes Express Checkout)
- PayPal Payments Pro Payflow Edition (Includes Express Checkout) (UK only)

PayPal Payments Standard

PayPal Payments Standard is the easiest way to accept payments online. You can offer your customers the convenience of payment by credit card and PayPal by simply adding a checkout button to your site. During checkout, customers are redirected to PayPal to complete the payment part of the checkout process. There are no lengthy applications to complete, or monthly charges to set up in advance. When you make your first sale, PayPal will guide you through the process of setting up your account.

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 Pro is a fully customizable payment gateway that can be used with any Internet merchant account to process credit card transactions online. Payflow Pro can also be used to process PayPal Express Checkout transactions.

PayPal Payflow Link

PayPal Payflow Link is a hosted payment gateway with an embedded checkout that keeps customers on your site. It's the fast and easy way to add transaction processing to your site.

PayPal Access

The PayPal Access Card is like a debit card that can be used to spend or withdraw money from the PayPal balance of the cardholder. It can be used to make purchases online, or anywhere else that MasterCard is accepted. It's like having your PayPal account in your wallet.

PayPal Access streamlines the process of opening an account with your store. When customers with PayPal Access register with your store, their address and contact information is read directly from their PayPal account.

PayPal Business Account

PayPal payment methods that are integrated with Magento require the merchant to have a PayPal business account and/or a PayPal Payflow account. The type of PayPal account that is required is specified in the description of each method.

Customers who make purchases using Express Checkout and the Express Checkout for Payflow Pro must have buyer accounts with PayPal to pay for their purchases. PayPal Payments Standard (and Website Payments Standard) can work either directly or through a buyer account, if the PayPal Account Optional parameter is enabled in the Premier or Business account of the merchant. By default, this parameter is enabled and customers can choose to enter their credit card information and the billing and shipping addresses and pay the order amount, or to create a buyer account with PayPal and then pay the order amount. When the parameter is disabled, the customer must create a buyer account with PayPal before paying for the order.

Website Payments Pro, Website Payments Pro Payflow Edition, Payflow Pro Gateway, and Payflow Link require the customer to enter credit card information during checkout.

Fraud filters can be managed from your PayPal merchant account.

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.

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 used previously is disabled.

Checkout Workflow

With PayPal Payments Advanced, your customer stays on your site during the checkout process. The customer selects the PayPal Payments Advanced payment method on the Payment Information checkout step and clicks Continue.

The Order Review step appears, with the Pay Now button, instead of the Place Order button. After the customer clicks the Pay Now button, a PayPal-hosted form opens in the customer's browser. The customer specifies the card information and clicks Verify Card. If the transaction is successful, the customer is redirected to the order confirmation page. 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.

If the transaction fails for any reason, an error message appears on the checkout page and the customer is directed to repeat the checkout process. These issue are managed by PayPal.

Order Processing Workflow

Processing orders with PayPal Payments Advanced is the same as processing any regular order with PayPal. An invoice, shipment, and credit memo (online/offline refund) can be created. Multiple online refunds are not available for the PayPal Payments Advanced payment method.

With PayPal Payments Advanced, an order is created in the Admin when a customer clicks the Place Order button. The order status can be any of the following, depending on the response from PayPal.

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.

PayPal Payments Advanced cannot be used for orders created from the Admin of your store.

Merchant Requirements

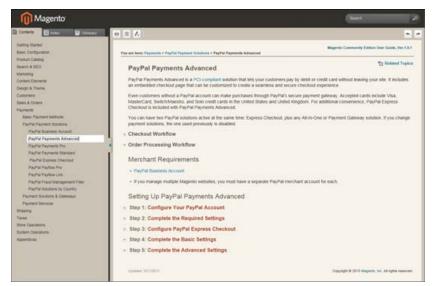


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If you manage multiple Magento websites, you must have a separate PayPal merchant account for each.

Setting Up PayPal Payments Advanced

For step-by-step configuration instructions, see PayPal Payments Advanced in the Magento Community Editiononline 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.

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

After customers add products to their shopping carts, they can go to checkout by clicking the Proceed to Checkout button. In the Payment Information checkout section, they select the PayPal Direct Payment option, and enter the credit card information.

- PayPal Payments Pro lets your customer stay on your site during the checkout process.
- PayPal Express Checkout redirects your customer to the PayPal site to complete the transaction

Order Processing Workflow

If Payment Action is set to "Authorize," Magento creates a sales order with the "Processing" status. In this case, the amount of money to be authorized is pending approval. With PayPal Payments Pro, you can process the payment online from either the Admin of your store, or from your PayPal merchant account. If Payment Action is set to "Sale," Magento creates both a sales order and invoice.

When checking out products from the shopping cart to multiple addresses simultaneously, customers can choose to pay with PayPal Payments Pro. At the customer's request, the store administrator can also create an order from the Admin, and process the transaction with PayPal Payments Pro.

An order can be voided online at any time until the order amount is fully invoiced. If required, the order can be online partially invoiced for a specified quantity of products. For each partial invoice submitted through the PayPal payment system, a separate transaction record with a unique ID and of the Capture transaction type will become available on the Transaction tab, and a separate invoice document will be created on the Invoices tab. The payment transaction of the type "Authorization" is closed only after the full order amount is captured. When capturing the payment transaction, PayPal transfers the order amount from the buyer's balance, bank account or credit card to the merchant's account. 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.

Make sure that instant payment notifications are enabled in your PayPal merchant account. An invoice is created in Magento only after an instant payment notification message is delivered to Magento from PayPal. Based on these notifications, you can receive detailed payment information on each transaction from PayPal after you click the Fetch button on the Transaction page of an order.

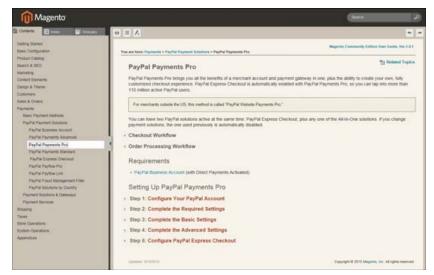
Requirements

 \mathbf{M}

PayPal Business 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 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.

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

During checkout, the customer is redirected to the PayPal site to complete the transaction. PayPal Payments Standard is a one-step process for customers whose credit card information is up-to-date in their personal PayPal accounts. All the customer needs to do is click the "Pay Now" button to complete the purchase.

Merchant Requirements

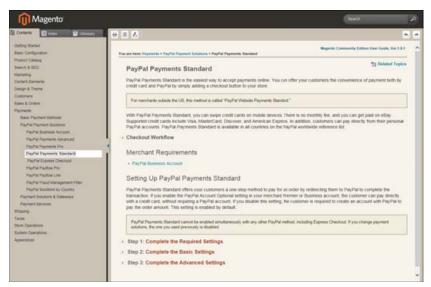


PayPal Business Account

Setting Up PayPal Payments Standard

PayPal Payments Standard cannot be enabled simultaneously with any other PayPal method, including Express Checkout. If you change payment solutions, the one you 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 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 added as a standalone, or added to an existing PayPal solution. If you already accept credit cards online, you can offer Express Checkout as an additional option to attract new customers who prefer to pay with PayPal. PayPal Express Checkout can be used as a standalone, or in combination with one of PayPal's All-In-One solutions.

Checkout Workflow

With Express Checkout, the customer is redirected to the PayPal site to complete the transaction. Unlike other payment methods, PayPal Express Checkout allows the customer to check out at the beginning of the usual checkout flow. With the PayPal Express Checkout enabled, the "Check out with PayPal" button is available on the product page, in the shopping cart, and mini shopping cart. Clicking the button redirects the customer to the PayPal website to review the purchase information. Customers must log in to their PayPal accounts to complete the transaction. The payment system uses the customer's billing and shipping information from the customer's PayPal account. The customer is then redirected back to the Magento Review Order page. After the customer places the order in Magento, the payment information is submitted to PayPal and the payment transaction is settled.

If the customer uses the one-page checkout and selects the Express Checkout payment method, the customer is redirected to PayPal during the Payment Review process, just before the sales order is submitted.

Express Checkout method of payment is unavailable if the customer chooses to check out the products from the shopping cart to multiple addresses. The store administrator cannot place an order using the Express Checkout method of payment, because it is also unavailable from the Admin.

MADISON	SLAND				
WOHEN	hergine.	ACCESSORES	HOME&DECOR	SALE	199
TAKE	AN EXTRA 5			AND DAY AS	R.*
YOUR CAR	Г		The safet, satisf way to pay	-OR- PROCEED TO C	нескоит
PRODUCT			PRICE	QTV.	TOTAL
-	LAFAYETTE CONVERT COLOR: Albe SIZE: 10	BLE DRESS	\$340.00	1 1 EDIT THE FEM MERCINE THE FEM MERCINE THE MERCINE HOLE FEM TO MERCINE +	\$340.00

Check Out with PayPal

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.

No

b. Go to **Service Settings > Hosted Checkout Pages > Set Up**, and make the following settings:

AVS

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.

Step 2: Complete the Required Settings

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, select **Payment Methods**.
- **3.** If your Magento installation has multiple websites, stores or views, set the **Current Configuration Scope** box in the upper-left corner to the target configuration.
- **4.** In the Merchant Location section, select the **Merchant Country** where your business is located.

Merchant Location		٥
Merchant Country	United States (WEBSITE)	

Merchant Location

5. If necessary, click to expand the **PayPal Express Checkout** section. Then, click the **Configure** button.



PayPal Express Checkout

- 6. Under Required PayPal Settings, in the Express Checkout section, complete 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
- 7. When these sections are complete, set **Enable this Solution** to "Yes."
- 8. 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.

Express Checkout			
Express Checkout			
Email Associated with PayPal Merchant Account	▲ Start accepting payments via PayPall	? [WEBSITE]	
API Authentication Methods	API Signature	[WEBSITE]	
API Username		[WEBSITE]	
API Password		[WEBSITE]	
API Signature		[WEBSITE]	
	Get Credentials from PayPal Sandbox Crede	ntials	
Sandbox Mode	Yes	[WEBSITE]	
API Uses Proxy	No	[WEBSITE]	
nable this Solution	No	[WEBSITE]	
nable Paypal Credit	No ▲ PayPal Express Checkout lets you give customers access to financing through Paypal Credit® - at no	[WEBSITE]	
	additional cost to you. You get paid up front, even though customers have more time to pay. A pre-		
	integrated payment button lets customers pay quickly with Paypal Credit®. <u>Learn More</u>		

PayPal Express Checkout Required Settings

Step 3: Complete the Basic Settings

- **1.** If your store has multiple views, make sure to set the **Current Configuration Scope** box in the upper-left corner to the view where these settings apply.
- 2. In the Basic Settings PayPal Express Checkout section, complete the following:
 - **a.** Enter a **Title** to identify this payment method during checkout. It is recommended to set the title to "PayPal" for each store view.
 - **b.** 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.
 - 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.

Order	The amount of the order is neither captured nor authorized in the customer's balance, bank account, or credit card at PayPal. The Order payment action represents an agreement between the PayPal payment system and the merchant, which enables the merchant to capture one or more amounts up to the "ordered" total from the customer's buyer account, over a maximum of 29 days. After the funds are "ordered," the merchant can capture them at any time during the following 29 days. Capturing of the order amount can be done only from the Magento backend, by creating
	one or more invoices.

d. If **Payment Action** is set to "Order," complete the following fields:

Authorization Honor Period (days)	Defines how long the primary authorization stays valid. The value should be equal to the corresponding value in your PayPal merchant account. The default value in your PayPal merchant account is 3. To increase this number you need to contact PayPal. The authorization becomes invalid at 11:49 p.m., U.S. Pacific Time, of the last day.
Order Valid Period (days)	Defines how long the order remains valid. When the order becomes invalid, you can no longer create invoices for it. Specify the value equal to the Order Valid Period value in your PayPal merchant account. The default value in your PayPal merchant account is 29. To change this number, you need to contact PayPal.
Number of Child Authorizations	Defines the maximum number of authorizations for one order; that is, the maximum number of the online partial invoices you can create for one order. The number in this field should be equal to the corresponding setting in your PayPal merchant account. The default number of child authorizations in your PayPal account is 1. To increase this number, you need to contact PayPal.

e. To display the "Check out with PayPal" button on the product page, set **Display on Product Details Page** to "Yes."

Basic Settings - PayPal Express	Checkout		*
Title	PayPal Express Checkout	[STORE VIEW]	
	It is recommended to set this value to "PayPal" per store views.		
Sort Order		[STORE VIEW]	
Payment Action	Authorization	[WEBSITE]	
Display on Product Details Page	Yes	[STORE VIEW]	
Advanced Settings •			

Basic Settings - PayPal Express Checkout

Step 4: Complete the Advanced Settings

- **1.** At the bottom of the Basic Settings section, click to expand **Advanced Settings**. Then, complete the following:
 - a. Set **Payment Applicable From** to one of the following:

All Allowed Countries	Accepts payment from the countries already specified in your configuration.
Specific Countries	Accepts payments from only the countries you specify. Hold the Ctrl key down and in the Payment Applicable From list, click each country where you accept payment.

b. Set **Debug Mode** to "Yes" to write communications with the payment system into the log file. 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.

- c. To enable host authenticity verification, set Enable SSL Verification to "Yes."
- **d.** 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.)

e. To determine the type of image used for the PayPal acceptance button, set **Shortcut Button 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.

- f. To allow customers without PayPal accounts to make a purchases with this method, set **Enable PayPal Guest Checkout** to "Yes."
- g. 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.

h. 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.

The store owner needs to apply to PayPal Merchant Technical Support to enable billing agreements. The Billing Agreement Signup parameter must be enabled only after PayPal confirms that billing agreements are enabled for your merchant account.

i. 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."

isplay on Shopping Cart	Yes (PayPal recommends this option)	-	[STORE VIEW]
	Also affects mini-shopping cart.	_	
ayment Applicable From	All Allowed Countries	•	[WEBSITE]
ebug Mode	Yes	•	[WEBSITE]
nable SSL verification	Yes	-	[WEBSITE]
ransfer Cart Line Items	Yes	•	[WEBSITE]
ransfer Shipping Options	No	▼ ?	[WEBSITE]
	Notice that PayPal can handle up to 10 shipping		
	options. That is why Magento will transfer only first		
	cheapest shipping options if there are more than 10 available.)	
hortcut Buttons Flavor	Static	-	[STORE VIEW]
nable PayPal Guest Checkout	No	-	[WEBSITE]
	Ability for buyer to purchase without PayPal accourt	nt.	
Require Customer's Billing	No	-	[WEBSITE]
Require Customer's Billing		-	[WEBSITE]
· · ·	No	-	[WEBSITE]
· · ·	No A This feature needs be enabled first for the merchan	-	[WEBSITE]
ddress	No A This feature needs be enabled first for the merchan account through PayPal technical support. Ask Customer & Whether to create a billing agreement, if there are not account through PayPal technical support.	▼ nt	
ddress	No A This feature needs be enabled first for the merchan account through PayPal technical support. Ask Customer	▼ nt	

PayPal Express Checkout 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. To make billing agreements available to your customers, click to 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	No	[WEBSITE]
Transfer Cart Line Items	No •	[WEBSITE]
Allow in Billing Agreement Wizard	Yes v	[WEBSITE]

PayPal Billing Agreement Settings

Settlement Report Settings

- 1. Click to expand the **Settlement Report Settings** section.
- **2.** If you have signed up for PayPal's Secure FTP Server, enter the following SFTP login credentials:

- Login
- Password
- **3.** To run test reports before "going live" with Express Checkout on your site, set **Sandbox Mode** to "Yes."
- **4**. Enter the **Custom Endpoint Hostname or IP Address**. By default, the value is: reports.paypal.com
- **5.** Enter the **Custom Path** where reports are saved. By default, the value is: /ppreports/outgoing
- **6.** To generate reports according to a schedule, under Scheduled Fetching, make the following settings:
 - a. Set Enable Automatic Fetching to "Yes."
 - **b.** Set **Schedule** to one of the following:
 - Daily
 - Every 3 Days
 - Every 7 Days
 - Every 10 Days
 - Every 14 Days
 - Every 30 Days
 - Every 40 Days

PayPal retains each report for forty-five days.

c. Set **Time of Day** to the hour, minute, and second when you want the reports to be generated.

Settlement Report Settings			٨
SFTP Credentials			
Login			[WEBSITE]
Password			[WEBSITE]
Sandbox Mode	No	•	[WEBSITE]
Custom Endpoint Hostname or IP- Address	By default it is "reports.paypal.com".	?	[WEBSITE]
Custom Path	By default it is "/ppreports/outgoing".		[WEBSITE]
Scheduled Fetching			
Enable Automatic Fetching	No	•	[WEBSITE]
Schedule	Daily A PayPal retains reports for 45 days.	•	[GLOBAL]
Time of Day	00 💌 : 00 💌 : 00 💌		[GLOBAL]

PayPal Settlement Report Settings

Frontend Experience Settings

The frontend experience settings give you the opportunity to choose which PayPal logos appear on your site, and to customize the appearance of your PayPal merchant pages.

- 1. Click to expand the Frontend Experience Settings section.
- **2.** Select the **PayPal Product Logo** that you want to appear in the PayPal block in your store. The PayPal logos are available in four styles and two sizes. Options include:
 - No Logo
 - We Prefer PayPal (150 x 60 or 150 x 40)
 - Now Accepting PayPal (150 x 60 or 150 x 40)
 - Payments by PayPal (150 x 60 or 150 x 40)
 - Shop Now Using PayPal (150 x 60 or 150 x 40)
- 3. To customize the appearance of your PayPal merchant pages, do the following:
 - **a.** Enter the name of the **Page Style** that you want to apply to your PayPal merchant pages. Options include:

paypal	Uses the PayPal page style.
primary	Uses the page style that you identified as the "primary" style in your account profile.
your_custom_value	Uses a custom payment page style, which is specified in your account profile.

b. In the **Header Image URL** field, enter the URL of the image that you want to appear in the upper-left corner of the payment page. The maximum file size is 750 pixels wide by 90 pixels high.

PayPal recommends that the image be located on a secure (https) server. Otherwise, the customer's browser may warn that "the page contains both secure and nonsecure items."

c. Enter the six-character hexadecimal code, without the "#" symbol, for each of the following:

Header Background Color	Background color for the checkout page header
Header Border Color	2-pixel border around the header.
Page Background Color	Background color for the checkout page and around the header and payment form.

Frontend Experience Settings				A
PayPal Product Logo	No Logo Displays on catalog pages and homepage.	•	[STORE VIEW]	
PayPal Merchant Pages Style	9			
Page Style		?	[STORE VIEW]	
Header Image URL		?	[STORE VIEW]	
Header Background Color		?	[STORE VIEW]	
Header Border Color		?	[STORE VIEW]	
Page Background Color		?	[STORE VIEW]	

PayPal Frontend Experience Settings

3. When complete, click the **Save Config** button.

Save Customer Billing Address

The complete billing address of the customer can be saved when the customer pays with PayPal Express Checkout. The billing address can be received from PayPal, and can be edited by the customer. Make sure that your PayPal merchant account is configured to save the customer billing address. Contact PayPal technical support for more information.

Billing Address Workflow

When customers choose to pay using PayPal Express Checkout, they are redirected to PayPal. After logging in to PayPal and reviewing the payment information, they are redirected back to the Order Review page of your store, where they can complete the checkout process and place the order.

If you have set up your PayPal Express Checkout Advanced settings to skip the order review step, the customer can pay for the order on the PayPal site by clicking the Pay Now button.

If a billing address cannot be received from PayPal because of your configuration or due to any other reasons, the billing address fields on the Order Review page are prepopulated with the shipping address values. A customer can edit them if necessary.

If a customer leaves the billing and shipping addresses without changes, the Place Order button is enabled when the customer selects the shipping method in the Shipping Method field.

If the customer edits the billing or shipping address, the Place Order button is disabled. The customer needs to click the Update Order Data button first. The system will update the information, including the available shipping methods, and the Place Order button will be enabled. After the customer clicks Place Order, the order is created in Magento, and PayPal performs the related transaction(s). The complete billing and shipping addresses are saved in the order record in Magento.

To save the customer billing address:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select Payment Methods.
- 3. Under PayPal Express Checkout, click the **Configure** link, and do the following:
 - a. Set Require Customer's Billing Address to "Yes."
 - b. To request the customer's billing address only for orders with downloadable and/or virtual products, set Require Customer's Billing Address to "For Virtual Quotes Only."
- 4. Click the **Save Config** button.

Managing Order Transactions

Magento includes the option to use the Order payment action for the PayPal Express Checkout payment method. When a store customer submits an order, having paid using the PayPal Express Checkout payment method, for which the Order payment action is set, the funds on the customer's card are authorized. If the authorization times out before you capture all payment, the authorization is voided, and a new authorization and capture are conducted when you create an invoice. Only the amount equal to the invoice total is authorized and captured. The maximum number of these authorizations for one order, and the periods for which the first authorization and the order in general stay valid, depend on your PayPal merchant account settings. These parameters need to be specified in the Magento Admin Panel as well. Capturing can be done only from the Magento Admin Panel, by creating one or more invoices.

Situations in which using the Order transaction may be appropriate include the following:

- Back orders, in which available items are sent immediately, and the remaining part of the order is sent when available; this may include more than two shipments
- Split orders, in which ordered items are sent in more than one shipment, perhaps to different addresses, and you want to collect a payment for each shipment
- Drop shipments, which are shipments from other vendors for which you accept the payment

Using the Order payment action does not influence the checkout process for store customers.

Payment Action Set to "Order"

When the store customer submits the order, having paid using the PayPal Express Checkout payment method, for which the Order payment action is set, the order (with Processing status) is created in the Admin. Two transactions are created for this order: one with type Order and one with type Authorization.

The funds on the customer's account are put on hold, and you can capture the payment only from the Admin. To capture, you need to create an online invoice. When you choose to create an online invoice, Magento determines whether the number of days passed from the first authorization exceeds the Order Valid Period value. If more days have passed, you cannot create an online invoice for this order.

If the order is valid, Magento determines whether the first authorization is valid, comparing the number of days passed with the Authorization Honor Period value. If the authorization is valid, the necessary sum is captured; the rest is left on hold, and the number of captures is not limited. If the authorization is not valid anymore, it is voided. A new authorization and capture are created, but for the invoice total (not the order total). From this moment, each time you create an online invoice for this order, a new authorization and capture will be conducted only for invoice totals.

Also, Magento will determine whether the number of the conducted captures is equal to the Number of Child Authorizations value each time. If the number specified there is already reached, creating online invoices for the order will not be possible.

PayPal Credit

For US merchants, PayPal Credit is now a payment option during checkout. PayPal Credit, (formerly Bill Me Later) offers your customers access to financing, so they can buy now and pay later, at no additional cost to you. You are not charged when customers choose PayPal Credit, and only pay your normal PayPal transaction fee. You can also use free, ready-made banner ads and a prominent PayPal Credit button in checkout, to tell your customers while they shop that financing is available.



PayPal Credit

According to an August 2013 Forrester Consulting study commissioned by PayPal, PayPal Credit (Bill Me Later) can increase sales up to 18%, with about one-third resulting from the six months' same-as-cash payment option. To learn more, visit the PayPal site.

Before you configure PayPal Credit in your store, make sure it is enabled in your PayPal account .

To enable PayPal Credit:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select Payment Methods.
- **3.** Under PayPal Express Checkout, or one of the All-In-One solutions that includes PayPal Express Checkout, click the **Configure** link. Then, do the following:
 - a. Click to expand Required PayPal Settings.
 - b. Set Enable PayPal Credit to "Yes."
- 4. Click the **Save Config** button.

Express Checkout		Å
Email Associated with PayPal Merchant Account	Start accepting payments via PayPall [WEBSITE]	
API Authentication Methods	API Signature [WEBSITE]	
API Username	[WEBSITE]	
API Password	[WEBSITE]	
API Signature	[WEBSITE]	
	Get Credentials from PayPal Sandbox Credentials	
Sandbox Mode	Yes [WEBSITE]	
API Uses Proxy	No (WEBSITE)	
Enable this Solution		
Enable Paypal Credit	No A PayPal Express Check access to financing thre additional cost to you. though customers have have more america integrated payment button lets cust, are pay quickly with Paypal Credit®. Learn More	

Learn More about PayPal Credit

To enable PayPal Credit banners:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**.
- **3**. Under PayPal Express Checkout, click the **Configure** link.
- 4. Click to expand **Required PayPal Settings** section. Then, click to expand **Advertise PayPal Credit** section.

Advertise Paypal Credit		
Why Advertise Financing?		
Give your sales a boost v	when you advertise financing.	
PayPal helps turn browsers	s into buyers with financing from Paypal Credit®. Your customers have more time to pay, while yo	ou get paid
up front – at no additional c	ost to you. Use PayPal's free banner ads that let you advertise Paypal Credit® financing as a pay	yment option
when your customers chec	k out with PayPal. The PayPal Advertising Program has been shown to generate additional purch	ases as
well as increase consumer'	's average purchase sizes by 15% or more. See Details.	
	DATOONTE)	
ublisher ID	[WEBSITE]	
	Required to display a banner	
	Required to display a banner Get Publisher ID from PayPal	
Home Page		Ŧ
Home Page Catalog Category Page		Ţ

Advertise PayPal Credit

- 5. Click the **Get Publisher ID from PayPal** button and follow the directions to get your account information. Then, enter your **Publisher ID**.
- 6. Click to expand the **Home Page** section. Then, do the following:
 - a. To place a banner on the page, set **Display** to "Yes."
 - **b.** Set **Position** to one of the following:
 - Header (center)
 - Sidebar (right)
 - **c.** Set **Size** to one of the following:
 - 190 x 100
 - 234 x 60
 - 300 x 50
 - 468 x 60
 - 728 x 90
 - 800 x 66
- 7. Repeat the previous step for each of the following sections:
 - Catalog Category Page
 - Catalog Product Page
 - Checkout Cart Page
- 8. When complete, click the **Save Config** button.

190 x 100	
234 x 60	
300 x 50	
468 x 60	
728 x 90	
800 x 66	

These examples do not represent the actual size of the banners, but show their relative shape and proportion.

Billing Agreements

The Billing Agreement functionality enables customers to sign an agreement with the payment system and eases the process of checkout because customers do not need to specify payment information again and again. During the shopping cart checkout, the customer can simply choose a billing agreement as a payment method and based on its number; the payment system will charge the customer's account. The store administrator can manage customer's billing agreements from both the Customer and Sales sections of the Admin menu.

Sales Management

The list of all billing agreements for all customers is available under Sales > Billing Agreements. Here, the store administrator can filter the records by the customer or billing agreement information including billing agreement reference ID, status, and creation date. A specific record provides general information about the selected billing agreement and about all sales orders that relate to it. The store administrator can view, cancel, or delete a customer's billing agreements in the Sales Management area. Billing agreements can be canceled or deleted by clicking the corresponding buttons located in the upper right part of the Billing Agreement page. An already canceled billing agreement can only be deleted by the store administrator.

Customer Management

Billing agreements created by a single customer can be seen on the Billing Agreements tab of the customer account page in the Admin (Customers > Manage Customers). From here, the store administrator can open a required billing agreement to view its general information and sales orders relating to it, cancel a billing agreement, or delete it.

Customer Account Workflow

Customers can create billing agreements by signing in to their customer accounts, selecting the billing agreement payment method, and initiating the Billing Agreement process. When a billing agreement is created, it is submitted to the PayPal payment system and recorded in the customer account, along with reference information. There is no limit to the number of billing agreements a customer can create. The customer can also cancel some, or all of the billing agreements on the Billing Agreement page of the customer account. The status of each billing agreement is shown as either "Active" or "Canceled." When a billing agreement is canceled, it cannot be reactivated.

When checking out products from the shopping cart, a customer who has already entered into a billing agreement with PayPal can choose the PayPal Billing Agreement payment method in the Payment Information section of the checkout page, and select the billing agreement reference ID from the list. When the customer places the order, the billing agreement reference ID and sales order payment details are transferred to the PayPal payment system. After the payment system confirms the payment, a sales order is created in Magento.

Sales Order Workflow

Customers who do not yet have a billing agreement with PayPal can choose PayPal Express Checkout, and select "Sign a billing agreement" to streamline the process. They are then redirected to the PayPal payment system where the billing agreement can be signed. After the billing agreement is signed, the customer returns to the checkout page. where the order is placed. A corresponding record appears in the billing agreements list.

Customers can also sign a billing agreement from the mini shopping cart or product page by clicking the "Check out with PayPal" button. When making a purchase with PayPal Express Checkout, the customer can choose to enter into a billing agreement PayPal. If the customer cancels creating a billing agreement, the order is created through the normal PayPal payment process.

Customers with one or more billing agreements can still create a new billing agreement from their customer account, but cannot enter into a new billing agreement through PayPal Express Checkout.

When the customer signs a billing agreement during checkout, PayPal creates a payment transaction through ayPal Express Checkout, and a billing agreement reference ID is sent to the customer and to the store. The current order is not related to the billing agreement that is signed. Related billing agreement order records are created the next time the customer chooses to use the billing agreement as a payment method to place an order.

To enable billing agreements:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**.
- 3. Click the **Configure** button for one of the following PayPal solutions:
 - PayPal Express Checkout
 - PayPal Payments Advanced (includes Express Checkout)
 - PayPal Payments Pro (includes Express Checkout)
- 4. Scroll down to the PayPal Billing Agreement Settings section, and do the following:
 - a. Set Enabled to "Yes."
 - 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."
- 5. When complete, click the **Save Config** button.

PayPal Billing Agreement Settings		Å
Enabled	Yes Will appear as a payment option only for customers who have at least one active billing agreement.	(WEBSITE)
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	No	[WEBSITE]
Transfer Cart Line Items	No	[WEBSITE]
Allow in Billing Agreement Wizard	Yes 🔻	[WEBSITE]

PayPal Billing Agreement Settings

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 contact PayPal Merchant Technical Services to create an SFTP user account, and enable settlement reports and SFTP for the PayPal business account.

After configuring and enabling settlement reports in the PayPal merchant account, Magento will start generating reports within twenty-four hours.

The store administrator can fetch the most recent settlement reports by clicking the Fetch Updates button located in the upper right part of the page. After clicking it, a dialog box appears, stating that the system will connect to the PayPal SFTP server to fetch the reports. When all recent reports are added to the list, the Infolog message appears, stating the number of reports fetched. The report includes the following additional information for each transaction:

To enable settlement reports:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select Payment Methods.
- 3. Click the **Configure** button for one of the following PayPal solutions:
 - PayPal Express Checkout
 - PayPal Payments Advanced (includes Express Checkout)
 - PayPal Payments Pro (includes Express Checkout)
- 4. Scroll down to the Settlement Report Settings section, and do the following:
 - a. Enter your SFTP Credentials.
 - **b.** Complete the remaining information according to your business requirements.

For detailed configuration instructions, see the knowledge base article for your PayPal solution.

c. When complete, click the Save Config button.

Settlement Report Settings				*
SFTP Credentials				
Login			[WEBSITE]	
Password			[WEBSITE]	
Sandbox Mode	No	•	[WEBSITE]	
Custom Endpoint Hostname or IP-Address	▲ By default it is "reports.paypal.com".	?	[WEBSITE]	
Custom Path	▲ By default it is "/ppreports/outgoing".		[WEBSITE]	
Scheduled Fetching				
Enable Automatic Fetching	No	•	[WEBSITE]	
Schedule	Daily A PayPal retains reports for 45 days.	•	[GLOBAL]	
Time of Day	00 ▼ : 00 ▼ : 00 ▼		[GLOBAL]	

Settlement Report Settings

To view the settlement reports:

On the Admin menu, select **Reports > Sales > PayPal Settlement Reports.**

Field Descriptions

FIELD	DESCRIPTION	
PayPal Reference ID Type	One of the following reference Order ID Transaction ID Subscription ID	e codes:
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.

Settlement Report

FIELD	DESCRIPTION
Report Date	The date when the settlement report was generated.
Merchant Account	The encrypted merchant account number generated by PayPal.

Settlement Report (cont.)

FIELD	DESCRIPTION
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.

PayPal Payflow Pro

PayPal Payflow Pro gateway, formerly known as Verisign, is a payment method available for customers of the USA, Canada, Australia, and New Zealand. Similar to other PayPal payment methods that are provided in Magento, PayPal Payflow Pro Gateway requires that the store owner have a merchant account at PayPal. The PayPal Payflow Pro gateway links the merchant account at PayPal and the merchant's website, and acts both as a gateway and a merchant account. With PayPal Payflow Pro Gateway, payments are processed directly on the merchant websites and customers are not redirected to PayPal. Unlike other PayPal payment methods, the pricing for using the Payflow Pro Gateway method of payment is fixed no matter how many transactions are submitted. That is, merchants pay a fixed monthly fee plus a fixed fee for each transaction regardless of their number.

PayPal Payflow Pro allows customers to enter their credit card information during checkout, without leaving the store checkout page and without using PayPal hosted forms. Additionally, payments are accepted through PayPal Payflow Pro at the time an order is placed. PayPal Payflow Pro does not require customers to have buyer accounts at PayPal; but depending on the merchant country, customers may use their PayPal buyer accounts for paying through the gateway. You can view all Payflow Pro Gateway transactions in your PayPal business account.

Customer Workflow

After customers add products to their shopping carts and proceed to the checkout, they specify their billing and/or shipping addresses and the shipping method. Then, in the Payment Information section of the Checkout page, they can select the Payflow Pro payment method, enter the type of credit card, its number, expiration date, and the card verification number. Customers are not redirected to the PayPal website when they choose to pay with Payflow Pro Gateway. Depending on the payment action selected in the configuration of the payment method, either a sales order or a sales order and an invoice is created.

Order Processing Workflow

Orders paid with Payflow Pro Gateway can be processed online only from Magento. Here, you can submit an online invoice and as a result a corresponding transaction and an invoice will be created. Regarding order amount refunds, you can also submit them online from the created invoice.

Partial invoices are not available when using PayPal Payflow Pro. The Qty to Invoice field is unavailable for editing. The partial refund is unavailable as well.

PayPal Payflow Link

PayPal PayFlow Link is available for merchants in the United States and Canada only; this method requires a Payflow merchant account. PayFlow Link cannot be used for orders created from the Admin.

In general, order processing with PayPal PayFlow Link is the same as processing orders with PayPal. An invoice, shipment, and credit memo (online/offline refund) can be created. PayPal Payflow Link passes the card information directly to PayPal. It is never stored in Magento system. The customer is not required to have a PayPal account to use this method. Multiple online refunds are not available with PayPal PayFlow Link.

Customer Workflow

The customer selects the PayFlow Link payment method on the Payment Information checkout step and clicks Continue. The Order Review step appears, where the Pay Now button is available instead of the usual Place Order button. After the customer clicks Pay Now, the PayPal-hosted form, where the credit card information can be entered, loads in the checkout page. The customer specifies the card information and clicks Pay Now. If the transaction is successful, the customer is redirected to the order confirmation page.

The Cancel Payment link redirects the customer to the Payment Information step of the checkout, with the payment method selected. 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.

Order Workflow

When a customer clicks the Pay Now button on the last checkout step, the order is created with a "Pending Payment" status. After the customer enters the card information and clicks the Pay Now button on the PayPal site, the status of the order changes, depending on the response the system receives from PayPal. If the customer clicks the Cancel Payment link, the order status changes to Canceled. The new order is created when a customer proceeds with the checkout.

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.

PayPal Fraud Management Filters

Magento Community Edition supports PayPal fraud management filters for owners of Website Payments Pro PayPal accounts. The filers can be used for orders that are paid by PayPal Express Checkout or PayPal Website Payments Pro. Fraud management filters are managed through your PayPal merchant account.

PayPal fraud management filters make it easier to detect and respond to fraudulent transactions, and can be configured to flag, hold for review, or deny riskier payments. Magento order status values changed according to the fraud filter settings.

Filter Actions

ACTION	DESCRIPTION
Review	If you set the filter action to "Review," the suspected order receives the status "Payment Review" when the order is placed. You can review the order and approve, or cancel the payment in the Admin, or on the PayPal side. When you click the Accept Payment or the Deny Payment buttons, no new transactions for the order are created.
	If you change the status of the transaction on the PayPal site, you must click the Get Payment Update button in the upper-right corner of the Order page in the Admin to apply the changes. If you click Accept Payment or Deny Payment, the changes made at the PayPal site are applied.
Deny	If you set the filter action to "Deny," the suspected order cannot be placed by the customer, because the corresponding transaction is rejected by PayPal.
	To deny the payment from the Admin, click the Deny Payment button in the upper-right corner of the page. The order status changes to "Canceled," the transaction is reverted, and funds are released on the customer's account. The corresponding information is added in the Comments History section of the order view.
Flag	If you set the filter action to "Flag", the suspected order gets the status "Processing" when it is placed. The corresponding transaction is marked with a "flag" in the list of the merchant account transactions.

PayPal Solutions by Country

PayPal Solutions

COUNTRY	PAYPAL PAYMENT SOLUTION
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
Canada	PayPal Payments Pro (Includes Express Checkout) PayPal Payments Standard PayPal Payflow Pro PayPal Payflow Link (Includes Express Checkout) PayPal Express Checkout
Australia	PayPal Payments Standard PayPal Payflow Pro PayPal Payments Pro Hosted Solution PayPal Express Checkout
United Kingdom	PayPal Express Checkout PayPal Payments Standard PayPal Payments Pro Payflow Edition (Includes Express Checkout) PayPal Payments Pro Hosted Solution
Japan	PayPal Express Checkout PayPal Payments Standard PayPal Website Payments Plus (PayPal Payments Pro Hosted Solution)
France	PayPal Express Checkout PayPal Payments Standard PayPal Integral Evolution (PayPal Payments Pro Hosted Solution)
Italy	PayPal Express Checkout PayPal Payments Standard PayPal Pro (PayPal Payments Pro Hosted Solution)

COUNTRY	PAYPAL PAYMENT SOLUTION
Spain	PayPal Express Checkout PayPal Payments Standard PayPal Pasarela integral (PayPal Payments Pro Hosted Solution)
Hong Kong	PayPal Express Checkout PayPal Payments Standard PayPal Payments Pro Hosted Solution
New Zealand	PayPal Express Checkout PayPal Payments Standard PayPal Payflow Pro
Others	PayPal Express Checkout PayPal Payments Standard

PayPal Solutions (cont.)



CHAPTER 47: Payment Solutions & Gateways

Magento Community Edition supports a wide range of payment solutions and gateways that offer merchant services in all parts of the world. Unlike some payment solutions that transfer control to complete the transaction on another site, a payment gateway makes it possible for you to accept credit card payments directly from your store.

MADISON ISLAND					
VICHEN HEN	ACCESSORES	HOHE & DECO		SALE	VP.
CHECKOUT					
BILLING INFORMATION	SHIPPING INFORMATION	SHIPPING METHOD	PAYMENT INF	ORMATION	ORDER REVIE
* PAYPAL PAYHENTS PRO					
* Cavil Type:			BILLIN	G ADDRESS	00
-Please Select-	• 💷 🎫 🚥			Smith Street	
* Card Number			Las. Daž	Angeles, California. Af Skatur 18-888-8888	apola
* Expiration Date:			SHIPP	NG ADORESS	620.2
Month True	•		Mab Las. Unit	Death Street Ingeles, California, nd States 10-808-8888	x3045
WHAT IS PAYPALT			SHIPP	NG METHOD	1011
O CASH ON DELIVERY			Ded	Way - Table Rate \$3	5.00
To add or remove gift cards, dock fere			PAYM	NT METHOD	
		nited Fields			

Checkout Payment Information

Payment Solutions by Region

Worldwide

Amazon Simple Pay

Amazon offers easy payment and checkout solutions for physical goods retailers that allow customers to use their Amazon.com accounts as a payment method. Magento Community Edition supports the following payment solutions from Amazon:

- Amazon Simple Pay
- Checkout by Amazon

PayPal

With PayPal's deep integration with Magento, you can easily accept credit cards and PayPal payments using PayPal, all while keeping customers on your site. Already have a merchant account? Add PayPal Express checkout to increase conversion.

Authorize.Net

Authorize.Net includes free fraud tools, free customer support, a free website seal, and the ability to accept multi-channel payments: online, mail order/telephone order, retail and mobile. Trusted by 300,000 customers.

ChronoPay

Established in Amsterdam in 2003, ChronoPay offers payment solutions for the global market. The company has a large presence in the Russian market. Magento Community Edition supports the following ChronoPay payment solutions:

- ChronoPay Standard
- ChronoPay Gateway

CyberSource

CyberSource, a wholly-owned subsidiary of Visa Inc., is a payment management company. Over 330,000 businesses worldwide use CyberSource to process online payments, streamline fraud management, and simplify payment security.

First Data

Fast, convenient, and secure. With over forty years of industry leading experience Express Merchant Processing Solutions (EMPS) powered by First Data helps millions of businesses like yours bring safe, easy, cost-effective payments to their customers with affordable support, regardless of size.

Europe

CyberMut Payment

CyberMut is a secure payment service operated by the French Bank, Crédit Mutuel. To use CyberMut, you must open a business account with the bank.

iDEAL

iDEAL is a collection of technical agreements between banks and transaction processors (a protocol) and not a centralized electronic payment system. The iDEAL protocol provides an immediate online transfer from the buyer's bank account to the bank account of the online store. Magento Community Edition support the following iDEAL payment solutions:

- iDEAL Basic
- iDEAL Advanced

Ogone

Ogone Payment Services delivers non-face-to-face businesses the payment solutions platform, added value opportunities and technology advancements that become essential for the way payments are performed, managed and secured today.

Paybox

Paybox Services provides merchant accounts and eCommerce payment services for merchants in Europe. Magento Community Edition supports the following Paybox payment methods:

- Paybox Direct
- Paybox System

Protx Standard

Protx is one of the largest payment processors in the United Kingdom. In 2006, Protx was acquired by Sage Pay.

Oceania

eWAY Direct

Focusing on high-level standards in technology, innovations and customer care, eWay has become Australia's award-winning payment gateway. eWAY specializes in delivering successful eCommerce payment gateway services to thousands of merchants. Magento Community Edition supports the following eWAY payment methods:

- eWAY Direct
- eWAY Shared
- eWAY 3D Secure

Flo2Cash Payment Web Service

New Zealand-based Flo2Cash provides and approves Credit Card and Direct Debit facilities and is a leading provider of payment processing services and solutions, which enables businesses of all sizes to streamline their payment processes; this in turn improves cash flow and reduces operating expense.

Testing Credentials

When testing the configuration of a payment gateway, use the following credentials for test transactions.

Visa	41111111111111
MasterCard:	555555555554444
American Express:	378282246310005
Expiration Date:	Any future date
CVV/CVC:	123 or 000

Authorize.Net

Authorize.Net gives merchants the ability to accept credit card and payments through the Authorize.Net payment gateway. It processes the credit card information entered during checkout, and creates a transaction either for the payment authorization or for the payment authorization and a capture of the funds, depending on the configuration.

Authorize.Net can be used to pay for purchases made from the storefront or for orders placed from the Admin. Orders that use the Authorize.Net payment method can be processed from your store's Admin and also from the Authorize.Net merchant account.Based on the response that Magento receives from Authorize.Net, an order is created in Magento with an assigned Authorize.Net transaction number.

Capture Workflow

Authorize.Net does not allow partial invoices to be created from Magento. The Qty to Invoice field cannot be edited on the New Invoice for Order page. When an invoice is captured online, a corresponding document with status of "Paid" is created and appears in the list of Invoices. In addition, a Capture transaction is added to the list of Transactions.

You can partially capture the order amount from the Authorize.Net merchant account. However, Authorize.Net does not allow for the remaining amount to be captured. In the case of a partial capture from Authorize.Net, no invoice or transaction is created in Magento for the order.

To find an order:

- 1. On the Admin menu, select **Sales > Orders**.
- **2.** In the list, click to open the order.
- **3.** On the order detail page, click the **Invoice**button.

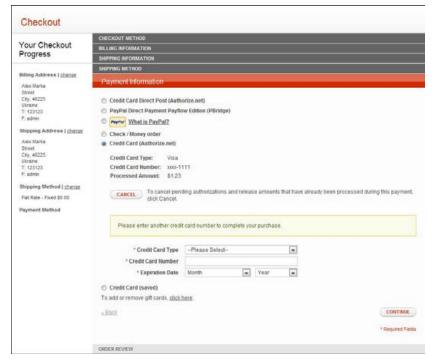
The Amount field of the order has the following payment actions:

PAYMENT ACTION	DESCRIPTION
Capture Online	When an invoice is submitted, the system captures the payment amount through the external payment gateway. In this case, an invoice and a transaction of the "Capture" type are added to the order detail page. If a payment is captured online, you can later create an online credit memo from the invoice, if required.
	A payment capture transaction can be voided only from your Authorize.Net merchant account.
Capture Offline	When an invoice is submitted using this option, the does not capture the payment, and only an offline invoice is created in Magento. It is assumed that the payment will be captured directly through the payment gateway, and you do not have the option to capture the payment online through Magento.
Not Capture	When an invoice is submitted using this option, Magento does not capture the payment, and no corresponding transaction is created in the Authorize.Net merchant account. However, it is assumed that you will capture the payment online through Magento at a later date. Therefore, the Capture button is available in the completed invoice, which has a status temporarily set to "Pending."
	The order can be canceled at any time before the payment is captured. After the payment has been captured, a credit memo must be generated to cancel the order.

Payment Actions

Partial Authorization with Authorize.Net

Authorize.Net gives you the ability to accept multiple credit cards as payment for a single order. If there isn't enough remaining balance on a single card to cover the purchase, the amount can be distributed across multiple cards. Up to five credit cards can be used to pay for a single order. Partial authorization can be activated in the Authorize.Net configuration at either the global, or website level.



Partial Authorization During Checkout

Customer Workflow

During the checkout process, the customer selects Authorize.Net, enters the card information, and proceeds to Order Review. When the customer clicks the Place Order button, the request is sent to Authorize.Net. If the amount available on the card is not enough to cover the order total, the following message appears:

The amount on your credit card is insufficient to complete your purchase. The available amount has been put on hold. To complete your purchase, click Continue and specify additional credit card number. To cancel the purchase and release the amount on hold, click Cancel.

If the customer chooses to continue, the Payment Information checkout step reappears, and the customer is prompted to enter another credit card. The information about the previously used credit cards appears as well.

If the customer clicks the Cancel button, all authorizations are reversed. The customer can then choose another payment method to complete the purchase. If the customer closes the browser window, the authorizations remain active until they expire. The term of each authorization depends on the bank that issued the credit card. An order is created only after the total amount of the order is captured.

If the customer reaches the limit of five cards that can be used for one order, the following message appears during Order Review:

You have reached the maximum number of credit cards that can be used for the payment.

When the customer clicks the OK button, the Payment Information checkout step reappears, with the following message:

You have reached the maximum number of credit cards that can be used for one payment. The available amounts on all used cards were insufficient to complete payment. The payment has been canceled and amounts on hold have been released.

The system sends a request to Authorize.Net to void all authorizations of this payment. The customer can now choose another payment method, or try a different credit card.

During partial authorization, the bank might reject the transaction, For example, the daily limit for the card might be exceeded. In this case, Authorize.Net sends the appropriate response to Magento and the following message appears:

Your credit card has been declined. Click Continue to specify another credit card to complete your purchase. Click Cancel to release the amount on hold and select another payment method.

If the customer decides to reverse the payment and clicks Cancel, the payment is reversed, and a request is sent to Authorize.Net to release the amounts on hold from the previously entered cards. The customer can then select another payment method. If the customer chooses to continue, the Payment Information checkout step reappears, and the customer is prompted to enter another credit card.

Before the order is placed, the customer can click the Cancel button from the Payment Information step to reverse all authorizations and release all amounts.

If the customer changes any order information after having started the partial authorization process, an error will occur when the order is submitted. In such a case, all authorizations are released, and the customer is redirected to the Payment Information checkout step.

Admin Workflow

Partial authorization can be applied to new orders and recorders from the Admin. After you choose the Authorize.Net payment method, enter the card information, and click the Submit Order button, the request is sent to Authorize.Net. If the amount on the card is not enough to cover the order, the available funds are put on hold, and the partial authorization is triggered. A message appears on the Create New Order page, asking if you want to continue. If you choose to continue, the system displays the information about the previously used credit cards, and prompts you to enter another credit card. If you click the Cancel button, all authorizations are reversed.

If you close the browser window during the partial authorization process, the authorizations remain active until they expire. The term of authorization depends on the bank that issued the credit card.

If payment is not complete, you can click the Cancel button in the upper-right corner. Magento then sends a request to Authorize.Net to void the authorization for all cards that were entered during the process, and the amounts on hold are released. If the payment gateway is not able to void authorization for some transactions, the order is canceled by the system only.

Do not change any order information after the partial authorization process begins. Otherwise, an error occur when you submit the order, and all authorizations are released automatically.

Refund Workflow

When processing a refund for an order that was paid with partial authorizations, Magento refunds the correct captured amount to each card. The process is managed by the system, and requires no action on your part.

When initiating an online invoice or refund, and some authorizations fail, the system proceeds with the remaining authorizations, but does not generate the invoice or refund. After all authorizations have been processed, information about the successful authorizations, as well as any that failed, appears in the header of the order. The same information is added to the order comments section of the order. The administrator is then prompted to process the failed authorizations manually, by creating an offline invoice or offline refund in Magento.

For a partial refund, the amounts are refunded to the cards from which they originated, in the order of authorization. The amount captured from the first card is the first to be refunded. In this order, it is possible for the amount reversed on the last card to be less than what was captured during the partial authorization process. In this case the transaction for the card remains open, and can be closed in the next partial refund. Magento stores only the last four digits of the credit card number. For a period of 120 days after the payment, Authorize.Net allows merchant systems to submit a refund using the last four digits of the credit card. After 120 days have passed, you cannot process an online refund for an order that was paid with Authorize.Net.

Because American Express does not support authorization reversals, it is not possible to create an online refund for any purchases paid for with this method. In such a case, you can create an offline refund, and settle the situation by releasing the customer's funds through the appropriate merchant account, outside of the Magento system.

To enable partial authorization:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the upper-left, set **Current Configuration Scope** as needed. To use partial authorization at the global level, accept the "Default Config" setting.
- **3.** In the panel on the left under Sales, select **Payment Methods**. Then, click to expand the **Authorize.Net** section.
- 4. Set Allow Partial Authorization to "Yes."
- **5.** When complete, click the **Save Config** button.

Direct Post

Magento Community Edition incorporates the Direct Post method for payments made through Authorize.Net. When payments are made with 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.

Admin Workflow

Authorize.Net Direct Post can be used with orders created from the Admin as well as from the store. When creating an order, you can select it in the Payment Method section. After selecting the option, the credit card data entry fields appear. If the transaction fails, an error message appears, and you can select another payment method or try again with another card. The order process is similar to the standard order workflow. As with other orders, and invoice, shipment, and credit memo can be created.

Customer Workflow

When Direct Post is enabled, the customer can select it in the Payment Information section of the checkout process. After the customer clicks the corresponding option button and clicks Continue, the Order Review section of the checkout appears, with fields to enter the credit card information. The customer then specifies the card information and clicks the Place Order button. If the transaction is successful, the customer is redirected to the order confirmation page. If the transaction fails on some reason, an error message is displayed in a dialog box and the customer may then select another payment method or try Authorize.Net Direct Post with another card.

ייט	Magento	5					Q Ente	r search	n keyword	G
Fruit	Vegetables	Berries Nuts								
Chec	kout									
Your Checkout		CHECKOUT METHOD								
Progre		BILLING INFORMATION								
riugie	100	SHIPPING INFORMATION								
Bitling Ac	ktress I change	SHIPPING METHOD								
Alex Mar		PAYMENT INFORMATION								
Street City, 123	22	Order Review								
Ukraine						PRI	OK .		SUBT	OTAL
T 12312 F admin		PRODUCT NAME			(EXCL.	()CAT	(NCL TAX)	QTV	(EXCL TAX)	(NCL TA
Shipping	Address chanse	Red Currant			\$1	5.65	\$15.65	1	\$15.65	\$15.65
Alex Mar	ka.							Subt	otsi (Excl. Tax)	\$15.6
Street City, 123	23							Sub	total (Incl. Tax)	\$15.6
Ukraine T: 12312							Shipping Excl	Tax (Fla	d Rate - Fixed)	\$5.0
F. admin							Shipping Incl	Tax (Fla	(Rate - Fixed)	\$5.0
Shipping	Method change							Grand T	otal Excl. Tax	\$20.6
Flat Rate	- Fixed \$5.00						Gra	and To	tal Incl. Tax	\$20.6
Payment	Method change		1000		rd Informat					
	nd Direct Post		Cried	irca	rd intormat	ion				
(Authoria	e,net)	* Credit Card Type	Ptease Select				1			
		* Credit Card Number								
		* Expiration Date	Month	٠	Year					
		* Card Verification Number	What is the?							
		Forgot an Item? Edit Your Carl							PLAC	E ORDER

Checkout Using Authorize.Net Direct Post

To enable and configure the Direct Post Method:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**.
- **3.** Set **Current Configuration Scope** to the website where the configuration is to be applied. To apply the configuration globally, accept the "Default Config" setting.
- 4. Click to expand the Authorize.Net Direct Post section.
- 5. Complete the settings as described in the following field descriptions.
- 6. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION		
Enabled	Website	Activates Authorize Direct Post Method within th Current Configuration Scope setting. Options include: Yes / No.		
Payment Action	Website	Authorize Net pay	rmines how payments are authorized in the orize.Net payment system and the entities are created after the successful transaction. ons include:	
		Authorize Only	Funds on the customer's card are only authorized at the side of the Authorize.Net system and only an order is created in the backend of your store. You can later create an invoice and conduct the capturing.	
		Authorize and Capture	Funds on the customer's card are authorized and captured at Authorize.Net side, and as a result an order and an invoice are created in the backend of your store.	
Title	Store View	A label that identified customers during c	es the payment method to checkout.	
API Login ID	Website	Your Authorize.Ne	t credentials.	
Transaction Key	Website	Your Authorize.Ne	t credentials.	
Merchant MD5	Website		ue enables Magento to verify sponses are securely received t.	
		gateway to encrypt submitted for your Hash Value on the	ue is used by the payment t responses for transactions, account.You can set your MD5 Authorize.Net website at s > Security Settings > MD5-	

Field Descriptions

FIELD	SCOPE	DESCRIP	PTION		
New Order Status	Website	The status assigned to all new orders that are created using this payment method.			
Test Mode	Website	in a test en	s if the Direct Post Method is working vironment, or processing live is. Options include:		
		Yes	Sends a notification to Authorize.Net that orders should be sent to their test site.		
		No	Orders are sent to Authorize.Net as live transactions.		
			g transactions, don't forget to set Test lo," so you can process live ls.		
Gateway URL	Website	The URL to default UR	o which order information is sent. the L is:		
		https://secure.authorize.net/gateway/transact.dll.			
		Authorize and speci field. How	e a special test URL from Net, you can set Test Mode to "No," ify the testing link in the Gateway URL vever, the URL of the live site must be d before going live.		
Accepted Currency	Website	to "US Doll	that the Accepted Currency field is set ar," because this is the only currency ize.Net accepts.		
Debug	Website	Determines if all communication with the payment system is recorded in a log file.			
Email Customer	Website		ether you want Authorize.Net to send our customers on the completion of the		
		This is in addition to the order confirmation email and other transactional email sent from Magento.			

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Merchant's Email	Website	If you want to receive email notifications of orders placed with the Direct Post Method, from Authorize.Net, enter the email address that is associated with your account. If left blank, no email will be sent to you by Authorize.Net.
Credit Card Types	Website	Select the options that will appear in the Credit Card Type list during checkout. Options include:
		American Express
		Visa
		MasterCard
		Discover
		Other
Credit Card Verification	Website	Determines if customers are required to enter the Credit Card Verification number during checkout. Options include: Yes / No.
Payment from Applicable Countries	Website	Determines the countries from which you accept payment. Options include: All Allowed Countries / Specific Countries
Payment from Specific Countries	Website	Determines each country from which you accept payment. Only customers with a billing address in one of the selected countries can use this payment method.
Minimum Order Total	Website	Determines the minimum order total for orders processed with the Direct Post Method. The option appears only for orders that fall within the minimum and maximum range.
Maximum Order Total	Website	Determines the maximum order total for orders processed with the Direct Post Method. The option only for orders that fall within the minimum and maximum range.
Sort Order	Website	Determines the sequence in which the Direct Post Method is listed with other payment methods during checkout.

Field Descriptions (cont.)



CHAPTER 48: Payment Services

Your Magento Community Edition includes support for the following service to provide an additional layer of protection against fraudulent charges and chargebacks for sales.

3D Secure Credit Card Validation

3D Secure Credit Card Validation provides an additional layer of protection against fraudulent charges and chargebacks for sales. The service is available only for eligible payment gateways, and must be enabled in the gateway configuration.

PayPal Fraud Management Filters

Magento Community Edition includes support for PayPal fraud management filters available for Website Payments Pro PayPal accounts, and orders that are paid with either PayPal Express Checkout or Website Payments Pro.

3D Secure Credit Card Validation

Magento Community Edition includes the option to use 3D Secure authentication for payment transactions made with Authorize.Net. Cardinal Centinel® is the company that provides the 3D Secure Credit Card Validation service.

During checkout, the customer is prompted to enter a secret code that is assigned to the card, which is then used to confirm the identity of the cardholder. The bank also provides additional data elements to confirm the cardholder's identity. The service provider arranges the communication between the banks and payment systems. 3D Secure authentication can be used for orders placed from the store, or from the Admin.

Customer Workflow

During the checkout process, the customer selects the Authorize.Net payment method, enters the credit card information, and clicks the Continue button. During Order Review, the bank that issued the credit card displays a form to verify the customer's identity. Depending on the bank's requirements, the customer might be required to enter a secret code, log in to an account, or complete another activity.

After submitting the form, the customer is returned to Order Review. The customer clicks the Place Order button. If the authentication succeeds, the customer proceeds to the order confirmation page. If the authentication fails for any reason, an error message appears and the customer can select another payment method or try again with Authorize.Net.

	CHECKOUT METHOD					
Your Checkout	BILLING INFORMATION					
Progress	SHIPPING INFORMATION					
	SHIPPING METHOD					
Silling Address change	PAYMENT INFORMATION					
Altx Marka Street City, 123123	Order Review					
Ulrane T: 123123 F: admin	Card Verification Please verify the card with the issuer bank:					
Shipping Address I <u>change</u> Alex Marka Street City, 123123 Ulraine	VERIFIED	YourBank				
T: 123123 F: admin	Added Protection Please submit your Verifi	ied by Visa password.				
Shipping Method I chaoze	Merchant	Magento				
Flat Rate - Flood \$5.00		\$20.65USD				
ayment Method change		01/21/2011				
Credit Card		Password is "1234"				
(Authorize.net) Credit Card Visa	User Name					
Type	Password	testi				
Credit Card sooox-0002 Number:		time Unit / Toront root amminute?				

3D Secure Authentication with Verified by VISA

Admin Workflow

When creating an order from the Admin that uses 3D Secure with Authorize.Net, a form appears with the fields to enter the credit card information, and a Start/Reset Validation button. After you complete the credit card information, and click the Start/Reset Validation button, the bank that issued the credit card displays a form to verify the customer's identity. Depending on the bank's requirements, you might be required to enter a secret code, log in to an account, or complete another activity on behalf of the customer. If successful, a message indicates that the transaction has been validated, and you can proceed with the order.

) Credit Can	d Direct Post (Authorize.net)
PayPal Dir	ect Payment Payflow Edition (PBridge)
PayPal Bill	ling Agreement
Check/Mo	uney order
Credit Car	d (Authorize.net)
Credt Car	rd Type *
Visa	
Credit Car	rd Number*
4000000	00000002
Expiration	Date *
01 - Janu	uary 💌 2011 💌
Credit Car	d (speed)

3D Secure Authentication from the Admin



Step 1: Complete the 3D Secure Configuration

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select Payment Services.
- **3.** To apply the configuration at the website level, set **Current Configuration Scope** in the upper-left corner, as needed. To apply the configuration at the global level, accept the "Default Config" setting.
- 4. Click to expand the **3D Secure Credit Card Validation** section. Then, do the following:

D Secure Credit Card Vali	idation	
Processor ID	[WEBSITE]	
Merchant ID	[WEBSITE]	
Password	[WEBSITE]	
Test Mode	No (WEBSITE) A Overrides API URL that may be specified by a payment method.	
Debug Mode	No (WEBSITE)	

3D Secure Credit Card Validation

- **a.** Enter the following credentials that are required to connect to the Cardinal Centinel system:
 - Processor ID
 - Merchant ID
 - Password
- b. To test 3D Secure Validation before going live in the store, set **Test Mode** to "Yes."
- **c.** To save a log file of all interactions between your server and the Cardinal Centinel system, set **Debug Mode** to "Yes."
- 5. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Processor ID	Website	The merchant processor identification code assigned to you by Cardinal Centinel.
Merchant ID	Website	The merchant identification code assigned to you by Cardinal Centinel.
Password	Website	The password required to connect to the Cardinal Centinel system.
Test Mode	Website	Determines if you are running 3D Secure in a test environment or in production mode. Options include: Yes / No
Debug Mode	Website	Determines if all interactions between your server and the Cardinal Centinel system are saved in a log file. Options include: Yes / No.

Field Descriptions

Step 2: Enable 3D Secure for Authorize.Net

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Payment Methods**.

- **3.** To apply the configuration at the website level, set **Current Configuration Scope** in the upper-left corner as needed. To apply the configuration at the global level, accept the "Default Config" setting.
- **4.** Click to expand the **Authorize.Net** section. Then, scroll down to the 3D Secure section. Then, do the following:

Enable 3D Secure Card	Yes 🔻	[WEBSITE]
Validation on Frontend		
Severe 3D Secure Card	No	[WEBSITE]
Validation	A Severe Validation Removes Chargeback Liability on	
	Merchant	
Centinel API URL		[WEBSITE]
	▲ If empty, a default value will be used. Custom URL may	
	be provided by CardinalCommerce agreement.	

Enable 3D Secure Card for Authorize.Net

a. Set Enable 3D Secure Card Validation on Frontend to "Yes."

If you are use Magento Secure Payment Bridge, you can ignore the additional settings.

- **b.** In the **Severe 3D Secure Card Validation** field, specify if you want severe validation to be applied to credit card purchases made through the Centinel system. Severe validation removes merchant liability for any chargebacks that may occur.
- **c.** In the **Centinel API URL** field, enter the URL that was provided by Cardinal Centinel to establish the connection with their system.
- 5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable 3D Secure Card Validation on Frontend	Website	Activates 3D Secure for use with Authorize.Net. Options Include: Yes / No.
Severe 3D Secure Card Validation	Website	Removes chargeback liability from the merchant. Options include: Yes / No.
Centinel API URL	Website	The URL provided in your 3D Secure agreement.

Notes	



Shipping

In this section...

Basic Shipping Methods

Shipping Carriers

Shipping Labels



CHAPTER 49: Basic Shipping Methods

Magento Community Edition supports a wide range of shipping methods and carriers. This section shows how to configure the following basic shipping methods.

Topics in this chapter:

- Shipping Settings
- Flat Rate
- Free Shipping
- Table Rates
- Online Rates
- Dimensional Weight

Before you proceed, make sure that you have completed the Shipping Settings to establish the point of origin for your store, and your preference for handling orders shipped to multiple addresses.

Shipping Settings

The Shipping Settings establish the point of origin for all shipments made from your store or warehouse, and determine if you support shipments to multiple addresses. The point of origin also determines the store tax rate for products sold.

Origin			٥
Country	United States	۲	[WEBSITE]
Region/State	California	۲	[WEBSITE]
ZIP/Postal Code	90232		[WEBSITE]
City	Culver City		[WEBSITE]
Street Address	10441 Jefferson Blvd, Suite 200		[WEBSITE]
Street Address Line 2			[WEBSITE]

Origin

To establish the point of origin:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, click **Shipping Settings**.
- 3. Click to 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, click the **Save Config** button.

To support shipments to multiple addresses:

- 1. Click to expand the **Options** section, and complete the following:
- 2. Set Allow Shipping to Multiple Addresses to "Yes."
- **3.** To limit the number of address you accept per shipment, enter the number in the **Maximum Qty Allowed for Shipping to Multiple Addresses** field.

Options		•
Allow Shipping to Multiple Addresses	Yes 🔻	(WEBSITE)
Maximum Qty Allowed for Shipping to Multiple Addresses	100	[WEBSITE]

Options

4. When complete, click the **Save Config** button.

Flat Rate

Flat rate is a fixed, predefined charge that can be applied per item, or per shipment. Flat rate is a simple solution, especially when used with the flat-rate packaging that is available from some carriers.

at Rate		
Enabled	[No •	(weepue)
Title	Flat Rate	Intoke vewl
Method Name	Fixed	ISTORE VEWI
Гуре	Per Item •	(WEBS/TE)
Price	5.00	(weene)
Calculate Handling Fee	Fired	[WEBSITE]
landling Fee		[WEBSITE]
Displayed Error Message	This shupping method is currently unavailable. If you would like to a hip using this shipping method, please contact us.	, ISTORE VEW)
Ship to Applicable Countries	All Allowed Countries	[WEBSITE]
Ship to Specific Countries	Alghanistan Alandi talandi Alania Appria Ansekan Anterna Angota Angota Angota Angota Angota Antactica Antactica and Barbota	[WEDSITE]
Sort Order		IWEBSITEI

Flat Rate

To set up flat rate shipping:

- 1. On the Admin menu, select **System > Configuration**. In the panel on the left, under Sales, select **Shipping Methods**.
- 2. Click to 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 this shipping method. The default is "Flat Rate."
- **c.** Enter a **Method Name** that appears 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** to be charged for the flat rate fee.
- 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. 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 this method 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 this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

- i. Enter a **Sort Order** number to determine the position of Flat Rate in the list of shipping methods during checkout. (0 = first, 1 = second, 2 = third, and so on.)
- **3.** When complete, click the **Save Config** button.

Free Shipping

Free shipping is one of the most effective promotions you can offer. It can be based on a minimum purchase, or set up as a shopping cart <u>price rule</u> that applies when a set of conditions is met. If both apply to the same order, the configuration setting will take precedence over the shopping cart rule.

Check your shipping carrier configuration for any additional settings that may be required for free shipping.

Enabled	No	(WEBSITE)
Title	Free Shipping	ISTORE VIEW]
liethod Name	Free	[STORE VEW]
Minimum Order Amount	2000	(WEBSITE)
Displayed Error Message	This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.	ISTORE VIEW
Ship to Applicable Countries	All Allowed Countries	(WEBSITE)
Ship to Applicable Countries Ship to Specific Countries	All Allowed Countries	lwresuel Iwescuel

Free Shipping

To set up free shipping:

- 1. On the Admin menu, select **System > Configuration**. In the panel on the left, under Sales, select **Shipping Methods**.
- 2. Click to expand the Free Shipping section. Then, do the following:
 - a. Set Enabled to "Yes."
 - **b.** Enter a **Title** for this shipping method that will be displayed during checkout.
 - c. Enter a descriptive **Method Name** to identify this shipping method.
 - d. Enter the Minimum Order Amount to qualify for free shipping.

To use Free Shipping with Table Rates, you must enter a Minimum Order Amount so high that it is never met. This prevents Free Shipping from going into effect, unless triggered by a price rule.

- **e.** In the **Displayed Error Message** box, type the message to appear if this method 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 this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears.Select each country in the list where this shipping method can be used.

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.)
- **3.** When complete, click the **Save Config** button.
- **4.** Make sure that you complete any configuration that is required for each carrier you plan to use with free shipping. For example, assuming that your UPS configuration is otherwise complete, make the following settings to enable and configure free shipping:
 - **a.** From the Shipping Methods configuration, click to expand the **UPS** section.
 - b. In the UPS section, set Free Method to "Ground."
 - **c.** To require a minimum order for free shipping, set **Free Shipping with Minimum Order Amount** to "Enable."
 - d. Enter the required amount in the Minimum Order Amount for Free Shipping field.
- 5. When complete, click the **Save Config** button.

Table Rates

The table rate shipping method lets you set up a table to calculate shipping rates for a combination of conditions. The shipping rate can be based on the following:

- Weight v. Destination
- Price v. Destination
- # of Items v. Destination

If your warehouse is located 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 customer.

Example: 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	НІ	*	0	20
USA	НІ	*	50	15
USA	HI	*	100	10

Example 2: Restrict Free Shipping to the Continental United States

You can use table rates to limit free shipping to only the continental United States, while excluding Alaska and Hawaii.

- **1.** Create a tablerates.csv file that includes all the state destinations to which you are willing to provide free shipping.
- 2. Complete the table rate configuration with the following settings:

SETTING	VALUE
Condition	Price v. Destination
Method Name	Free Shipping
Ship to Applicable Countries	Specific Countries
Ship to Specific Countries	Select only United States

Show method if not applicable No

3. Set **Current Configuration Scope** to the main website. Then, click the **Import** button to import the tablesrates.csv file.

		ESTIMATE
	UNITED PARCEL SERVICE Drivent \$14.47 3 Day Select \$15.19 Next Day Alt \$32.71 HET WAY	
Table Rate	≥ • Table Rate \$5.00	ATE TOTAL
	SUBTOTAL	\$750.00
	SHIPPING & HANDLING (BEST WAY - TABLE RATE)	\$5.00
	TAX	\$67.50
	GRAND TOTAL	\$822.50
	Check of P	
	-0	
	PHOCEED TO	CHECKOUT
	Distant while	ittple Addresses

Table Rate in Shopping Cart

Setting Up Table Rates

The data that is used to calculate the rate 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.

Process Overview:

Step 1: Complete the Default Settings

Step 2: Prepare the Table Rate Data

Step 3: Import the Table Rate Data

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 menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, select **Shipping Methods**.
- 3. Click to expand the **Table Rates** section. Then, do the following:
 - a. Set Enabled to "Yes."
 - **b.** Enter a **Title** for the section of table rates that appears during checkout. (The default title is "Best Way.")
 - c. Enter the **Method Name** that appears 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, click the **Save Config** button.

ble Rates				
Enabled	Yes	•	MEBGITE	
itte	Best Way	1	STORE VEW)	
lethod Name	Table Rate		STORE VEW)	
condition	Weight vs. Destination	•	WEBSITE	
nclude Virtual Products in Price Calculation	Yes	•] 1	ME8SITE]	
alculate Handling Fee	Fixed	• 1	weesneg	
landling Fee			NEBSITE)	
Displayed Error Message	This shipping method is currently un you would like to ship using this ship please contact us.		TORE VEW)	
Ship to Applicable Countries	All Allowed Countries		veennet	
	All Allowed Countries Alghanestan Albania Albania Antenica Stamos Andorna Angota Angota Angota Angota Angota Antenica Antenica	•	WEBSITE)	
Ship to Applicable Countries Ship to Specific Countries Show Method if Not Applicable	Alphaneston Altand Istando Altand Istando Altand Istando Altandora Anterican Sarthos Andora Angota Angota Angota Antarchica	•		

Table Rates

Step 2: Prepare the Table Rate Data

1. In the upper-left corner, set **Current Configuration Scope** to the "Main Website," or any other website where you want the configuration to apply.

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. If you want to change the **Condition**, clear the **Use Default** checkbox. Then, select another option.
- 3. Click the **Export CSV** button. Then, save the **tablerates.csv** file to your computer.

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Current Configuration Scope	Shipping Methods			@ Tank Config
Main Website •	9			
Riscau Dures	Flat Rate			<u> </u>
Configuration	Table Bates			0
+ GENERAL	Enabled	794	•	W Use Default (intribut)
General	Title	Beil II a		Club Default (2010) VEHI
Web	Nethed Name	Table Rate		W Use Default (STUDE VEW)
Design	Condition	maght is Destination		W Use Detaut (H1907)
Currenty Selup				
Dore Email Addresses	Epot	Expert CDV		longenet!
Contacts	Include Virtuel Products in Price	111	•	Con Default (MERCIPE)
Content Management	Calculation	De		(MENTE)
CATALOG	Catulate Handing Fee	Export CS	v .	@ Use Default (H19070)
Catalog				
inventory	Handing Fee			& One Default (VERDITE)
Google Sitemap	Displayed Error Nessage	This shapping nethod is current you would like to phip using the		We Default (ITTRE VEW)
RSSFeeds		plagie confact us.	page of the second	
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 CUSTOMENS 				
Newsieter				
Customer Configuration				
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Persistent Shopping Cart	This to Applicable Countries	All Allowed Countries	•	W Use Default (Hits/III)
+ SALIS	Bhig to Specific Countries			H Use Default (MINUTE)
Same		Parallel Internet (IN)		
Dates Emails				
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Theoring Settings			-	
Shipping Hethods	Show Nethod #1kd Applicable	194	٠	2 Use Detault (H10177)
Google API	Bort Order			W Use Default (HTROTT)
Parment tilebods				

Export CSV

- 4. Open the file in Excel, or any other spreadsheet program.
- **5.** Complete the table with appropriate values for the shipping calculation condition being used.
 - You can 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	В	С	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						•
N 4	Sheet1 Sheet2	Sheet3 /	1			<u> </u>

Weight vs. Destination

6. 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 **Current Configuration Scope** to the website where this method will be used.

Next to the Import field, click the Choose File button. Select your completed tablerates.csv file, and import the rates.

able Rates		
Enabled	Yes	Use Default (WEBSITE)
Title	BestWay	Use Detault (STORE VEW)
Method Name	Table	Use Default (STORE VEW)
Condition	Weig Import	Use Default_(WEBSITE)
Export	Expe	(WEBGITE)
Include Virtual Products in Price Calculation	Ves	Use Default (WEDSITE)
Import	Choose File tablerates.csv	IWEBSITEJ
Calculate Handling Fee	Fixed	 Use Default (WEBSITE)
Handling Fee		Use Default (WEBSITE)
Displayed Error Message	This shipping method is currently unava you would like to ship using this shippin please contact us.	

Import Table Rates

4. When complete, click the **Save Config** button. Then, go through the payment process with different addresses to make sure the shipping and handling rates are correct.

Online Rates

Magento offers dynamic retrieval of rates from various shipping providers. To enable and configure online rates, see the carrier configuration for the following carriers:

- UPS
- USPS
- FedEx
- DHL

Setting up online rates is similar to setting up Flat Rates. Because the online rate options differ for each service, contact the carrier for more information.

Most shipping providers require that you open an account with them. Consult your shipping provider for details on how to obtain API credentials.

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. However, WebShopApps has developed a Dimensional Shipping extension that manages rates for FedEx, UPS, and USPS. WebShopApps is a Magento Technology Partner.



CHAPTER 50: Shipping 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 installation.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

USPS

The United States Postal Service is the independent postal service of United States government. USPS offers domestic and international shipping services by land and air.

FedEx

Offers domestic and international shipping services by land and air to more than 220 countries.

DHL

Offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

UPS

United Parcel Service offers domestic and international shipping services by land and air to more than 220 countries.

UPS now uses dimensional weight to determine some shipping rates.

Process Overview: Step 1: Open a UPS Shipping Account Step 2: Enable UPS for Your Store Step 3: Complete the Container Description Step 4: Set Up Handling Fees Step 5: Specify Allowed Methods and Applicable Countries

Step 1: Open a UPS Shipping Account

To offer this shipping method to your customers, you must first open an account with UPS.

Step 2: Enable UPS for Your Store

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Sales, select **Shipping Methods**. Then, click to expand the **UPS** section.
- 3. Set Enabled for Checkout to "Yes."
- 4. For a standard UPS account, set UPS Type to "United Parcel Service." Then in the Gateway URL field, enter the URL that is used to calculate UPS shipping rates. This field is preset by default, and normally does not need to be changed.

To generate shipping labels, UPS Type must be set to "United Parcel XML."

- 5. For a UPS XML account, do the following:
 - a. Set UPS Type to "United Parcel Service XML."
 - **b.** Enter the following UPS credentials:
 - User ID
 - Access License Number
 - Password

- **c.** Set **Mode** to "Live" to send data to the UPS shipping system over a secure connection. (Development mode does not send data over a secure connection.)
- d. Verify the Gateway XML URL that is required to send requests by XML file.
- e. Set **Order of Shipment** to the region where the shipment originates.
- f. If you have special rates with UPS, set **Enable Negotiated Rates** to "Yes." Then, enter the six-digit **Shipper Number** assigned to you by UPS.

Step 3: Complete the Container Description

- **1.** In the **Title** field, type the name of this shipping option that appears during checkout. By default, this field is set to "United Parcel Service."
- 2. Set **Packages Request Type** to one of the following:
 - Use origin weight (few requests)
 - Divide to equal weight (one request)
- 3. In the **Container** field, specify the typical packaging type that is used for shipment.
- 4. Set **Destination Type** to one of the following:

Residential	Most of your shipments are business to consumer (B2C).
Commercial	Most of your shipments are business to business (B2B).
Define Automatically	UPS determines the destination type as either residential or commercial, and uses the appropriate rate from the merchant's UPS account during checkout.

- **5.** Set **Weight Unit** to the system you use to measure product weight. The weight system supported by UPS varies by country. If in doubt, ask UPS which weight system you should use. Options include:
 - LBS
 - KGS
- 6. Set **Pickup Method** to one of the following:
 - Regular Daily Pickup
 - On Call Air
 - One Time Pickup
 - Letter Center
 - Customer Counter
- 7. Enter the **Maximum Package Weight** allowed by the carrier.

8. Enter the Minimum Package Weight allowed by the carrier.

Step 4: Set Up Handling Fees

- 1. Set **Calculate Handling Fee** to one of the following methods:
 - Fixed
 - Percent
- **2.** To determine how the handling fee is applied, set **Handling Applied** to one of the following:
 - Per Order
 - Per Package
- **3.** Enter the amount of the **Handling Fee** to be charged. To enter a percentage, use the decimal format. For example, enter 0.25 for 25%.

Step 5: Specify Allowed Methods and Applicable Countries

- 1. In the **Allowed Methods** list, select each UPS method offered to your customers. The methods appear under UPS during checkout. (Hold the Ctrl key down to select multiple options).
- **2.** Set **Free Method** to the UPS service you want to use for offers of free shipping. Then, do one of the following:
 - Set Free Shipping with Minimum Order Amount to "Enable." Then, enter the Minimum Order Amount for Free Shipping.
 - Set Free Shipping with Minimum Order Amount to "Disable."
- **3.** In the **Displayed Error Message box**, type the message customers see if UPS shipping becomes unavailable.
- 4. Set Ship to Applicable Countries to one of the following:

All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

- **5.** To create a log file with the details of UPS shipments made from your store, set **Debug** to "Yes."
- 6. Set Show Method if Not Applicable to one of the following:

- Yes To list all UPS shipping methods to customers, regardless of their availability.
- No To list only the methods which are available to customers.
- **7.** In the **Sort Order** field, type a numeric value to determine the order in which UPS appears when listed with other shipping methods during checkout. The number with the highest priority is 0, which puts it at the top of the list.
- 8. When complete, click the **Save Config** button.

	These	719200
Enabled for Checkout	Yes 🔹	[weinstrat]
UPS Type	United Parcel Service •	[weitering]
Title	United Parcel Service	Itszel with
Gateway URL	http://www.ups.com/using/services/tave/gcostogi.cc	INERGIA
Fackages Request Type	Divide to equal weight (one request)	pressure
Container	Customer Packaging	(MEBINTE)
Destination Type	Residential	[WEBGITE]
Weight Unit	L85 ·	[WEBSITE]
Pickup Method	Customer Counter +	(MEBSITE)
Maximum Package Weight (Please consult your shipping carrier for maximum supported shipping weight)	150	[weess/re]
Minimum Package Weight (Please consult your shipping carrier for minimum supported shipping weight)	0.1	[MERICAL
Calculate Handling Fee	Fixed	permanan
Handling Applied	Per Order ·	[MEDIATE]
Handling Fee		DVEBSITE)
Allowed Methods	Next Day Ar Early AM + Next Day Ar Early AM Letter Next Day Ar Letter Next Day Ar Letter Next Day Ar Letter Next Day Ar Intra (Puerto Ricco)	[oversearch]
	Next Day Air Saver Next Day Air Saver Letter 2nd Day Air AM 2nd Day Air AM Letter 2nd Day Air	
Free Method	Ground	[WEBLITE]
Free Shipping with Minimum Order Amount	Disable •	[WEDDITE]
Minimum Order Amount for Free Shipping		SWERDLIE]
Displayed Error Message	This shaping method is currently utavailable. If you would be to sho using this shipping method, prease contact us.	ISTORE NEWS
Ship to Applicable Countries	Specific Countries •	(MEDSITE)
Ship to Specific Countries	Alghanistan Aland Islands	(WEBSITE)
	Albania	
	Algeria	
	American Samoa	
	Andorra Angola	
	Anguita	
	Antarctica	
	Antigue and Barbude -	
Debug	No •	[WEBSITE]
Debug Show Method if Not Applicable	No •	(WEBSTE)

UPS Configuration

FIELD	SCOPE	DESCRIPTION		
Enabled for Checkout	Website	Enables/disables UPS as a shipping method available to customers during checkout. Options include: Yes / No.		
UPS Type	Website		nod used to connect to the UPS The available options are:	
		United Parcel Service	Your store sends key- value pairs to UPS as a request.	
		United Parcel Service XML	Your store sends an XML file with data to UPS as a request.	
Title	Store View	The title of this shipping option as it appears in th shopping cart checkout.		
Gateway URL	Website	United Parcel Service	The URL used to connect to the UPS system and retrieve shipping rates dynamically.	
		United Parcel Service XML	For UPS XML service, displays the following URLs that are required to transmit XML data:	
			Gateway XML URL	
			Tracking XML URL	
			Shipping Confirm XML URL	
			Shipping Accept XML URL	
UserID	Website	(For UPS XML service.) Your UPS shipper account user ID.		
Access License Number	Website	(For UPS XML service.) Your UPS shipper account access license number.		
Origin of the Shipment	Website	(For UPS XML service.) The country or region where the product shipment originates.		

Field Descriptions

FIELD	SCOPE	DESCRIPTION	
Mode	Website	•	vice.) Sets the mode of ata sent to the UPS system.
		Live	Data is insecurely sent to UPS.
		Development	Data is securely sent to UPS.
Password	Website	(For UPS XML ser account password	vice.) Your UPS shipper
Enable Negotiated Rates	Website	•	vice.) Enables / disables ording to your agreement with ude: Yes / No.
Packages Request Type	Website	Options include: Divide to equal weight (one request) Use origin weight (few requests)	
Shipper Number	Website	(For UPS XML service.) The Shipper number is required for reference if using negotiated rates.	
Container	Website	Sets the container shipments. Option Customer Packagi UPS Letter Envelo Customer Packagi UPS Letter Envelo UPS Tube UPS Tube UPS Express Box UPS Worldwide 25	ing ipe ing ipe 5 kilo
Destination Type	Website		ipment destination type. usiness / Residential
Weight Unit	Website		it of measurement for product e. See also: Dimensional
Pickup Method	Website	Sets the UPS pick Regular Daily Pick	up method. Options include:

FIELD	SCOPE	DESCRIPTION	
		On Call Air	
		One Time Pickup	
		Letter Center	
		Customer Counter	
Maximum Package Weight	Website	as specified by UP	weight that a package can be S. If the products ordered num package weight, this ot available.
		•	com, packages cannot exceed eck with your shipping carrier to n weight.
Minimum Package Weight	Website	Sets the minimum weight that a package can be as specified by UPS. If the products ordered weigh less than the minimum package weight, this shipping option will not be available. Check with your shipping carrier to verify the minimum weight.	
Calculate Handling Fee	Website	Sets the handling ferrate shipping.	ee calculation method for table
		Fixed	Handling fee is a fixed rate.
		Percent	Handling fee is applied as a percentage of the order amount.
Handling Applied	Website	Specifies whether handling fee is applied to each order or to each package within an order.	
Handling Fee	Website	Ũ	nat is included with the Handling fee can be set as a ercentage.
		If typing a percenta format 0.25 for 259	age amount, use the decimal %.

FIELD	SCOPE	DESCRIPTION	
Allowed Methods	Website	that are offered to cu	d methods of UPS shipping stomers. Shipping rates will on the selected shipping
Free Method	Website	Sets the free shippin can be disabled by s	g method through UPS, or electing None.
		Free Shipping meth	od is similar to the regular od, however it will be listed ping options and is identified
Free Shipping with Minimum Order Amount	Website	Enables or disables conditional free shipping that depends on meeting a minimum order amount.	
Minimum Order Amount for Free Shipping	Website	Sets the minimum total order amount that must be met to qualify an order for free shipping.	
Displayed Error Message	Store View	The error message that is displayed when this shipping method is unavailable for any reason.	
Ship to Applicable Countries	Website	Specifies which country customers are allowed use this shipping method.	
		All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
		Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.
Debug	Website	•	smissions between your ogged in the system for
		Unless there is an is and logged, this show	sue that needs to be tracked uld be set to "No."

FIELD	SCOPE	DESCR	IPTION		
Show Method if Not	Website	Options i	Options include:		
Applicable		Yes	UPS always appears as a shipping option during checkout, even if not applicable to the order.		
		No	UPS appears as a shipping option during checkout only if applicable to the order. (For example, if the order weight exceeds the maximum weight amount.)		
Sort Order	Website	Sets the sort order value for this shipping method This value, relative to other shipping methods, determines the displayed order of shipping option in checkout.			
			methods are displayed in ascending sed on sort order value. Enter 0 for the top t.		

UPS

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 Container Description

Step 4: Specify Allowed Methods and Applicable Countries

Step 1: Open a USPS Shipping Account

- **1.** Open a USPS Web Tools account. After you complete the registration process, you will receive your User ID and a URL to the USPS test server.
- 2. You can also open a USPS Web Tools account. After you complete the registration process, you will receive your User ID and a URL to the USPS test server. To learn more about USPS Web Tools, see their Technical Documentation.

Step 2: Enable USPS for Your Store

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, click **Shipping Methods**.
- 3. Click to expand the **USPS** section. Then, do the following:
 - a. Set Enabled for Checkout to "Yes."
 - **b.** The **Gateway URL** is needed to access USPS shipping rates. The field is preset by default, and normally does not need to be changed.
 - c. Enter a Title for this shipping method that will appear during checkout.
 - d. Enter the **User ID** for your USPS account.

Step 3: Complete the Container Description

- **1.** Set **Container** to the type of packaging usually used to ship products ordered for your store. Options include:
 - Variable
 - Flat-Rate Box
 - Flat-Rate Envelope

- Rectangular
- Non-Rectangular
- 2. Set the **Size** of the typical package shipped from your store. Options include:
 - Regular
 - Large
 - Oversize
- **3.** Set **Machinable** to one of the following:
 - Yes If your typical package can be processed by a machine.
 - No If your typical package must be processed manually.

Step 4: Specify Allowed Methods and Applicable Countries

- 1. In the **Allowed Methods** list, select each USPS offered to your customers. The methods will appear under USPS during checkout. (Hold the Ctrl key down to select multiple options). Then, do the following:
 - **a.** Set the **Free Method** list to the method you want to use for free shipping. You may also select **None.**
 - **b.** Set the **Free Shipping with Minimum Order Amount** to one of the following:

Enable	Provides free shipping for orders that meet the minimum monetary amount specified. Then in the field below, enter the Minimum Order Amount for Free Shipping.
Disable	Does not provide free shipping based on minimum order amount.

- 2. The **Displayed Error Message** text box is preset with a default message. You can either leave this message or you can type the message you want your customers to see if USPS shipping becomes unavailable.
- 3. Set Ship to Applicable Countries to one of the following:

All Allowed	Customers from all countries specified in your store configuration
Countries	can use this shipping method.
Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.

4. Set Show Method if Not Applicable to one of the following:

- Yes Lists all available USPS shipping methods during checkout, including those that don't apply to the shipment.
- No Lists only the USPS shipping methods that are applicable to the shipment.
- **5.** Set **Debug** to "Yes" to create a log file with the details of all USPS activity related to your store.
- 6. In the **Sort Order** field, enter a numeric value to determine the order in which USPS shipping method appears in the list with other shipping methods during checkout. The highest value is zero, which puts it at the top of the list.
- 7. When complete, click the **Save Config** button.

abled for Checkout teway URL cute Gateway URL e	Yes • http:/production.shippingapis.com/ShippingAPI.dl	
cure Gateway URL		I [MERDITE]
	https://secure.shippingapis.com/ShippingAPLdll	[webbrief]
,	United States Postal Service	ISTORE VIEW
er ID		[MILLING]
toword		(WERGITE)
de	Development •	
ckages Request Type	Divide to equal weight (one request)	
otainer	Variable •	[WEDSITE]
	Regular	(WEBSITE)
chinable	Yes	[WEBSITE]
ximum Package Weight	70	[WEBS/TE]
ease consult your shipping tier for maximum supported oping weight)		
iculate Handling Fee	Fixed	. [wentering]
ndling Applied	Per Order •	[[Menoral
ndling Fee		pweinstreig
swed Methods	First-Class Mail Large Envelope - First-Class Mail Letter	[[MEBSITE]
	Fest Class Mail Parcel Frast Class Mail Portcards Priority Mail Priority Mail Express Hold Fer Pickup Priority Mail Express Standard Post Media Mail Litrary Mail	
e Method		(WEBSITE)
e Metrica vimum: Order Amount for Free aping	None •	[MEDUTE]
played Error Message	This shipping method is currently unavailable. If you would like to sho using this shipping method, please contact us.	JSTORE VEXA
p to Applicable Countries	Specific Countries	[WEBGITE]
p to Specific Countries	Atghanistan	DATE DATE:
	Aland Islands	
	Abania	
	Algeria	
	American Samoa Andorra	
	Angola	
	Anguilla	
	Antarctica	
	Antigue and Barbuda	
60g	No	[WEBSITE]
	No	
ow Method If Not Applicable	N0.	(WEBSTE)

USPS Configuration

Field Descriptions	SCOPE	DESCRIPTION	l
Enabled for Checkout	Website	Enables/disables	s the USPS shipping method.
Gateway URL	Website	The URL used to connect to the USPS system and retrieve shipping rates dynamically.	
Title	Store View	The title of this shipping option as it appears in the shopping cart checkout.	
User	Website	USPS shipper ad	ccount user ID.
Container	Website	Sets the container type used to package order shipments. Options include: Variable Flat Rate Box Flat Rate Envelope Rectangular Non-rectangular	
Size	Website	Sets the Size option to the typical shipment package size. This option affects the calculation of the shipping rate. Options include: Regular Large Oversize	
Machinable	Website	Specifies whether the package can be processed by machine. This option affects the calculation of the shipping rate.	
Maximum Package Weight	Website	Sets the maximum weight that a package can be as specified by USPS. If the products ordered exceeds the maximum package weight, this shipping option will not be available.	
Calculate Handling Fee Website Sets the handling f rate shipping.		g fee calculation method for table	
		Fixed	Handling fee is a fixed rate.
		Percent	Handling fee is applied as a percentage of the order

Field Descriptions

amount.

FIELD	SCOPE	DESCRIPTION
Handling Applied	Website	Specifies whether handling fee is applied to each order or to each package within an order.
Handling Fee	Website	Sets the handling that is included with the shipping rate price. Handling fee can be set as a fixed amount or a percentage.
		When typing a percentage amount, use the decimal format 0.25 for 25%.
Allowed Methods	Website	Specifies the allowed methods of USPS shipping that is offered to customers. Shipping rates are calculated based on the selected shipping method.
Free Method	Website	Sets the free shipping method through USPS, or can be disabled by selecting "None."
		This shipping method is similar to your store's Free Shipping method, however it is listed as a USPS shipping option, and identified as USPS shipping.
Free Shipping with Minimum Order Amount	Website	Enables or disables conditional free shipping that depends on meeting a minimum order amount.
Minimum Order Amount for Free Shipping	Website	Sets the minimum total order amount that must be met to qualify an order for free shipping.
Displayed Error Message	Store View	The error message that appears when USPS is unavailable for any reason.
Ship to Applicable Countries	Website	Specifies the countries where orders can be shipped.

FIELD	SCOPE	DESCRIPTION	
		All Allowed Countries	Customers from all countries specified in your store configuration can use this shipping method.
		Specific Countries	After choosing this option, the Ship to Specific Countries list appears. Select each country in the list where this shipping method can be used.
Show Method if Not Applicable	Website	Controls the display of USPS shipping during checkout. Options include:	
		Yes	USPS always appears as a shipping option during checkout, even if not applicable to the order.
		No	USPS does appears as a shipping option during checkout only if applicable to the order. (i.e. Order weight exceeds the maximum weight amount).
Debug	Website		nsmissions between your be logged in the system for
		Unless there is an is and logged, this sho	sue that needs to be tracked uld be set to "No."
Sort Order	Website	This value, relative t	alue for this shipping method. o other shipping methods, ayed order of shipping options
			ppear in ascending order, value. Enter 0 for the top of

FedEx

FedEx is one of the world's largest shipping service companies, providing air, freight, and ground shipping services with several levels of priorities.

FedEx now uses dimensional weight to determine some shipping rates.

Process Overview:

Step 1: Register for FedEx Web Services Production

Step 2: Enable FedEx for Your Store

Step 3: Package Description and Handling Fee

Step 4: Allowed Methods and Applicable Countries

Step 1: Register for FedEx Web Services Production

You must create a FedEx merchant account and register for FedEx Web Services Production Access. After creating a FedEx account, read through the production account information page, then click the Obtain Production Key link at the bottom of the page to register and obtain a key.

Make sure to copy or write down the authentication key. You will need it to set up FedEx in your Magento shipping settings.

Step 2: Enable FedEx for Your Store

- 1. On the Admin menu, select **System > Configurations**. Then in the panel on the left, under Sales, select **Shipping Methods**.
- 2. Click to expand the **FedEx** section, and do the following:
 - a. To activate the FedEx shipping method, set Enabled for Checkout to "Yes."
 - **b.** Enter an appropriate **Title** to identify this shipping method during checkout.
 - **c.** Enter the following information from your FedEx account:
 - Account ID
 - Meter Number
 - Key
 - Password
 - **d.** If you have set up a FedEx sandbox and want to work in the testing environment, set **Sandbox Mode** to "Yes."

Remember to set Sandbox Mode to "No" when you are ready to offer FedEx as a shipping method to your customers.

Step 3: Package Description and Handle Fee

- **1.** Select the **Packages Request Type** to the option that best describes your preference when splitting an order into multiple shipments:
 - Divide to equal weight (one request)
 - Use origin weight (few requests)
- **2.** Select the type of **Packaging** typically used to ship products from your store. Options include:
 - FedEx Envelope
 - FedEx Pak
 - FedEx Box
 - FedEx Tube
 - FedEx 10kg Box
 - FedEx 25kg Box
 - Your Packaging
- **3.** Set **Dropoff** to the pick-up method that will be used for delivery. Options include:

Regular Pickup	If you have a high volume of shipments, it can be cost effective to make arrangements with FedEx for regular pickups.
Request Courier	You must call and request a FedEx courier to pick-up shipments.
Drop Box	You must drop off shipments at your nearby FedEx drop box.
Business Service Center	You must drop off shipments at your local FedEx business service center.
Station	You must drop off shipments at your local FedEx station.

- 4. Set Weight Unit to the unit of measurement that is used in your locale. Options include:
 - Pounds
 - Kilograms

- **5.** Enter the **Maximum Package Weight** allowed for FedEx shipments. The default FedEx maximum weight is 150 lbs. Please consult your shipping carrier for more information. We recommend using the default value, unless you have made special arrangements with FedEx. See also: Dimensional Weight.
- **6.** An optional handling fee can be added to the amount charged by FedEx, which is not visible during checkout. If you want to charge a handling fee, do the following:
 - a. Set Calculate Handling Fee to one of the following:
 - Fixed Fee
 - Percentage
 - **b.** In the **Handling Applied** list, choose one of the following methods for managing handling fees:
 - Per Order
 - Per Package
 - **c.** Enter the **Handling Fee** as either a fixed amount or percentage, depending on the method of calculation.
- **7.** Set **Residential Delivery** to one of the following, depending on whether you sell Business-to-Consumer (B2C) or Business-to-Business (B2B).
 - Yes For B2C residential deliveries.
 - No For B2B residential deliveries.

Step 4: Allowed Methods and Applicable Countries

1. Set **Allowed Methods** to each method of shipment that you want to offer. When choosing methods, take into consideration your FedEx account, the frequency and size of your shipments, and if you allow international shipments. You can offer as many or as few methods as you want. Options include:

Europe First Priority	Ground	International Priority
1 Day Freight	First Overnight	Intl Priority Freight
2 Day Freight	Home Delivery	Priority Overnight
2 Day	International Economy	Smart Post*
2 Day AM	Intl Economy Freight	Standard Overnight
3 Day Freight	International First	Freight
Express Saver	International Ground	National Freight

* If offering the Smart Post method, enter the Hub ID.

2. To set up free shipping through FedEx, do the following:

FedEx

- **a.** Set **Free Method** to any shipping method that you want to offer your customers at no charge. You may also select **None**. This is similar to Free Shipping, however it is listed in the FedEx section, so customers will know exactly which method is being used for their order.
- **b.** The **Free Shipping with Minimum Order Amount** option allows you to offer free FedEx shipping for orders that meet a minimum amount.

Enable	Lets you set the minimum amount for orders to qualify for free shipping. If an order does not meet the minimum amount, FedEx Free Shipping will still appear as an option,however it will be set to an amount determined by FedEx.
Disable	Does not let you set a minimum amount for orders to qualify for free shipping.

- **c.** If you choose "Enable," enter the minimum order amount in the **Minimum Order Amount for Free Shipping**.
- **d.** The **Displayed Error Message** text box is preset with a default message. You can leave this as is or edit as needed.
- e. Set Ship to Applicable Countries to one of the following:
 - All Allowed Countries
 - Specific Countries

If applicable, set **Ship to Specific Countries** to each country where your customers are allowed to ship by UPS. (Hold the Ctrl key down to select multiple options.)

- f. Set **Debug** to "Yes" or "No."
- g. Set Show Method if Not Applicable to one of the following:

Yes To list all FedEx shipping methods to customers, regardless of their availability. No To list only the methods which are available to customers.

- **h.** Enter a **Sort Order** numeric value to determine the sequence in which UPS appears when listed with other shipping methods during checkout. The number with the highest priority is 0, which puts it at the top of the list.
- 3. When the configuration is complete, click the **Save Config** button.

Enabled for Checkout	Yes		(WEBSITE)
Title	Federal Express		STORE VEV(
AccountID			(WEBSTE)
Accounting	 Please make sure to use only digfs here. No d are aboved. 		Processor Aug
Meter Number			(WIRSTIE)
Key			(WEBISITE)
Password			(WEBUTE]
Sandbox Mode	Yes		(MEBSITE)
Packages Request Type	Divide to equal weight (one request)		(WEBSITE)
Packaging	Your Packaging		(WEBSITE)
Dropoff	Regular Pickup		(W0894TE)
Weight Unit	Pounds		(WEBGTE)
Maximum Package Weight (Please consult your shipping carrier for maximum supported shipping weight)	150		(MEBUTE)
Calculate Handling Fee	Fixed	•	(WEBSITE)
Handling Applied	Per Order		(WEBSITE)
Handling Fee			(WEBS/TE)
Residential Delivery	No		(ARCENITE)
Allowed Methods	Europe First Priority 1 Day Freight	- 1	(weissing)
	2 Day Freight	- 1	
	2 Dwy		
	2 Day AM		
	3 Day Freight		
	Express Saver Ground	- 11	
	First Overnight		
	Home Delivery		
Hub ID			(WEIESTEI)
Hub IL	The feld is applicable if the Smart Postmethod selected		
Free Method	Ground	•	(WEBSITE)
Free Shipping with Minimum	Disable		(WEBSTE)
Order Amount			
Minimum Order Amount for Free Shipping			(MEBSITE)
Displayed Error Message	This shipping method is currently unavailab you would like to ship using this shipping m	ble. If	(STORE MEM)
	you would like to ship using this shipping m please contact us.	nethod,	
		- A	
Ship to Applicable Countries	Specific Countries		(WEBS/TE)
Ship to Specific Countries	Alghanistan		(WEBSITE)
	Aland Islands		
	Albania		
	Algeria		
	American Samoa Andorra		
	Angola		
	Anguilla		
	Antarctica		
	Antigue and Barbuda		
Debug	No		(WEBS/TE)
Debug Show Method if Not Applicable	No		(WERSTE) (WERSTE)

FedEx Configuration

FIELD	SCOPE	DESCRIPTION		
Enabled for Checkout	Website	Enables/disables the FedEx shipping method.		
Title	Store View	The title of this shipping option as it appears in the shopping cart checkout.		
Account ID	Website	FedEx account ID, prov	ided to you by FedEx.	
Meter Number	Website	FedEx meter number, pr	rovided to you by FedEx.	
Key	Website	FedEx account key, pro	vided to you by FedEx.	
Password	Website	Password, provided to y	ou by FedEx.	
Sandbox Mode	Website	To run FedEx transactions in a testing environment, set Sandbox Mode to "Yes." Options include: Yes / No.		
Packaging	Website	From the list, select the container type that you typically use to package products ordered from your store.		
Dropoff	Website	From the list, select the pick-up method: Regu Pickup: If you have a high volume of shipment can be cost effective to arrange regular pickup		
		Request Courier	You must call and request a FedEx courier to pick up shipments.	
		Drop Box	You must drop off shipments at your local FedEx drop box.	
		Request Courier	You must call and request a FedEx courier to pick up shipments. Drop Box: You must drop off shipments at your local FedEx drop box.	

Field Descriptions

FIELD	SCOPE	DESCRIPTION		
		Business Service Center	You must drop off shipments at your local FedEx business service center.	
		Station	You must drop off shipments at your local FedEx station.	
Maximum Package Weight	Website	The default for FedEx is 150 pounds. Consult your shipping carrier for maximum supported weight. Using the default value is recommended unless you have special arrangements with FedEx.		
Calculate Handling Fee Websi		From the list, select the method to use to calculate handling fees:. Options include: Fixed Fee / Percentage		
		The handling fee is optional additional charge that is ad shipping cost.		
Handling Applied	Website	From list, select a method for handling fees. Options inclu Package.	•	
Handling Fee	Website	Enter the amount to be charged for a handling fee based on the method you chose for calculating th amount. For example, if the charge is based on a fixed fee, enter the amount as a decimal, such as 4.90. If the handling fee is based on a percentage of the order, enter the amount as a percentage. For example, if you are charging six percent of the order, enter the value as .06.		
Residential Delivery	Website	Set to one of the following, o you sell Business-to-Consu Business-to-Business (B2B	mer (B2C) or	

FIELD	SCOPE	DESCRI	PTION	
		Yes	For B2C deliveries	
		No	For B2B deliveries	
Send Declared Value	Website	Set Send Declared Value to "Yes" to include the declared value with the shipment. Options include: Yes / No.		
Allowed Methods	Website	From the list, select the methods of shipment that you support. This depends on your FedEx account, the frequency and size of your shipments, and whether you allow international shipments. As the merchant, you might decide to offer ground shipping only.		
Free Method	Website	From the list, select the shipping method you prefer to use for offers of free shipping. This shipping method is similar to the regular Free Shipping method, however it is listed wit the FedEx shipping options and is identified a FedEx shipping.		
Free Shipping with	Website	Set to one of the following:		
Minimum Order Amount		Enable	Enables free FedEx shipping for orders that meet the minimum amount.	
		Disable	Disables free FedEx shipping with minimum order.	
Minimum Order Amount for Free Shipping	Website	If you enable Free Shipping with Minimum Order, enter the minimum order amount value in the field.		
Displayed Error Message	Store View	Type a message that is displayed when this shipping method is unavailable for any reason. Keep the default or customize it as needed.		

FIELD	SCOPE	DESCRIPTION			
Ship to Applicable Countries	Website	Specifies in which countries customers are allowed to use this shipping method.			
		All Allowed Countries	All allowed countries are able to use the free shipping method. The Allowed Countries are specified in the General configuration page.		
		Specific Countries	Limits this shipping method to only the countries specified in the Ship to Specific Countries list.		
Ship to Specific Countries	Website	The Ship to Specific Courthe Specific Courthe Specific Countries op each country where you country whe	tion is selected. Select ffer shipping by FedEx. s, hold down the Ctrl		
Debug	Website	Specifies if data transmis store and FedEx is logged debugging. Unless there is an issue t and logged, this should be	hat needs to be tracked		
Show Method if Not Applicable	Website	Options include:			

FIELD	SCOPE	DESCRIPTION		
		Yes	The FedEx shipping option is displayed in the shipping methods list, regardless of whether the order qualifies to use it.	
		No	The FedEx shipping option is not displayed in the shipping methods list if it is not applicable to the order (for example, if the order weight exceeds the maximum weight amount).	
Sort Order	Website	This valu	sort order value for this shipping method. le, relative to other shipping methods, es the displayed order of shipping options put.	
		order bas	methods are displayed in ascending sed on sort order value. Set to 0 for sort order.	

DHL

DHL

DHL offers integrated international services and tailored, customer-focused solutions for managing and transporting letters, goods and information.

Process Overview: Step 1: Enable DHL Step 2: Enter Package Description and Handling Fee Step 3: Specify Allowed Shipping Methods Step 4: Specify Applicable Countries

Step 1: Enable DHL

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Shipping Methods**.
- 2. Click to expand the **DHL** section. Then, do the following:
 - a. Set Enabled for Checkout to "Yes."
 - **b.** In the **Title** field, type a name that will be used to refer to this shipping method during checkout.
 - **c.** In most cases, you can accept the default **Gateway URL**. However, if DHL has given you an alternate URL, enter the value in this field.
 - **d.** Use the credentials provided by DHL to complete the following fields:
 - Access ID
 - Password
 - Account Number

Step 2: Enter Package Description and Handling Fee

- 1. In the **Content Type** list, select the option that best describes the type of package you ship:
 - Documents
 - Non documents
- **2.** The handling fee is optional, and appears as an additional charge that is added to the DHL shipping cost. If you want to include a handling fee, do the following:

- **a.** In the **Calculate Handling Fee** list, select the method you want to use to calculate handling fees:
 - Fixed
 - Percentage
- **b.** In the **Handling Applied** list, select how you want the handling fees applied:
 - Per Order
 - Per Package
- **c.** In the **Handling Fee** field, enter the amount to be charged, based on the method you have chosen to calculate the amount. For example, if the charge is based on a fixed fee, enter the amount as a decimal, such as: 4.90. However, if the handling fee is based on a percentage of the order, enter the amount as a percentage. For example, if you are charging six percent of the order, enter the value as: .06.
- **d.** You can allow the total order weight to be broken up to ensure an accurate calculation of shipping charges. To permit this, set **Divide Order Weight** to "Yes."
- e. Set the **Weight Unit** of the package to one of the following:
 - Pounds
 - Kilograms
- f. Set the **Size** of the package to one of the following:
 - Regular
 - Specific

If you are using **Specific**, enter the **Height**, **Depth**, and **Width** of the package. Specify these numbers in centimeters.

Step 3: Specify Allowed Shipping Methods

1. In the **Allowed Methods list**, select each shipment method that you support. (Hold the Ctrl key down to select multiple options.)

To display the correct list of shipping methods, you must first specify the Country of Origin in Shipping Settings.

- **2.** Enter the **Ready Time** in hours after submission, that it takes for a package to be ready to ship.
- **3.** Edit the **Displayed Error Message** as needed. This message appears when a selected method is unavailable.
- **4.** In the **Free Method** list, select the shipping method you prefer to use for offers of free shipping. Then, set the **Free Shipping with Minimum Order Amount** to one of the following:

Enable	If offering Free Shipping with Minimum Order, enter the
	Minimum Order Amount for Free Shipping.

Disable Does not apply free DHL shipping to any orders.

This is similar to the standard Free Shipping method, but appears in the DHL section so customers know which method is used for their order.

5. Enter the **Minimum Order Amount for Free Shipping** that must be met for a package to qualify.

Step 4: Specify Applicable Countries

- 1. Set Ship to Applicable Countries to one of the following:
 - All Allowed Countries
 - Specific Countries

If shipping to specific countries, select each country from the **Ship to Specific Countries** list.

2. Set Show Method if Not Applicable to one of the following:

Yes	Displays all options, even if not applicable to the order.
No	Displays only applicable options.

- **3.** In the **Sort Order** field, type a numeric value to determine the sequence in which DHL appears when listed with other shipping methods during checkout.
- **4.** To create a log file with the details of DHL shipments made from your store, set **Debug** to "Yes."
- 5. When complete, click the **Save Config** button to save your changes.

Enabled for Checkout	Yes 🔹	potnerit
Title	DHL	(STORE, VIEW)
Gateway URL	https://mipi-ea.dhi.com/XMLShippingServiet	(MEBSITE)
Access ID		twittenantial
Password		(WEBSITE)
Account Number		[MEBGITE]
Content Type	Documents •	[WEBSITE]
Calculate Handling Fee	Fixed	(WEBSITE)
Handling Applied	Per Order *Per Order *Per Order* allows single handling he for entre order *Per Package* allows individual handling fee for each package	(Memoral)
Handling Fee)	[WEBGITE]
Divide Order Weight	Ves Allows breaking total order weight into smaller pieces # # exercts 70 kg to ensure accurate calculation of shipping charges.	ISTORE MEM
Weight Unit	Kilograms •	(STORE VIEW)
Size	Regular •	ISTORIE MEWI
Allowed Methods	Eary stop Sprinter Sprinter Ecoretion Ecoretion Ecoretion Ecoretion Modical express Modical express Ecoretis voiduale Ecoretis Ecoretis voiduale Ecoretis 000	(MEROLE)
Ready time	Fackage ready time after order submission (in hours)	Interaction
Displayed Error Message	This shaping method is currently unavailable if your would be to this using this shipping method, please contact us.	Interesting
Free Method	None •	EVERINE (
Free Shipping with Minimum Order Amount	Disable •	(WEBOTTE)
Minimum Order Amount for Free Shipping		[WEBS/TQ]
Ship to Applicable Countries	Specific Countries	(WESSITE)
Ship to Specific Countries	Afghanistan + Afghanistan + Alania - Angena - An	(educate)
	Andorra Angola Angulla Antarctica Antarctica	
Show Method if Not Applicable	No	(MUBSZTE)
Debug	No •	(WEBSITE)

DHL Configuration

FIELD	SCOPE	DESCRIPTION
Enabled for Checkout	Website	Enables/disables the DHL shipping method.
Title	Store View	The title of this shipping method as it appears during checkout.
Gateway URL	Website	In most cases, you can accept the default Gateway URL. However, if DHL has given you an alternate URL, enter the value in this field.
Access ID	Website	The DHL shipper account access ID, provided to you by DHL.
Password	Website	The DHL shipper account password, provided to you by DHL.
Account Number	Website	The DHL shipper account number, provided to you by DHL.
Content Type	Website	In the list, select the option that best describes the type of package you ship. Options include: Package / Letter.
Calculate Handling Fee	Website	The handling fee is optional and appears as an additional charge added to the DHL shipping cost. From the list, select the method that you want to use to calculate handling fees. Options include: Fixed Fee / Percentage.
Handling Applied	Website	From the list, select how you want the handling fees applied. Options include: Per Order / Per Package.
Handling Fee	Website	Enter the amount to be charged for a handling fee, based on the method you have chosen to calculate the amount. For example, if the charge is based on a fixed fee, enter the amount as a decimal, such as 4.90. However, if the handling fee is based on a percentage of the order, enter the amount as a percentage. For example, if you are charging six percent of the order, enter the

value as .06.

Field Descriptions

DHL		

FIELD	SCOPE	DESCRIPTION	
Divide Order Weight	Store View	Determines if the weight of an order over 70kg ca be divided into smaller units to ensure an accurate shipping charge. Options include: Yes / No.	
Weight Unit	Store View	Determines the unit of measurement for weight that is used in shipping calculations. Options include: Pounds / Kilograms	
Size	Store View	Determines the size of the package. Options include:	
		Regular	Packages shipped conform to of DHL's standard packaging methods. In the Allowed Methods list, select each packaging method used to ship products from your store.
		Specific	If packages shipped have custom dimensions, complete the following: Height (cm) Depth (cm) Width (cm)
Allowed Methods	Website	In the list, select each support.	shipment method that you
Ready Time	Website	Specifies when the package will be ready for pickup, in hours, after an order is submitted.	
Displayed Error Message	Store View	This message appears when DHL becomes unavailable for any reason. You can use the default message or enter a message of your own.	

FIELD	SCOPE	DESCRIPTION	
Free Method		This shipping method is sin Shipping method, however DHL shipping options and is shipping. In the list, select to you prefer to use for offers of	it is listed within the s identified as DHL the shipping method
Free Shipping with	Website	Set to one of the following:	
Minimum Order Amount		Enable	To allow free DHL shipping for orders that meet the minimum amount.
		Disable	To not offer free DHL shipping with minimum order.
Minimum Order Amount for Free Shipping	Website	If you enable Free Shipping enter the minimum order an	
Ship to Applicable Countries	Website	Specifies which country cu use this shipping method.	stomers are allowed to
		All Allowed Countries	All allowed countries are applicable to use the free shipping method. The Allowed Countries are specified in the General configuration page.
		Specific Countries	Limits this shipping option to the countries specified in the Ship to Specific Countries list.

DHL

FIELD	SCOPE	DESCRI	PTION
Ship to Specific Countries	Website	Specifies the countries where DHL shipments can be sent. This selected countries list is used if Specific Countries is selected in the Ship to Applicable Countries option.	
Show Method if Not	Website	Options include:	
Applicable		Yes	DHL always appears as a shipping option during checkout, even if not applicable to the order.
		No	DHL appears as a shipping option during checkout only if applicable to the order.(i.e. Order weight exceeds the maximum weight amount.)
Debug	Website	Creates a	log file with error information.
Sort Order	Website	Sets the sort order value for this shipping method. This value, relative to other shipping methods, determines the displayed order of shipping options in checkout. Shipping methods are displayed in ascending order based on sort order value. Set to 0 for highest sort order.	

Package Type by Carrier

The following tables list the shipping methods and supported package types for U.S. and international shipments, by carrier.

- Custom packaging has been added to each shipping method of each shipping carrier.
- Shipping methods are divided into U.S. and International. Those that are marked as "U.S." are for US domestic shipments only. Those that are marked as "International" can be those shipped from the U.S. to other countries, from other countries to the U.S. and within countries other than the U.S. FedEx does not offer domestic shipments for countries other than the U.S. at this time. USPS offers shipments from the U.S. only for both domestic and international.
- For international shipping, available package types sometimes depend on the country of origin (U.S. or other). If a shipment originates outside of the U.S., the available package types are filtered according to the types that are acceptable. For shipments that originate in countries other than the U.S., the full list of package types available for the selected shipping carrier is provided.

FedEx (U.S.)

Package Types: FedEx (U.S.)

SHIPPING METHOD	PACKAGE TYPE
FedEx First Overnight	FedEx Envelope
	FedEx Pak
	FedEx Box
	FedEx Tube
	Your Packaging
FedEx Priority Overnight	(same as above)
FedEx Standard Overnight	(same as above)
FedEx 2Day	(same as above)
FedEx Express Saver	FedEx Envelope
	FedEx Pak
	Your Packaging
FedEx Ground	Your Packaging
FedEx Home Delivery	
FedEx SmartPost	

FedEx (International)

Package Types: FedEx (Int'I)

0)1	
SHIPPING METHOD	PACKAGE TYPE
FedEx International First	FedEx Envelope
	FedEx Pak
	FedEx Box
	FedEx Tube
	Your Packaging
FedEx International Priority	FedEx Envelope
	FedEx Pak
	FedEx Box
	FedEx 10 kg Box
	FedEx 25 kg Box
	FedEx Tube
	Your Packaging
FedEx International Ground	Your Packaging
FedEx Europe First Priority	FedEx Envelope
	FedEx Pak
	FedEx 10 kg Box
	FedEx 25 kg Box
	Your Packaging

UPS (U.S.)

Package Types: UPS (U.S.)

SHIPPING METHOD	PACKAGE TYPE
UPS Next Day Air Early AM	Small Express Box
	Medium Express Box
	Large Express Box
	UPS Express Tube
	UPS Pak
	UPS Letter
	Your Packaging
LIDS and Day Air	

UPS 2nd Day Air

(same as above)

Package Types: UPS (U.S.) (cont.)

SHIPPING METHOD	PACKAGE TYPE
UPS Next Day Air	(same as above)
UPS 2nd Day Air AM	(same as above)
UPS 3 Day Select	Your Packaging
UPS Ground	Your Packaging

UPS (International)

Package Types: UPS (Int'I)

SHIPPING METHOD	PACKAGE TYPE
UPS Worldwide Express	Small Express Box
	Medium Express Box
	Large Express Tube
	UPS Express Tube
	UPS 10 kg Box
	UPS 25 kg Box
	UPS Pak
	UPS Letter
	Customer Packaging
UPS Worldwide Express Plus	(same as above)
UPS Worldwide Saver	(same as above)
UPS Worldwide Expedited	(same as above)
UPS Worldwide Expedited	Small Express Box
	Medium Express Box
	Large Express Tube
	UPS Express Tube
	UPS 10 kg Box
	UPS 25 kg Box
	UPS Pak
	Customer Packaging

USPS (International)

Package Types: USPS (Int'I)

	· ·
SHIPPING METHOD	PACKAGE TYPE
Express Mail [®] International Flat Rate Envelope	Express Mail International Flat Rate Envelope
Express Mail Flat Rate Envelop Hold for Pickup	Express Mail International Flat Rate Envelope
Priority Mail International Large Flat Rate Box	Priority Mail International Medium Flat Rate Box
Priority Mail International Small Flat Rate Box	Priority Mail International Small Flat Rate Box
Priority Mail International Flat Rate Envelope	Priority Mail International Flat Rate Envelope
Global Express Guaranteed (GXG)	Large Package/Non-Rectangular (Regular and Medium) Variable
USPS GXG Envelopes	Large Package/Rectangular (Regular and Medium)
	Large Package/Non-Rectangular (Regular and Medium) Variable
Express Mail International	(same as above)
Priority Mail International	(same as above)
First-Class Mail International Package	(same as above)

DHL (International)

Package Types: DHL (Int'I)

SHIPPING METHOD	PACKAGE TYPE	
Express	Package	
Express International	Letter	



CHAPTER 51: Shipping Labels

Magento Community Edition has a high level of integration with major shipping carriers that gives you access to carrier shipping systems to track orders, create shipping labels, and more.

Topics in this chapter:

- Shipping Label Setup
- Creating Shipping Labels
- Package Configuration



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 downloaded to your computer. Depending on your browser settings, you can open the file at once and print the labels. Each shipping label appears on a separate page in the PDF file.

Shipment Workflow

When you create a shipping label, Magento prompts you for information about packaging you want to use (type, size, etc.) and which products go with which package. When you finish, Magento connects to the shipping carrier web-services, creates an order in its system, and receives the shipping label for the shipment. The tracking number(s) are also received and added in the Admin.

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 connection or any other reason, the shipment is not created.

Tracking Number Workflow

Magento receives the tracking numbers related to the shipment when labels are generated. and inserts the numbers into the Shipping and Tracking Information section of the order. If you generate the same shipping labels multiple times, the original tracking numbers are preserved.

Shipping Label Setup

Shipping label settings must be made at the product level, as well as in the configuration of each carrier. Complete the configuration for each carrier that you intend to use to produce shipping labels.

To configure shipping labels:

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. The **Country of Manufacture** field is required for each product that is shipped internationally by USPS and FedEx, Update the field for each product record, as needed.



Country of Manufacture

3. When complete, click the **Save** button.

If you have many products that need to be updated with the same information, do the following:

- **a.** In the Manage Products list, select the checkbox of each product that needs to be updated. For example, all products that are manufactured in China.
- b. Set the Actions control to "Update Attributes," and click the Submit button.
- c. In the Update Attributes form, find the Country of Manufacture field and select the Change checkbox. Then, select the country from the list and click the Save button.
- 4. On the Admin menu, select **System > Configuration**. Then, do the following:
 - a. In the panel on the left, under Sales, select **Shipping Settings**. Click to 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.

Drigin		
Country	United States	▼ [WEBSITE]
Region/State	California	▼ [WEBSITE]
ZIP/Postal Code	90232	[WEBSITE]
City	Culver City	[WEBSITE]
Street Address	10441 Jefferson Blvd., Suite 200	[WEBSITE]
Street Address Line 2		[WEBSITE]

Origin

b. In the Configuration panel under Sales, select **Shipping Methods**. Click to expand the **USPS** section, and verify that the following fields are complete:

Secure Gateway URL	This field is pre-populated by Magento.
Password	The password is provided by USPS, and gives you access to their system through Web Services.
Length, Width Height, Girth	The default dimensions of the package. To make these fields appear, set Size to "Large,"

- c. Click to 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 Configuration panel under General, select **Store Information**. Verify that the fields in this section are complete. If you have multiple stores, and the contact information differs from the default, set **Current Configuration Scope** to the store view and verify that the information is complete. If any of this information is missing, an error message will appear when you try to print shipping labels.

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.

tore Information			
Store Name		[STORE VIEW]	
Store Contact Telephone		[STORE VIEW]	
Country	Please Select	▼ [WEBSITE]	
/AT Number		[WEBSITE]	
	Validate VAT Number		
Store Contact Address		[STORE VIEW]	
		1	

Store Information

e. When complete, click the **Save Config** button.

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.

Create Shipping Labels

You can easily create shipping labels for new and existing orders from the Admin of your store. 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. Magento contacts the shipping carrier, creates an order in the carrier's system, and receives a shipping label and tracking number for the shipment. An individual order is created for each package shipped. A single shipment with multiple packages receives multiple shipping labels.

Process Overview:

Step 1: Contact Your Shipping Carriers

Step 2: Update the Configuration for Each Carrier

Step 3: Create Shipping Labels

Step 4: Print Shipping Labels

Step 1: Contact Your Shipping Carriers

Before you begin, make sure that your shipping accounts are set up to process labels. Some carriers might charge an additional fee to add shipping labels to your account.

- 1. Contact each carrier that you use to activate shipping labels for your store.
- **2.** Follow the instructions provided by each carrier to add shipping label support to your account.

FedEx	Contact FedEx Web Services regarding their label evaluation process.
USPS	Contact uspstechsupport@esecurecare.net to request that API Signature Confirmation V3 be enabled for your live USPS API Access account.
UPS	Contact UPS to confirm your account type supports shipping labels. To generate shipping labels, you must use the UPS XML option.
DHL	Contact the DHL Resource Center to learn more about their services or send an inquiry through their Contact Center.

Step 2: Update the Configuration for Each Carrier

- 1. Make sure that your Store Information is complete.
- **2.** Follow the instructions below for each carrier account that has been activated for label printing.

UPS

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 menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, select **Shipping Methods**.
- **3.** Click to 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, click the **Save Config** button.

USPS

The United States Postal Service ships both domestically and internationally.

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Sales, select Shipping Methods.
- 3. Click to 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
- 4. When complete, click the **Save Config** button.

FedEx

FedEx ships domestically and internationally. Stores located outside the United States can create FedEx labels for international shipments only.

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under sales, select Shipping Methods.
- **3.** Click to expand the **FedEx** section. Then, make sure that the following FedEx credentials are correct:
 - Meter Number
 - Key
 - Password
- 4. When complete, click the **Save Config** button.

DHL

DHL provides international shipping services.

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under sales, select Shipping Methods.
- 3. Click to 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
- 4. When complete, click the Save Config button.

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 menu, select **Sales > Orders**.
- **2.** Find the order in the list, and click to open the record. The status of the order must be either "Pending" or "Processing."

- **3.** In the upper-right corner, click the **Ship** button. Then, confirm the shipping information according to carrier requirements.
- 4. In the lower-right corner, select the **Create Shipping Label** checkbox. Click the **Submit Shipment** button, and do the following:
 - **a.** To add products from the order to the package, click the **Add Products** button. The Quantity column shows the maximum number of products that are available for the package.
 - Select the check box of each product to be added to the package and enter the Quantity of each. Then, click the Add Selected Product(s) to Package button.
 - To add a new package, click the Add Package button.
 - To delete a package, click the **Delete Package** button.

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 is not reflected in your store.

- **5.** When complete, click **OK**.
 - If you need to cancel an order, click the **Cancel** button. A shipping label will not be created, and the Create Shipping Label checkbox is cleared.
- 6. Magento now 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 menu, select **Sales > Orders**.
- 2. Find the order in the list and click to open the Shipping form. Then, do the following:
 - **a.** In the Shipping and Tracking Information section, click the **Create Shipping Label** button.
 - **b.** Distribute the ordered product(s) to the appropriate package(s), and click **OK**.
 - **c.** To review the package information, click the **Show Packages** button.

Magento connects to the shipping carrier system, submits an order, and receives a shipping label and a tracking number.

If a shipping label for this shipment already exists in the system, it is replaced with a new one. However, existing tracking numbers are not replaced. Any new tracking number is added to the existing one.

Step 4: Print Shipping Labels

Shipping labels are generated in PDF format, and can be printed from the Admin panel. Each label includes the order number and package number.

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 menu, do one of the following:
 - Select **Sales > Orders**. Find the order in the list, and click to open the record. In the panel on the left, select **Shipments**. Then, click to open the shipment record.
 - Select **Sales > Shipments**. Find the order in the list, and click to open the record.
- **2.** To download the PDF file, go to the Shipping and Tracking section of the form and click the **Print Shipping Label** button. 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 has generated labels for the shipment. If the button is missing, click the Create Shipping Label button. The button will appear after Magento receives the label from the carrier.

Method 2: Print Labels for Multiple Orders

- 1. On the Admin menu, do one of the following:
 - Select Sales > Orders.
 - Select Sales > Shipments.
- 2. In the list, select the checkbox of each order that has shipping labels to be printed.
- 3. In the upper-right corner, set the Actions control to "Print Shipping Labels."
- 4. Click the **Submit** button.

A complete set of labels is printed for each shipment that is related to the selected orders.

Required Carrier Settings

FIELD	DESCRIPTION			
Туре	Package types differ by carrier and method. The default package type for each carrier is initially selected. USPS does not require the package type for domestic shipments.			
Customs Value	•	ents only) The declared value or sales price international shipment.		
Total Weight	calculated automatic	Il products added to the package is cally. The value can also be changed ed as pounds or kilograms.		
Length, Width, Height		age dimensions are used for custom can specify the measurements units as s.		
Signature Confirmation	Indicates if a signature is required to confirm receipt of the package. Although the options vary by carrier and shipping method. Options include:			
	Not Required	No confirmation of delivery is sent to the store by the shipping carrier.		
	No Signature	A delivery confirmation without the signature of the recipient is sent to the store by the shipping carrier.		
	Signature Required	The shipping carrier obtains the signature of the recipient and provides the store with a printed copy.		
	Direct	(FedEx Only) FedEx obtains a signature from someone at the delivery address. If no one is available to sign for the package, the carrier tries to deliver the package at another time.		
	Indirect	(FedEx Residential Deliveries Only) FedEx obtains the signature of someone, possibly a neighbor or building manager, at the delivery address. The recipient can leave a signed FedEx door tag to authorize the package to be left without anyone present to sign for it.		

FIELD	DESCRIPTION	
	Contents	(USPS Only) Select one of the following descriptions of the package: Gift Documents Commercial Sample Returned Goods Merchandise Other
	Explanation	(USPS Only) A detailed description of the package contents.
	Adult Required	The shipping carrier obtains the signature of an adult recipient and provides the store with a printed copy.

Required Carrier Settings (cont.)

Create Packages

The Create Packages pop-up window appears if you choose to create a shipping label. You can start configuring the first package at once.

Package 1				
ype Customer Packaginţ 💌	Total Weight	Length Width	Required Add Product	S Delete Package

Create Package

To configure a package(s):

- **1.** When the Create Packages window appears, do the following to complete the description of Package 1:
 - a. Select the Type of packaging. (Not required for UPS domestic shipments.)
 - b. Enter the **Total Weight** and verify that the unit of measurement is correct..
 - **c.** Enter the **Length**, **Width**, and **Height** of the package, and verify that the unit of measurement is correct.
 - d. Set Signature Confirmation as needed.

If you select the non-default value in the Type field or require a signature confirmation, the price of a shipment may differ from the rate you quoted the customer.

e. To view a list of shipped products and add them to the package, click the **Add Products** button.

The Qty column is pre-populated with the maximum available quantity to add (for the Package 1 this number is equal to the total shipped quantity of the product).

- f. Specify the products and quantities. To add the products to the package, click the Add Selected Product(s) to Package button in the header of the grid. The products are added to the package.
- **2.** To view a list of shipped products and add them to the package, click the **Add Products** button.

The Qty column is pre-populated with the maximum available quantity to add (for the Package 1 this number is equal to the total shipped quantity of the product).

3. Specify the products and quantities. To add the products to the package, click the Add Selected Product(s) to Package button in the header of the grid. The products are added to the package.

- To add a new package, click the **Add Package** button in the window header. You can add several packages, and edit them simultaneously.
- To delete a package, click the **Delete Package** button.

After products have been added to the package, the quantity cannot be edited directly.

To increase the quantity:

- 1. Click the Add Selection button.
- **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. Click the Add Selection button.
- **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 between packages and all necessary information is specified.

4. When complete, click the **OK** button to generate the labels.

If you need to stop the process, click the **Cancel** button. The packages are not saved, and the shipping label creation is canceled.

FIELD	DESCRIPTION
Туре	(Non-domestic only) Identifies the type of a package. Available package types are different for each shipping carrier, and depend on the shipping method selected when the order is created.
	When the Create Packages pop-up window opens, the default package for the shipping carrier set in system configuration is selected in the Type field. For shipping labels created for DHL, FedEx, and UPS shipments, the "Type of Goods" field is set to "Merchandise."
	If you select a package, that is not designed by a shipping carrier, you must enter the package dimensions

Field Descriptions

FIELD	DESCRIPTION			
Total Weight	The total weight of a package. The field is pre-populated with the total weight of products in a package, after you add them, but can be edited manually. The measurement units can be specified using the drop-down menu next to the field; select between pounds and kilograms.			
Length	field is enabled if the measurement units	age, integer and floating point numbers. The e custom package type is used. The can be specified using the drop-down menu eld; select between inches and centimeters.		
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	gnature Confirmation Establishes how delivery is confirmation. Options inc			
	Not Required	No delivery confirmation letter is sent.		
	No Signature	A delivery confirmation letter without a recipient's signature is sent to you.		
	Signature Required	The shipping carrier obtains the recipient's signature and provides you with its printed copy.		
	Adult Required	The shipping carrier obtains the adult recipient's signature and provides you with its printed copy.		
	Direct	(FedEx only) FedEx obtains a signature from someone at the delivery address and reattempts delivery if no one is available to sign for the package.		

FIELD	DESCRIPTIO	N
	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 field availability and options may vary slightly for different shipping methods. For the most up to date information please refer to shipping carrier's resources.
Contents	(USPS only) De include:	scription of the package contents. Options
	Gift	
	Documents	
	Commercial Sa	
	Returned Goods	3
	MerchandiseOth	ner
Explanation	(USPS only) De	tailed description of the package content.



Taxes

In this section...

Managing Taxes

Value Added Tax (VAT)

Quick Reference



CHAPTER 52: Managing Taxes

Magento provides a variety of options to help you meet the tax requirements for your locale. Magento also supports the calculation of Value-Added Tax (VAT) for business to-business transactions in the European Union. Admin permissions can be set to restrict access to tax resources, based on the business "need to know."

Tax classes are used to define "tax rules." Tax rules incorporate a combination of product class, customer class and tax zone, and rate. Each type of customer can be assigned a customer class when you define them, and each product is assigned a tax class. 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 shopping cart, and the region (as determined by the customer's shipping address, billing address or shipping origin).

Important! No guarantee is made regarding any information in this guide. Please contact an expert before making decisions about tax matters.

General Tax Settings

The following instructions take you through the basic tax setup for your store. Before setting up your taxes, make sure that you are familiar with the tax requirements of your locale. Then, you can complete the tax configuration as needed for your store.

Admin permissions can be set to restrict access to tax resources, based on the business "need to know." To create an Admin role with access to tax settings, select both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role, because the shipping settings determine the store tax rate used for catalog prices.

Process Overview: Step 1: Set Up Tax Classes Step 2: Complete the Calculation Settings Step 3: Set Up the Default Tax Destination Step 4: Complete the Display Settings

Step 1: Set Up Tax Classes

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Sales, select **Tax**.
- **3.** If you have multiple websites, set **Current Configuration Scope** to the website where the tax configuration applies.
- 4. Click to expand the **Tax Classes** section.



Tax Classes

- 5. Set **Tax Class for Shipping** to the appropriate class. The default classes are:
 - Taxable Goods
 - Shipping
 - Tax Exempt

Step 2: Complete the Calculation Settings

1. Click to expand the **Calculation Settings** section.

Calculation Settings		C
Tax Calculation Method Based On	Total 🔻	[WEBSITE]
Tax Calculation Based On	Shipping Address 🔻	[WEBSITE]
Catalog Prices	Excluding Tax 🔻	[WEBSITE]
	Whether catalog prices entered by admin include tax.	
Shipping Prices	Excluding Tax 🔻	[WEBSITE]
	Whether shipping amounts entered by admin or obtained from gateways include tax.	
Apply Customer Tax	After Discount	[WEBSITE]
Apply Discount On Prices	Excluding Tax 🔻	[WEBSITE]
	Apply discount on price including tax is calculated based on store tax, if "Apply Tax after Discount" is selected.	
Apply Tax On	Custom price if available	[WEBSITE]
Enable Cross Border Trade	No	[WEBSITE]
	When catalog price includes tax, enable this setting will fix the price no matter what the customer's tax rate is.	

Tax Calculation Settings

- 2. In the **Tax Calculation Method Based On** field, select whether the tax is based on the price of each unit, or on the "row total" (that is, the total for a line item in the order, accounting for any discounts).
- **3.** In the **Tax Calculation Based On** field, select whether the tax is calculated based on the customer's shipping address, billing address, or your store's shipping origin.
- **4.** In the **Catalog Prices** field, specify whether the catalog prices of items include tax or exclude tax.
- **5.** In the **Shipping Prices** field, select whether the shipping amounts include tax or exclude tax.
- 6. In the **Apply Customer Tax** field, select whether tax is applied to the original or discounted price.
- **7.** In the **Apply Discount on Prices** field, select whether any discounts applied include the tax or exclude it.
- **8.** In the **Apply Tax On** field, select whether tax is applied to custom prices or to original prices.
- **9.** In the **Enable Cross Border Trade** field, select "Yes" to use consistent pricing across different tax rates, or select "No" to vary the price by tax rate.

Important! If cross-border trade is enabled, the profit margin changes by tax rate. Profit is determined by the formula (Revenue - CustomerVAT - CostOfGoodsSold). To enable cross-border trade, set prices to include tax.

Step 3: Set Up the Default Tax Destination Calculation

- 1. Click to expand the **Default Tax Destination Calculation** section.
- 2. Select the **Default Country** to be used for tax calculations.
- 3. Select the **Default State** to be used for tax calculations.
- 4. Select the **Default Post Code** to be used for tax calculations.

An asterisk can be used as a wildcard to represent all State and Post Code values.

Default Tax Destination Calculation		۰
Default Country	United States •	[STORE VIEW]
Default State	*	[STORE VIEW]
Default Post Code	*	[STORE VIEW]

Default Tax Calculation Settings

Step 4: Complete the Price Display Settings

Important! Some combinations of settings related to a price display that both includes and excludes tax can be confusing to the customer. To avoid triggering a warning message, see the recommended settings.

1. Click to expand the **Price Display Settings** section. Then, do the following:

Price Display Settings				٢
Display Product Prices In Catalog	Excluding Tax	•	[STORE VIEW]	
Display Shipping Prices	Excluding Tax	¥	[STORE VIEW]	

Price Display Settings

- a. Set **Display Product Prices in Catalog** to one of the following:
 - Excluding Tax
 - Including Tax
 - Including and Excluding Tax

If you set the Display Product Prices field to "Including Tax," the tax appears only if there is a tax rule that matches the tax origin, or if Magento detects that the customer address matches the tax rule. This can happen after a customer creates an account, logs in, or uses the Tax and Shipping estimation tool in the cart.

- **b.** Set **Display Shipping Prices** to one of the following:
 - Excluding Tax
 - Including Tax
 - Including and Excluding Tax
- 2. Click to expand the **Shopping Cart Display Settings** section.

For each section listed, chose how you want taxes and prices to be shown for products in a shopping cart, according to the requirements of your store and locale.

Shopping Cart Display Settings		٥
Display Prices	Excluding Tax 🔻	▼ [STORE VIEW]
Display Subtotal	Excluding Tax 🔻	[STORE VIEW]
Display Shipping Amount	Excluding Tax 🔻	[STORE VIEW]
Display Gift Wrapping Prices	Excluding Tax 🔻	▼ [STORE VIEW]
Display Printed Card Prices	Excluding Tax 🔻	▼ [STORE VIEW]
Include Tax In Grand Total	No	▼ [STORE VIEW]
Display Full Tax Summary	No	▼ [STORE VIEW]
Display Zero Tax Subtotal	No	▼ [STORE VIEW]

Shopping Cart Display Settings

3. Click to expand the **Orders, Invoices, Credit Memos Display Settings** section. Then, select how prices and taxes are displayed in orders, invoices, and credit memos.

iders, Invoices, Credit Memos	Display Settings		
Display Prices	Excluding Tax	ITORE VIEW	
Display Subtotal	Excluding Tax	ISTORE VIEW	
Display Shipping Amount	Excluding Tax	ISTORE VIEW)	
Include Tax In Grand Total	No	ISTORE VIEW]	
Display Full Tax Summary	No	ISTORE VIEW	
Display Zero Tax Subtotal	No	ISTORE VIEW)	

Orders, Invoices, Credit Memos Display Settings

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
-------	-------	-------------

TAX CLASSES

FIELD	SCOPE	DESCRIPTION
Tax Class for Shipping	Website	Identifies the tax class that is used for shipping. Options include all available product tax classes: None Taxable Goods Shipping Tax Exempt
CALCULATION SETTING	S	
Tax Calculation Method Based On	Website	Determines whether the tax is based on the unit price of the product, line item total, accounting for any discounts, or total. Options include: Unit Price Row Total Total
Tax Calculation Based On	Website	Determines if the tax calculation is based on the shipping address, billing address, or the shipping origin. Options include: Shipping Address Billing Address Shipping Origin
Catalog Prices	Website	Determines if catalog prices include or exclude tax. Options include: Excluding Tax Including Tax
Shipping Prices	Website	Determines in shipping prices include or exclude tax. Options include: Excluding Tax Including Tax
Apply Customer Tax	Website	Determines if tax is applied before, or after a discount. Options include: Before Discount After Discount
Apply Discount on Prices	Website	Determines if discount prices include or exclude tax. Options include:

FIELD	SCOPE	DESCRIPTION
		Excluding Tax
		Including Tax
Apply Tax On	Website	Determines if the tax applies to the original price, or to a custom price, if available. Options include:
		Custom price if available
		Original price only
Enable Cross Border Trade	Website	When enabled, applies consistent pricing across borders of regions with different tax rates. Options include: Yes / No
		Using cross-border trade adjusts the profit margin by tax rate.

DEFAULT TAX DESTINATION CALCULATION

Default Country	Store View	Determines the country upon which tax calculations are based. Options include: All countries
Default State	Store View	Determines the state upon which tax calculations are based. An asterisk (*) can be used as a wildcard to indicate all states within the selected country. Options include: All states in selected country
Default Post Code	Store View	Identifies the postal code or ZIP code upon which tax calculations are based. An asterisk (*) can be used as a wildcard to indicate all postal codes within the selected state.
PRICE DISPLAY SETTIN	IGS	
Display Product Prices in Catalog	Store View	Determines if product prices published in the catalog include or exclude tax, or show two versions of the price; one with, and the other without tax.

Options include:

Excluding Tax

Including Tax

FIELD	SCOPE	DESCRIPTION
		Including and Excluding Tax
		If you set the Display Product Prices field to "Including Tax," the tax appears only if there is a tax rule that matches the tax origin, or if there is a customer address that matches the tax rule. Events that can trigger a match include customer account creation, login, or the use of the Tax and Shipping estimation tool in the shopping cart.
Display Shipping Prices	Store View	Determines if shipping prices include or exclude tax, or show two versions of the shipping price; one with, and the other without tax. Options include: Excluding Tax Including Tax Including and Excluding Tax

SHOPPING CART DISPLAY SETTINGS

Display Prices	Store View	Determines if shopping cart prices include or exclude tax, or show two versions of the price; one with, and the other without tax. Options include:
		Excluding Tax
		Including Tax
		Including and Excluding Tax
Display Subtotal	Store View	Determines if the shopping cart subtotal includes or excludes tax, or shows two versions of the subtotal; one with, and the other without tax. Options include: Excluding Tax Including Tax Including and Excluding Tax
Display Shipping Amount	Store View	Determines if the shopping cart shipping amount includes or excludes tax, or shows two versions of the shipping amount; one with, and the other without tax. Options include:

FIELD	SCOPE	DESCRIPTION
		Excluding Tax
		Including Tax
		Including and Excluding Tax
Include Tax in Grand Total	Store View	Determines if tax is included in the shopping cart grand total. Options include: Yes / No
Display Full Tax Summary	Store View	Determines if the shopping cart includes a full tax summary. Options include: Yes / No
Display Zero Tax Subtotal	Store View	Determines if the shopping cart includes a tax subtotal when the tax is zero. Options include: Yes / No

ORDERS, INVOICES, CREDIT MEMOS DISPLAY SETTINGS

Display Prices	Store View	Determines if the prices on sales documents include or exclude tax, or if each document shows two versions of the price; one with, and the other without tax. Options include: Excluding Tax Including Tax Including and Excluding Tax
Display Subtotal	Store View	Determines if the subtotal on sales documents includes or excludes tax, or if each document shows two versions of the subtotal; one with, and the other without tax. Options include: Excluding Tax Including Tax Including and Excluding Tax
Display Shipping Amount	Store View	Determines if the shipping amount on sales documents includes or excludes tax, or if each document shows two versions of the subtotal; one with, and the other without tax.Options include: Excluding Tax Including Tax Including and Excluding Tax

FIELD	SCOPE	DESCRIPTION
Include Tax in Grand Total	Store View	Determines if the grand total on sales documents includes tax. Options include: Yes / No
Display Full Tax Summary	Store View	Determines if the full tax summary appears on sales documents. Options include: Yes / No
Display Zero Tax Subtotal	Store View	Determines of the subtotal section on sales documents appears when no tax is charged. Options include: Yes / No

Tax Classes

Every product and customer is assigned to a tax class. Tax classes, in turn, are used to define tax rules. Tax rules are a combination of a customer tax class, product tax class, and tax rates. The two basic types of tax classes are:

- Product Tax Classes
- Customer Tax Classes

Product Tax Classes

Product tax classes can be created and assigned according to the tax requirements of the product. For example, food might not be taxed (or might be taxed at a different rate). If your store charges an additional tax on shipping, you should designate a separate product tax class for shipping.

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Product Tax Classes

To define a product tax class:

- 1. On the Admin menu, select **Sales > Tax > Product Tax Class**.
- 2. In the upper-right corner, click the **Add New** button.

Product Tax Class Information						
Class Name *						
	D		~1	T C		

Product Tax Class Information

3. Enter a **Class Name** for this tax class.

The new tax class now appears as a Tax Class option for product prices.

4. When complete, click the **Save Class** button.

Shipping Tax Class

A separate product class can be set up for shipping. Then, you must identify it in the configuration as the tax class used for shipping.

Step 1: Set Up a Product Tax Class for Shipping

- 1. On the Admin menu, select Sales > Tax > Product Tax Class.
- 2. In the upper-right corner, click the **Add New** button.
- 3. Enter a Class Name for the new tax class. For example, "Shipping."

Product Tax Class Information	
Class Name *	Shipping
	Duaduat Tan Class for Chinning

Product Tax Class for Shipping

4. When complete, click the **Save Class** button.

Step 2: Configure the Shipping Tax Class

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Tax**.
- 3. Click to expand the **Tax Classes** section.
- 4. Set **Tax Class for Shipping** to the class you created for shipping.

Tax Class for Shipping	Shipping 🔽	VEBSITE]

Shipping Tax Class

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Tax Class for Shipping	Website	Identifies the tax class used for shipping. Options include a list of all available tax classes:
		None

FIELD	SCOPE	DESCRIPTION
		Taxable Goods
		Shipping
		Tax Exempt

Customer Tax Classes

Customer tax classes are created and assigned by customer type. For example, in some jurisdictions, wholesale transactions are not taxed, although retail transactions are.

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Private Sales			
Relat Customer			
Wholesale Customer			

Customer Tax Classes

To define a customer tax class:

- 1. On the Admin menu, select **Sales > Tax > Customer Tax Classes**.
- 2. In the upper-right corner, click the **Add New** button.

Customer Tax Class Information	
Class Name *	

Customer Tax Class Information

3. Enter a **Class Name** for this tax class.

To link a customer tax class to a customer group, edit the customer group. You can then assign the customer group when creating or editing a customer.

4. When complete, click the **Save Class** button.

Tax Zones & 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 for which you collect and remit taxes. Because you give each tax zone and rate specification a unique identifier, you can have multiple tax rates for a given geographic area (for example, for places that do not tax food or medicine but tax other products).

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 actual tax based upon the tax configuration of the store.

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US-CT-Rate 1	United States	CR		
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US-FL-FRate 1	United States	PL	*	7
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US-IBL ^ Rate 2	United States	104	*	7.9
US-48-1-Rate 2	United States	10		
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US-NJ-1-Rate 1	United States	NJ -	*	1
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US-NY-1Rate 1	United States	N/r	*	8.3
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Manage Tax Zones & Rates

To define tax zones and rates:

- 1. On the Admin menu, select Sales > Tax > Manage Tax Zones & Rates.
- 2. In the upper-right corner, click the Add New Tax Rate button.

Tax Rate Information	
Tax Identifier *	
Country *	United States •
State	•
Zip/Post is Range	No
Zip/Post Code	*
	"" - matches any; 'xyz" - matches any that begins on 'xyz' and not longer than 10.
Rate Percent*	

Tax Rate Information

- **3.** In the Tax Rate Information section, do the following:
 - **a.** In the **Tax Identifier** field, enter a unique name for this tax. Do not use spaces. This identifier is not shown in the store if the Tax Titles section is completed, as described below.
 - **b.** Select the location of the **Country** and **State**. (Starting in EE 1.13.1, you can use the wildcard character * for State.)
 - **c.** Do one of the following:

- If you want the ZIP or postal code represented as an individual code, set **Zip/Post is Range**, to "No." Then, enter the **Zip/Post Code**.
- If you want the ZIP or postal code represented as a range, set **Zip/Post is Range** to "Yes." Then, enter the **Range From** and **Range To** values.

The wildcard character * can be used to represent all values. For example, 90* means all ZIP codes from 90000 through 90999.

- d. In the **Rate Percent** field, enter the percentage of tax.
- 4. In the **Tax Titles** section, enter a name of this tax for each store view.



Tax Titles

5. When complete, click the **Save Rate** button.

Importing and Exporting Tax Rates

If you have nexuses in several states and ship a large volume of product, you might consider downloading a tax rate by ZIP code data set. The rates can then be imported into Magento. In the following example, we import a set of California tax rates that was downloaded from the Avalara website. Avalara provides tax rate tables that can be downloaded at no charge for every ZIP code in the United States. Avalara is a Magento Technology Partner.

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US-CT-^-Rate 2		Product Tax	Classes	l	1	*	0.0			
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US-FL-^-Rate 2			United States		FL.	*	1			
US-FL-^-Rate 1			United States		n	*	7.6			
USHL-1-Rate 2			United States		8	•	6			
USHLA-Rate 1			United States		- L.		7			

Import / Export Tax Rates

Process Overview: Step 1: Export the Magento Tax Rate Data Step 2: Prepare the Import Data Step 3: Import the Tax Rates

Step 1: Export the Magento Tax Rate Data

- 1. On the Admin menu, select **Sales > Tax > Import / Export Tax Rates**.
- 2. Click the **Export Tax Rates** button. When prompted, click **Save**. Then, open the exported file in OpenOffice Calc.



Export Tax Rates

- **3.** In a second instance of OpenOffice Calc, open the new tax rate data, so you can see both, side by side. The basic Magento tax rate data includes the following columns:
 - Code
 - Country
 - State
 - Zip/Post Code
 - Rate

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1 Code	Country	State	Zp/Post Code	Rate	Zip/Post is Range	Range From	Range To	default	french	german			
US-All States-WholesaleTaxExemptRate	US		*	0.0000									
US-AI States-PrivateSalesShippingRate	US	•	*	4.9200									
US-All States-TaxableGoodsRate	US		2	8.2500								1	
US-CA-*-Rate 1	US	CA	*	9.0000									18
US-NY-*-Rate 1	US	NY		8.3750									
US-MA-*-Rate 1	US	MA	2	7.9500									1
US-FL-*Rate 1	US	FL.		7.8500									
US-MI-*-Rate 1	US US	MI	×	7.7480									
US-OH-*-Rate 1	US		1	5.5000									
1 US-NJ-*Rate 1	US	NJ	*	7.0000									
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Exported Tax Rate Data

4. In the new tax rate data, take note of any additional tax rate data that you might need to set up in your store before the data is imported. For example, the tax rate data for California also includes:

- TaxRegionName
- CombinedRate
- StateRate
- CountyRate
- CityRate
- SpecialRate

If you need to import additional tax zones and rates, you must first define them from the Admin of your store, and update the tax rules as needed. Then, export the data, and open the file in OpenOffice Calc, so it can be used for reference. However, to keep this example simple, we will import only the standard tax rate columns.

Step 2: Prepare the Import Data

You now have two spreadsheets open, side by side. One with the Magento export file structure, and the other with the new tax rate data that you want to import.

- 1. To create a place to work in the spreadsheet with the new data, insert as many blank columns at the far left as needed. Then, use cut and paste to rearrange the columns so they match the order of the Magento export data.
- 2. Rename the column headers to match the Magento export data.
- **3.** Delete any columns that have no data. Otherwise, the structure of the import file should match the original Magento export data.
- **4.** Before saving the file, scroll down and make sure that the tax rate columns contain only numeric data. Any text found in a tax rate column will prevent the data from being imported.
- **5.** Save the prepared data as a .CSV file. When prompted, verify that a comma is used a **Field delimiter**, and double quotes as the **Text delimiter**. Then, click **OK**.

Magento requires all text strings to be enclosed in double quotes. Because Microsoft Excel removes the double quotes, we recommend that you use OpenOffice Calc instead.

Step 3: Import the Tax Rates

- 1. On the Admin menu, select Sales > Tax > Import / Export Tax Rates.
- 2. Click the **Browse** button, and select the .CSV tax rate file that you prepared to import. Then, click the **Import Tax Rates** button.

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.



Import Tax Rates

3. On the Admin menu, select **Sales > Tax > Manage Tax Zones & Rates**. The new data appears in the list. Use the page controls to view the new tax rates.

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AINR	United States		CA	95361	0.0
LUIS	United States		CA	93475	0.0
AIN	United States		CA	95632	0.0
AGIU	United States		CA	94563	0.0
ANGELES	United States		CA	93599	0.0
AGQA	United States		CA	95521	0.0
A000	Linited States		CA	93654	0.0
RAFAEL	United States		CA	94915	0.00
RMERA	United States		CA	90662	0.00
AHVW	United States		CA	93960	0.0
ABR	United States		CA	95011	0.0
CAJON	United States		CA	92022	0.06
AJRZ	United States		CA	93223	0.0
CERRITO	United States		CA	94530	0.06
AJMX	United States		CA	95307	0.0
BRAGO	United States		ĊA	95437	0.00
ROBLES	United States		CA	93447	0.00
AGHS	Unded States		CA	95967	0.0
LEANDRO	United States		CA	94579	0.00

Imported Tax Rates

4. Run some text transactions in your store with customers from different ZIP codes to make sure that the new tax rates work correctly.

Cross-Border Price Consistency

Cross-border trade (also referred to as price consistency) supports European Union (EU) and other merchants who want to maintain consistent prices for customers whose tax rates are different than the store tax rate.

Merchants operating across regions and geographies can show their customers a single price. Pricing is clean and uncluttered regardless of tax structures and rates that vary from country to country.

To use cross-border price consistency, your store must include tax in product prices.

To enable cross-border price consistency:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Tax**.
- **3.** Click to expand the **Calculation Settings** section. To enable cross-border price consistency, set **Enable Cross Border Trade** to "Yes."

Important! If you enable cross-border trade your profit margin changes by tax rate. Profit is determined by the formula: (Revenue - CustomerVAT - CostOfGoodsSold).

4. When complete, click the **Save Config** button.

Tax Calculation Method Based On	Total	▼ [WEBSITE]
Tax Calculation Based On	Shipping Address	▼ [WEBSITE]
Catalog Prices	Excluding Tax	▼ [WEBSITE]
	Whether catalog prices entered by ad	min include tax.
Shipping Prices	Excluding Tax	▼ [WEBSITE]
	Whether shipping amounts entered by	admin or
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Apply Customer Tax		▼ [WEBSITE]
Apply Discount On Prices	Enable	▼ [WEBSITE]
	Cross Border	s calculated
	Trade ^{lax afte}	r Discount" is
l		
Apply Tax On	Cust ne if available	▼ [WEBSITE]
Enable Cross Border Trade	No	▼ [WEBSITE]
	When catalog price includes tax, enabled	le this setting will
	When catalog price includes tax, enabled	le this setting will

Enable Cross Border Trade Setting

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 Rules

Tax rules put all the taxation elements together: product tax classes, customer tax classes, and tax zones and rates. Each tax rule consists of a customer tax class, a product tax class, and a tax rate.

When numerous taxes must be defined, you can simplify the process by importing them from a spreadsheet. Select Sales > Tax > Import/Export Tax Rates.

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Retail Customer - Tavattle Good - Rate 1	Retail Customer, General, Members Only	Taxable Goods	US-CA-Rate 1, US-CT-Rate 1, US-RL-Rate 1, US-RL-Rate 1, US-IM-Rate 1, US-IM-Rate 1, US-IM-Rate 1, US-CH-Rate 1, US-CH-Rate 1, US-CH-Rate 1			×	* ()	0	
Wholesale Customer - Tax Evenut	Wholesale Customer	Tax Exempt	15-48. (Sales: Whates are Tail Second Rate			0	1	0	
Private Sales - Shipping Taxes	Private Sales	Sheping	US-48 States Private Dates StreppingRate			0	4	0	
Proute Sales - Tasable Goods - Rate 2	Private Sales	Taxathe Gooth	US-CA14ade 2, US-CT148ade 2, US-FL148ade 2, US-L148ade 2, US-84448ade 2, US-84448ade 2, US- NJ148ade 2, US-N1448ade 2, US-CH148ade 2, US-TL148ade 2			1	*	0	
NotLogovdin - Taxabie	NotLopped-m.	Taxable Goods	US-AR States-TaxableGoods/	Lafe			0		0

Manage Tax Rules

To define tax rules:

- 1. On the Admin menu, select Sales > Tax > Manage Tax Rules.
- 2. In the upper-right corner, click the Add New Tax Rule button. Then, do the following:

as Role Information		
Name*		
Customer Tax Olasa *	Retail Customer Wholecale Customer Genedi Members Drity Proute Sales Not Logged-in	
Product Tax Clase *	Taxable Goods Shipping Tax Exempt	
Tar Rate *	U-3-4 States Provide State Structure State U-3-6 States - Nation Concentrate U-3-6 States - Nation Concentrate U-3-6 States - Vincenzie Tatilism geflute U-3-6 - Vinte 1 U-3-7 - Vinte 1	
Priority*	0	
	 Tax rates at the same promy are added, others compounded. 	1.00
Calculate of autotal any	ii	
Burt Order*	0	

Tax Rule Information

- a. Enter a **Name** for the rule.
- **b.** Select a **Customer Tax Class**. To select multiple options, hold the Ctrl key down and click each item.
- c. Select a Product Tax Class.
- d. Select the Tax Rate.

This rule applies the tax rate to customers in the selected customer tax class and to products in the selected product tax class.

- e. In the **Priority** field, enter a number to indicate the priority of this tax, when more than one tax applies. If two tax rules with the same priority apply, then the taxes are added together. If two taxes with different priority settings apply, then the taxes are compounded.
- **3.** In the **Sort Order** field, enter a number to indicate the order in which tax rules are displayed on the Manage Tax Rules page.
- **4.** If you want taxes to be based on the order subtotal, select the **Calculate off Subtotal Only** checkbox.
- 5. When complete, click the **Save Rule** button.

FIELD	DESCRIPTION	
Name	Enter a name for this tax rule to make it easy to identify.	
Customer Tax Class	Select the customer tax class associated with this rule.	
Product Tax Class	Select the product tax class associated with this rule.	
Tax Rate	Select the tax rate that applies to this rule.	
Priority	Enter a number to indicate the priority of this tax, when more than one tax applies. Lower numbers have higher priority. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount.	
Calculate off Subtotal Only	Select this checkbox for taxes to be calculated based on the subtotal of the order. This means that for this tax rule, tax applies only to the subtotal of the order.	
Sort Order	Specify the order in which tax rules are displayed on the Manage Tax Rules page. Lower numbers have higher sort order in the list.	

Field Descriptions

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) 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 SETTIN	G 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	Item prices are shown without FPT, FPT amount, and with FPT included. 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	Item prices are shown without FPT, FPT amount, and with FPT included. FPT is included in tax-rule- based calculations.

FPT Display Prices

Fixed Product Tax Setup

The following instructions show how to set up a fixed product tax for your store. An "eco tax" is an example of how you might used FPT. 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 to accommodate the local requirements.

Process Overview: Step 1: Enable the FPT Tax Step 2: Create an FPT Attribute Step 3: Add the FPT to an Attribute Set Step 4: Apply the FPT to Products

Step 1: Enable the FPT Tax

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Sales, select **Tax**.
- **3.** Click to expand the **Fixed Product Taxes** section. Then, complete the fields as needed, using the Field Description section at the end of this section for reference.

Fixed Product Taxes		•
Enable FPT	Yes 🔻	[WEBSITE]
Display Prices In Product Lists	Including FPT only	[WEBSITE]
Display Prices On Product View Page	Including FPT only	[WEBSITE]
Display Prices In Sales Modules	Including FPT only	[WEBSITE]
Display Prices In Emails	Including FPT only	[WEBSITE]
Apply Discounts To FPT	No	[WEBSITE]
FPT Tax Configuration	Not Taxed 🔻	[WEBSITE]
Include FPT In Subtotal	No	[WEBSITE]

Fixed Product Tax

4. When complete, click the **Save Config** button.

Step 2: Create an FPT Attribute

- 1. On the Admin menu, select **Catalog > Attributes > Manage Attributes**.
- 2. In the upper-right corner, click the Add New Attribute button. Then, do the following:

Fixed Product Tax

- **a.** In the **Attribute Code** field, specify a unique identifier for this attribute. Do not use spaces or special characters. However, you can use hyphens or underscores. The maximum length is 30 characters.
- **b.** Set **Scope** to indicate where in your Magento installation the attribute will be available.
- c. Set Catalog Input Type for Store Owner to "Fixed Product Tax."

d. Set **Apply To** to one of the following:

All Product TypesMakes the FPT attribute available for all product types.Selected Product TypesIf you select this option, select each product type in the
list that will use the attribute.

3. In the panel on the left, select **Manage Label / Options**. Then, enter a label to identify the field. If you enter one label for the Admin, it will be used for the other views.

Admin English French German	Manage Titles (Size, Color, etc.)			
	Admin	English	French	German	

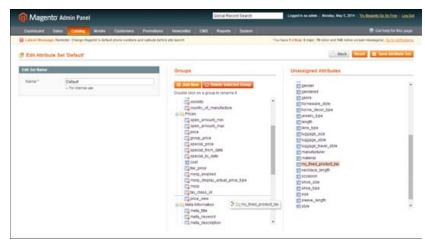
Manage Label / Options

4. When complete, click the **Save Attribute** button.

To learn more, see: Creating Attributes.

Step 3: Add the FPT Attribute to an Attribute Set

- 1. On the Admin menu, select Catalog > Attributes > Manage Attribute Sets.
- 2. Open the attribute set that needs the FPT attribute.
- **3.** Drag the FPT attribute from the list of Unassigned Attributes on the right to the Groups list. The group folders correspond to sections in the Product Information panel. You can place the attribute wherever you want it to appear.



Edit Attribute Set

4. When complete, click the **Save Attribute Set** button.

To learn more, see: Creating Attribute Sets.

Step 4: Apply the FPT to Products

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. Find the product that needs the FPT and open it in edit mode.
- **3.** In the product information, find the FPT field that you added to the attribute set. Then, do the following:

Price *	200.00 [USD]						foroev
Group Price	Website	Customer Group	Price	O Add Grow	Action		
Opecial Price	pusoj			12			(arosy
Special Price From Date	(****)	2					pweaso
Special Price To Date		2					pweeter
Tier Price	Website	Customer Group	Qty	Price	Action		
Apply MAP	Use config		•		<u> </u>		. Integr
Display Actual Price	Use config		•			FTP	pycasz
Manufacturer's Supposted Retail Price	[U SD]						ISLOBA
Tax Class *	Taxable Goods		•		4		DWEBER
FTP	Website	Country/State *	Tax*		Action		
	All Websites (U: •	Please Select- •			0		

Product Information with FPT Field

- 4. Click the Add Tax button. Then, do the following:
 - a. Select the **Country/State** where the FPT applies.
 - **b.** Enter the amount in the **Tax** field.
 - c. To add more FPT taxes, click the Add Tax button and repeat the process.
- 5. When complete, click the **Save** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enable FPT	Website	Determines if FPT is available. Options include: Yes / No
Display Prices in Product Lists	Website	Controls the display of FPT in product lists. Options include: Including FPT only Including FPT and FPT description Excluding FPT, FPT description, final price Excluding FPT

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION	
Display Price On Product view Page	Website	Options include: Including FPT only Including FPT and F	of FPT on the product page. PT description description, final price
Display Prices in Sales Modules	Website	and during checkout Including FPT only Including FPT and F	
Display Prices in Emails	Website	include: Including FPT only Including FPT and F	of FPT in email. Options PT description description, final price
Apply Discounts to FPT	Website	Determines if discou amount. Options inc	unts can be applied to the FPT lude: Yes / No
FPT Tax Configuration	Website	(Available in EE 1.13 FPT tax is calculate	3.1 and later) Determines how d. Options include:
		Not Taxed	Select this option if your taxing jurisdiction does not tax FPT. (For example,California.)
		Taxed	Select this option if your taxing jurisdiction does tax FPT. (For example, Canada.)
		Loaded and Displayed with Tax	Click this option if FPT is added to the order total before applying tax. (For example, EU countries.)

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIP	TION
Include FPT in Subtotal	Website		if FPT is included in the shopping cart ptions include:
		Yes	Includes FPT in the shopping cart subtotal.
		No	FPT is not included in the subtotal, and is placed after the subtotal in the shopping cart.

Compound Taxes

For compound taxes, the total cost of a product or service is taxed at one rate, and then the total of that amount, including the first tax amount, is taxed a second time. Compound tax is also known as stacked tax.

Compound taxes use different tax rule priorities. If two tax rules with the same priority apply then the taxes are added together. If two taxes with a different priority apply then the taxes are compounded. When taxes are compounded, the first priority tax is calculated on the subtotal amount, and then the second priority tax is calculated on the subtotal plus the first priority tax amount. Lower numbers have higher priority.

Important! In order for compound taxes to work correctly do not select the Calculate off subtotal only check box when you set up your tax rules that apply to compound taxes. This check box overrides the compounding calculation and cannot be used in conjunction with compound taxes.

Example 1: Regular Two-Tax Calculation

For example, in a regular tax calculation involving two tax rules, each rule is applied separately to the product subtotal, and the taxes are added together to calculate the total tax, which is then added to the product subtotal to calculate the grand total:

Regular Two-Tax Calculation

\$50.00	Product Price
+ \$50.00	Product Price
\$100.00	Subtotal
\$5.00	Subtotal x 1st tax rate 5%
+ \$10.00	Subtotal x 2nd tax rate 20%
\$15.00	Total Taxes
\$100.00	Subtotal
+ \$15.00	Total Taxes
\$115.00	Grand Total

Example 2: Compound Tax Calculation

With compound taxes, the first tax is added to the product subtotal, and the second tax is applied to that total:

Compound Tax Calculation

\$50.00	Product Price
+ \$50.00	Product Price
\$100.00	Subtotal
\$5.00	Subtotal x 1st tax rate 5%
+ \$10.50	[Subtotal + (Subtotal x 1st rate)] x 2nd tax rate: \$105 x 10%
\$15.50	Total Taxes
\$100.00	Subtotal
+ \$15.50	Total Taxes
\$115.50	Grand Total

To set up compound taxes:

- 1. Set up all the tax rates that will be used in your compound tax rule. See: Tax Zones & Rates.
- 2. Set up the first tax rule for compounding. For the first tax rule, be sure that you set a higher priority than you will set for the next tax rule, which will be compounded on top of this first tax rule. Lower numbers are used for higher priority. Use o for the highest priority. See: Tax Rules.
- **3.** Set up the second tax rule for compounding. For the second rule, be sure that you set a lower priority (use a higher number) than you set for the first tax rule.

Notes	



CHAPTER 53: 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.

This section provides a sample procedure for setting 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, 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 menu, select **Sales > Tax > Customer Tax Classes**.
- 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:

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:

VAT Standard	
Name:	VAT Standard
Customer Tax Class:	Retail Customer
Product Tax Class:	VAT Standard
Tax Rate:	VAT Standard Rate
VAT Reduced	
Name:	VAT Reduced
Customer Tax Class:	Retail Customer
Product Tax Class:	VAT Reduced
Tax Rate:	VAT Reduced Rate

3. Click the Save Rule button for each rate.

Step 5: Apply Tax Classes to Products

- 1. On the Admin menu, select **Catalog > Manage Products**.
- 2. Open a product from your catalog in edit mode.
- **3.** On the General page, find the **Tax Class** field. Then, select the **VAT Class** that applies to the product.
- 4. When complete, click the **Save** button.

VAT ID Validation

VAT ID Validation automatically calculates the required tax for B2B transactions that take place within the European Union (EU), based on the merchant and customer locale. Magento performs VAT ID validation using the web services of the European Commission server.

VAT-related tax rules do not influence other tax rules, and do not prevent the application of other tax rules. Only one tax rule can be applied at a given time.

- VAT is charged if the merchant and customer are located in the same EU country.
- VAT is not charged if the merchant and customer are located in different EU countries, and both parties are EU-registered business entities.

The store administrator creates more than one default customer group that can be automatically assigned to the customer during account creation, address creation or update, and checkout. The result is that different tax rules are used for intra-country (domestic) and intra-EU sales.

Important: If you sell virtual or downloadable products, which by their nature do not require shipping, the VAT rate of a customer's location country should be used for both intra-union and domestic sales. You must create additional individual tax rules for product tax classes that correspond to the virtual products.

Customer Registration Workflow

If VAT ID Validation is enabled, after registration each customer is prompted to enter the VAT ID number. However only those who are registered VAT customers are expected to complete the field.

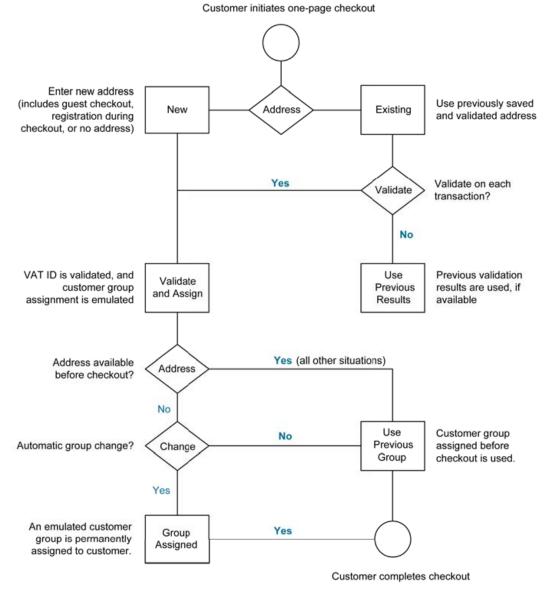
After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address, or changes the entire default address. In some cases, the group is temporarily changed during checkout by emulating a group change.

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 of 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. If a customer uses PayPal Express Checkout, Google

Express Checkout, or another external checkout method that uses an external payment gateway, the Validate on Each Transaction setting cannot be applied. Thus the customer group cannot be changed during checkout.



"One-Page" Checkout with VAT ID Validation

Setting Up VAT ID Validation

Use the following tax rule examples when setting up VAT ID Validation for your store.

Example: Minimal Tax Rules Required for VAT ID Validation

TAX RULE #1	
Customer Tax Class	Customer tax classes must include:
	A class for domestic customers
	A class for customers with invalid VAT ID
	A class for customers, for whom VAT ID validation failed
Product Tax Class	Product tax classes must include a class for products of all
	types, except bundle and virtual.
Tax Rate	The tax rate must include the VAT rate of the merchant's country.
TAX RULE #2	
Customer Tax Class	A class for intra-union customers.
Product Tax Class	A class for products of all types, except virtual.
Tax Rate	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%.
TAX RULE #3 (REQUIR	ED 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 (REQUIR	ED 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 be three entities:

- Customer Tax Classes
- Product Tax Classes
- Tax Rates

Create the tax rules that you need to use VAT ID Validation effectively.

- Tax rules include tax rates and tax classes.
- Tax classes are assigned to customer groups.

Step 3: Enable and Configure VAT ID Validation

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- 3. Set **Current Configuration Scope** to "Default Config," or the applicable store view.
- 4. Click to expand the **Create New Account Options** section.

- 5. Set **Enable Automatic Assignment to Customer Group** to "Yes." Then complete the fields as described below.
- 6. When complete, click the **Save Config** button.

ste New Account Options		
able Automatic Assignment to ustomer Group	Yes - To show VAT number on frontend, set Show VAT	ISTORE VENT
Tankow or only	Number on Frontend option to Ves.	
e Calculation Based On	Billing Address	 (store view)
Hault Group	General	 Intone rend
oup for Valid VAT ID - Domestic	- Please Select -	 IELONE AEMI
oup for Valid VAT ID - Intra- sion	- Please Select -	ISTORE VEWI
oup for invalid VAT ID	Please Select	 Ittoke view)
lidation Error Group	Please Select	 ELTORE VEW]
lidate on Each Transaction	No	 ISTORE VEW]
fault Value for Disable fomatic Group Changes Based I VAT ID	No	• IDC084C]
low VAT Number on Frontend	10	 Indestiti
fault Email Domain	example.com	Istore vew)
efault Welcome Email	New account (Default Template from Locale)	 Itsoer vewi
nall Sender	General Contact	 Istore vew)
equire Emails Confirmation	No	• [WEBSITE]
onfirmation Link Email	New account confirmation key (Default Templa	ETORE VEW)
and the second	New account confirmed (Default Template from	 ISTORE VEW)
elcome Email	. This email will be sent instead of default welcome	
ercome Elmail	email, after account confirmation.	

Create New Account Options

Step 4: Set Your VAT ID and Location Country

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under General, select **General**.
- 3. Set Current Configuration Scope to the applicable store view.
- 4. Click to expand the **Store Information** section. Then, do the following:

Store Information		٩
Store Name		[STORE VIEW]
Store Contact Telephone		[STORE VIEW]
Country	Please Select	[WEBSITE]
VAT Number		[WEBSITE]
	Validate VAT Number	
Store Contact Address		[STORE VIEW]

Store Information

- a. Select your **Country**.
- **b.** Enter your **VAT Number**. Then, click the **Validate VAT Number** button. The result appears immediately.
- 5. When complete, click the **Save Config** button.

Step 5: Verify the List of EU Member Countries

- **1.** On the Admin menu, select **System > Configuration**.
- 2. Set Current Configuration Scope to the applicable store view.
- **3.** Click to expand the **Countries Options** section.

Default Country	United States	 (STORE VEW) 	
Allow Countries	Alghanistan Aland Islands Algenis Angeris American Damoa Andorra Angella Angella Angella Antoua and Barbuda	[] [STORL VEW]	
Postal Code is Optional for the following countries	Guam Guatemata Guensay Guinea-Bissau Gurana-Bissau Gurana-Bissau Head Island and McDonald Islands Head Usland and McDonald Islands Hong Kong SAR Chima	JOLOBAL)	
European Union Countries	Andorra Angolla Angulta Antigus and Barbuda Argentina Argentina Arutsa Australia Australia	[] [orower]	

Countries Options

- **4.** In the **European Union Countries** list, verify that each member country of the EU is selected.
- 5. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION		
Enable Automatic Assignment to Customer Group	Store View	Determines if customers are automatically assigned to the default customer group. To show VAT number in the store, set Show VAT Number in the storefront, select "Yes." Options include:		
		auto VAT	system does not omatically validate customer FIDs nor does it change tomer groups.	
		and	system behavior is as usual, the default customer group be set in the Default Group I.	
Tax Calculation Based On	Store View	Choose whether VAT calculation will be based customer's shipping or billing address. If the customer does not have a shipping address (tha is, the customer has only now registered and th system does not yet take into account the customer's shipping address), the Default Tax Destination Calculation address is used for tax calculations that appear to the customer. Option include:		
		Billing Address	Calculates VAT based on the customer billing address.	
		Shipping Addres	s Calculates VAT based on the customer shipping address.	
		shipping addres	tax calculation is based on the s, and a customer purchases ucts, Magento uses the billing /AT calculation.	
Default Group	Store View	Identifies the defa	ault customer group.	
Group for Valid VAT ID - Domestic	Store View		ustomer group that is signed to customers from your e a valid VAT ID.	

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
Group for Valid VAT ID - Intra-Union	Store View	Determines the customer group that is automatically assigned to customers from other EU countries who have a valid VAT ID.
Group for Invalid VAT ID	Store View	Determines the customer group that is automatically assigned to customers who have an invalid VAT ID.
Validation Error Group	Store View	Determines the customer group that is automatically assigned to customers who failed VAT ID validation.
Validate on Each Transaction	Store View	Choose whether VAT ID validation will be performed each time during order creation even if a previously saved customer address with validated VAT ID is used. The option applies to one-page checkout in the storefront, only. If a new customer address is used (including guest checkout or if a customer has no address assigned to their account), then the validation is performed irrespective of this setting. During order creation in the Admin, no automatic validations are performed. Options include: Yes / No
Default Value for Disable Automatic Group Changes Based on VAT ID	Global	(Available only if Current Configuration Scope is set to "Default Group.") Choose whether the automatic change of customer group based on VAT ID will be enabled or disabled by default. The setting can be overridden on the product level. The setting influences the system behavior in the following situations:
		 The VAT ID of the customer's default address or the whole default address changes.
		 Customer group change was emulated during the checkout for a registered customer who had no previously saved address or for a customer, who registered during the checkout.
		If the automatic group change is enabled, then in the first case the customer group changes automatically, and in the second case the temporarily emulated customer group is assigned to customer.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
		If the automatic group change is disabled, the customer group that is assigned never changes, unless an administrator changes it manually.
Show VAT Number on Frontend	Website	Determines if the VAT number is visible to customers in the store. Options include: Yes / No
Default Email Domain	Store View	Identifies the default email domain.
Default Welcome Email	Store View	Identifies the email template used for the default Welcome email.
Email Sender	Store View	Identifies the store identity that appears as the sender of the Welcome email.
Require Emails Confirmation	Website	Determines if email messages require confirmation. Options include: Yes / No
Confirmation Link Email	Store View	Identifies the email template used for the confirmation email.
Welcome Email	Store View	Identifies the template used for the Welcome email that is sent after the account is confirmed.
Generate Human-Friendly Customer ID	Global	Choose whether the field for entering and storing the VAT ID number will be visible in the frontend. Options include: Yes / No

Managing VAT ID Validation

The customer group that is assigned to a customer for the validation results, might differ from the customer group that is currently assigned to the customer. The system displays suggested groups that the administrator can confirm or reject the current order. If the administrator confirms, the group change is emulated for the current order and the corresponding VAT rate is applied (if the corresponding tax rule is configured in the system). The actual customer group of a customer is not changed.

If a new customer account is added when an order is created, and an administrator confirms the customer group that corresponds to the VAT ID validation results, after the order is created, the customer account is saved in the system, and the customer group that was used to create the order is assigned to the customer.

If a customer fails VAT Validation, it is recommended that you apply the merchant's VAT rate for customers with invalid VAT IDs, and those for whom validation fails. You can create other tax rules that apply other tax rates according to your business logic.

Customer Address Workflow

When an administrator adds a new default address with a VAT ID to the account of a new or existing customer or changes the VAT ID of the existing default address, the system validates the VAT ID and assigns the appropriate customer group to the customer. The validation is performed after the Save or Save and Continue button is clicked.

The system behavior is as described when the VAT ID Validation functionality is enabled and configured.

If you want to disable the automatic change of a customer group, select the Disable automatic group change check box on the Account Information tab of the Customer Information page.

Order Creation Workflow

When an order is created from the Admin, VAT ID validation is not performed automatically. To validate the VAT ID of the customer address, an administrator must click the Validate VAT Number button in the Billing Address or Shipping Address section of the Create New Order page. After the validation, the administrator receives a pop-up notification of the validation results.

Wishind (2) Las municos - *	3	Thing Address		Shipping Address	
No llama		Select from existing custome late viti, Rome Steet, Rom		Select from existing custo Milo VIB, Rome Street, R Same As Billing Addre	ome, 00109, Rely .
		Profe		Prefs	
Last Onleved Nama (II)	-	FirstName*	Milo	FirstName*	Mis
No flema		Midde NameInitial		Middle Name/nital	
		Last fiame *	VIB	LastName*	1/m
		Suth		544	
		Company		Company	
Products in Comparison List (II)	4	Steel Address *	Rome Street	Steel Address *	Rome Street
No Rems					
		City *	Rome	cay.	Rome
		Country*	Raly *	Country*	taly •
		State/Province		State Province	
Recently Compared Products (2)	-	Zip/Postal Code *	Validate	Zo/Pratal Code*	Validate
No itema	-	Tatephone *	VAT Number	Telephone *	VAT Number
		Fat		Fat	
		VAT number	Values VAT Bander	VAT number	Valendade VALT Reserves
		Save in address book		Save in address book	

Validating Customer VAT ID at Order Creation

Automatic Customer Group Changes

When VAT ID Validation is enabled, the group that a customer is assigned to must be changed manually from the Admin. The system automatically and permanently changes a customer group in the following situations:

- The VAT ID of the customer's default address or the whole default address changes.
- The customer group change was emulated during the checkout for a registered customer who had no previously saved address, or for a customer who registered during checkout.

To set the default automatic group change behavior:

The configuration setting is made on the global level, and applies to new customers and those whose records are available in the system when VAT ID Validation is enabled for the first time.

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- 3. Click to expand the **Create New Account Options** section.
- 4. Set Default Value for Disable Automatic Group Changes Based on VAT ID as needed.
- 5. When complete, click the **Save Config** button.

To disable automatic group change for a customer:

- 1. On the Admin menu, select **Customers > Manage Customers**.
- **2.** Open the customer record in edit mode.

3. Just below the Group field, select the **Disable Automatic Group Change Based on VAT ID** checkbox.

Important! The setting does not influence the emulation of the customer group change during checkout.



Disabling Automatic Group Change on Customer Level

Notes	



CHAPTER 54: Tax Quick Reference

Configuration Options

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 Configurations.

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.

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 Configurations

U.S. Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	No, because FPT is not taxed.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	No
Apply Discount	Before tax
Comment	All tax zones are the same priority; ideally, a zone for state and one or more zones for zip code lookup.

U.K. B2C Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For merchants marking up supplier invoices (including VAT).

U.K. B2B Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT and description
Tax based on	Shipping address
Tax Calculation	On item

U.K. B2B Tax Configuration (cont.)

TAX OPTION	RECOMMENDED SETTING
Tax shipping?	Yes
Apply Discount	Before tax, discount on prices, including tax.
Comment	For B2B merchants to provide simpler VAT supply chain considerations. Tax calculation on row is also valid; however, check with your taxing jurisdiction. Setup assumes a merchant is in the supply chain and that goods sold are used by other vendors for VAT rebates and so on. This makes it easy to discern tax by item for faster rebate generation. Note that some jurisdictions require different rounding strategies not currently supported by Magento, and that not all jurisdictions allow item or row level tax.

Canada Tax Configuration

TAX OPTION	RECOMMENDED SETTING
Load catalog prices	Excluding tax
FPT	Yes, including FPT, description, and apply tax to FPT.
Tax based on	Shipping origin
Tax Calculation	On total
Tax shipping?	Yes
Apply Discount	Before tax
Comment	Merchants located in a GST/PST province (Montreal) should create one tax rule and show a combined tax amount.
	Be sure to consult a qualified tax authority if you have any questions. For information about the tax requirements of specific provinces, see the following:
	Revenu Québec
	Government of Saskatchewan
	Manitoba Information for Vendors

U.S. Tax Configuration Recommendations

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.

Canada: Example Tax Configuration

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)

Manage Tax Zones & Rates (cont.)

FIELD	RECOMMENDED SETTING
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

Tax Rule Information (cont.)

FIELD	RECOMMENDED SETTING
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 o and select the "Calculate off subtotal only" checkbox. Each tax appears as a separate line item, but the tax amounts are not compounded.

Tax Rule Information

FIELD	RECOMMENDED SETTING
Name	Retail-Canada-PST
Customer Tax Class	Retail Customer
Product Tax Class	Taxable Goods Shipping
Tax Rate	Canada-SK-PT
Priority	1
Calculate off subtotal only	Select this checkbox.
Sort Order	0

Step 6: Save and Test the Results

- 1. When complete, click the **Save Config** button.
- 2. Return to your storefront, and create a sample order to test the results.

E.U. Example Tax Configuration

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:	*		

Tax Rates (cont.)				
TAX RATE	SETTING			
	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

Tax Rules (cont.) TAX RULE	SETTING	
	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
	5	

Tax Rules (cont.)

Step 4: Set Up a Store View for Germany

- 1. In the upper-left corner of the Admin, click the **Manage Stores** link.
- 2. Under the default website, create a store view for **Germany**. Then, do the following:
 - a. On the Admin menu, select **System > Configuration**. In the upper-left corner, set **Default Config** to the French store.
 - **b.** On the General page, click to 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, set **Current Configuration Scope** to the German website. Then, do the folloiwng:
 - **a.** On the General page, click to 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	
Default State		
Default Postal Code	de * (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 menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Tax**. Then, do the following:
 - a. In the upper-right corner, set **Current Configuration Scope** to the German store.
 - **b.** To t he 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, select the **Use Website** checkbox. Then, set **Default Post Code** to "*."
- 3. When complete, click the **Save Config** button to save the settings.

Default Tax Destination Calculation		()
Default Country	United States •	[STORE VIEW]	
Default State	*	[STORE VIEW]	
Default Post Code	*	[STORE VIEW]	

Default Tax Destination Calculation

Warning Messages

Some combinations of tax-related options might cause customers to lose confidence in the purchase, and abandon their carts. In general, these conditions 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 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.



Shopping Cart Line Item that Includes and Excludes Tax

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 Web	
Please see source for more details. Click here to go to <u>Tax configuration</u> and change your settings.	lances this notification
Warning tax configuration can result in rounding errors for store(s): Europe Website(French), Europe Website(German). Please support of the store (s) and	ee source for more details Click here to go to
Tax configuration and change your settings.	lanore this notification

Calculation Settings

Some combinations of price settings display prices which both include and exclude tax. This mixed message can be confusing to customers, and trigger a warning. Use the following tables for reference when configuring tax calculation settings:

Tax Calculation Method: Excluding Tax

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Tax Class for Shipping	Shipping (is taxed)		
Excluding tax	OK	ОК	OK
Including tax	ОК	ОК	OK
Including and Excluding tax	OK	OK	Warning

Catalog Prices: Including Tax

PRICE DISPLAY	UNIT PRICE	ROW TOTAL	TOTAL
Excluding tax	OK	OK	OK
Including tax	ОК	OK	ОК
Including and Excluding tax	OK	Warning	Warning

Tax Calculation Method Based On	Total	٠	(wearstel
Tax Calculation Based On	Shipping Address	۳	DVGTR94123
Catalog Prices	Excluding Tax + Whether catalog prices enleced by admin include tax	•	(WEBSITE)
Shipping Prices	E-cluding Tax - Whether shipping ansacts entered by admit or obtained from gateways locked tax.		[weight]
Apply Customer Tax	After Discount	٠	(weiners)
Apply Discount On Prices	Excluding Tax • Apply descent or price including fac is calculated bened on store lax, if "Apply Tax after Decover" is benefied.	٣	PAGEWITE .
Apply Tax On	Custom price if available		pressates
Enable Cross Border Trade	No + When catalog poor includes tax, enable this setting to the poor no matter what the customer's tax rate		[wennie]

Calculation Settings

Discount Settings

We strongly recommend that you use the following settings to avoid issues when configuring taxes in relation to discounts.

Discount Settings

FIELD	RECOMMENDED	SETTING
Apply Customer Tax	After Discount	
Apply Discount on Prices	US and Canada	Excluding Tax
	EU	Including Tax
Calculation Settings		
Tax Catulation Method Based On	Total •	foematel
Tax Galculaton Based On	Shipping Address +	pwemsare;
Catacog Prices	Excluding Tax	
	Whether catalog prices entered by admin include tax	[WEBSITE]
Shipping Prices		bysinist formatist
	Whether calledg proces entered by admin include tax E-cluding Tax ViteRar shipping answers entered by admin or	
Ehoping Prices	Whether saturag process entered by advent include tax E-cluding Tax Wonther shipping annuarts settlened by advent or obtained from galaxies/s include tax.	(venue)
Shipping Prices	Minimer calling process extends by adverse include tax Ercloding Tax with inter-singlang excents extende by adverse or minimer drive galaxity is include tax After Discount e Eccluding Tax - Aggly discount can price including tax is calculated based or sites tax, 1 ² Aggly Tax after Discount	locanic)

Calculation Settings



Store Operations

In this section...

Currency Rates

Email Templates

Data Transfer

Reports

Permissions

Security



CHAPTER 55: Currency Rates

Magento Community Edition gives you the ability to accept currencies from more than two hundred countries around the world. When a store supports multiple currencies, a Currency Chooser appears in the header of every page after the rates are updated.

Magento'	C	1	L ACCOUNT TH CAR
Uningento		Currency	0
WOHEN MEN	ACCESSORES HOME & DECO	Chooser	

If you accept payment in multiple currencies, make sure to monitor the currency rate settings, because any fluctuation can affect 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.

Topics in this chapter include:

- Currency Rate Setup
- Currency Symbols
- Updating Currency Rates

Currency Setup

Before setting up individual currency rates, you must first specify which currencies you accept, and the currency used to display prices in your store.

Step 1: Choose the Currencies You Accept

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Currency Setup**.
- 3. Click to expand the **Currency Options** section. Then, 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 that you also select your primary currency. (To select multiple currencies, hold down the Ctrl key and click each option.)

arrancy Options			
Base Currency	US Dollar		(weesne)
	 Base currency is used for all online pays bransactions. Scope is defined by the ca scope ("Catalog" > "Price" > "Catalog Price" > "Catalog Pric	nent talog price	
Default Display Currency	US Dollar		[STORE VIEW]
Allowed Currencies	Tongan Paranga Trinidad and Tobago Dollar Tunisian Dinar Turksh Lira Turksmonistani Manat	_	ISTORE VIEWS
	Us Dolar Ugandan Shiling Ukrainian Hryvnia Unted Arab Emirates Dirham Uruguayan Peso	-	

Currency Options

- **4.** To define the scope of the base currency configuration, do the following:
 - **a.** In the panel on the left, under Catalog, select **Catalog**. Then, click to expand the **Price** section.
 - **b.** Set **Catalog Price Scope** to define the scope of the base currency configuration as either global, or limited to the website.

Price		۲
Catalog Price Scope	Global A Defines the base currency scope ("Currency Setup" > "Currency Options" > "Base Currency").	[GLOBAL]
	D :	

Price

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
CURRENCY OPTIONS		
Base Currency	Website	The primary currency used in store transactions.
Default Display Currency	Store View	The primary currency used to display prices.
Allowed Currencies	Store View	The currencies accepted by your store for payment.
PRICE		
Catalog Price Scope	Global	Determines the scope of the base currency. Options include: Global / Website.

Step 2: Configure the Import Connection

- 1. In the panel on the left under General, select **Currency Setup**.
- 2. Click to 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.

Vebservicex		(
Connection Timeout in Seconds	100	[GLOBAL]
	WebserviceX	

Step 3: Configure the Scheduled Import Settings

- 1. Continuing with Currency Setup, click to expand the Scheduled Import Settings section.
- 2. To automatically update currency rates, set **Enabled** to "Yes." Then, do the following:
 - a. Set **Service** to the rate provider. The default value is "Webservicex."
 - **b.** Set **Start Time** to the hour, minute, and second that the rates will be updated according to the schedule.
 - c. To determine how often the rates are updated, set **Frequency** to one of the following:
 - Daily
 - Weekly
 - Monthy

- **d**. In the **Error Email Recipient** field, enter the email address of the person who is to receive email notification if an error occurs during the import process. To enter multiple email addresses, separate each with a comma.
- **e.** Set **Error Email Sender** to the store contact that appears as the sender of the error notification.
- f. Set Error Email Template to the email template used for the error notification.
- **3**. When complete, click the **Save Config** button.

Scheduled Import Settings		٥
Enabled	No	[STORE VIEW]
Service	Webservicex	[STORE VIEW]
Start Time	00 \star : 00 \star : 00 \star	[STORE VIEW]
Frequency	Daily	[STORE VIEW]
Error Email Recipient		[STORE VIEW]
Error Email Sender	General Contact	[WEBSITE]
Error Email Template	Currency Update Warnings (Default Template frc	[WEBSITE]

Scheduled Import Settings

Field Descriptions

FIELD	SCOPE	DESCRIPTION
WEBSERVICEX		
Connection Timeout in Seconds	Global	Determines the number of seconds of inactivity before a Webservicex session times out. Default value: 100.
SCHEDULED IMPORT	SETTINGS	
Enabled	Store View	Determines if scheduled import is enabled.for the store. Options include: Yes / No
Service	Store View	Specifies the service that provides the data for the scheduled import. Default value: Webservicex.
Start Time	Store View	Indicates the start time by hour, minute, and second, based on a 24-hour clock.
Frequency	Store View	Determines how often the scheduled import takes place. Options include:
		Daily
		Weekly
		Monthly

FIELD	SCOPE	DESCRIPTION
Error Email Recipient	Store View	Identifies the email address of each person who is notified by email in the event of an error. For multiple recipients, separate each entry with a comma.
Error Email Sender	Website	Identifies the store contact that appears as the sender of the error email notification. Options include:
		General Contact
		Sales Representative
		Customer Support
		Custom Email 1
		Custom Email 2
Error Email Template	Website	Specifies the template that is used as the basis of the error email notification. Default template: Currency Update Warnings

Field Descriptions (cont.)

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.

1 Mage	nto [•] Ad	Admin Panel				Global Record Search		Logged in as admin Monday, April 6, 2015 Log Co	
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Manage C	urrency	Symbols Symbol							C Gave Converse Symbol
									C Line Standard
Currency	n Pesq)	Symbol*							

Manage Currency Symbols

To customize currency symbols:

1. On the Admin menu, select **System > Manage Currency > Symbols**.

Each enabled currency for your store appears in the Currency list.

- **2.** Enter a custom symbol for each currency you want to use, or select the **Use Standard** checkbox to the right of each currency.
- **3.** If you want to override the default symbol, clear the **Use Standard** checkbox. Then, enter the symbol you want to use.

It is not possible to change the alignment of the currency symbol from left to right.

4. When complete, click the **Save Currency Symbols** button.

Updating Currency Rates

Currency rates can be set manually, or be 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 Setup to specify the currencies that you accept, and to set up the import connection and schedule.

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		Rates			14.8	991	Import			1.0000	Reset	Seve Curr	use

Importing Currency Rates

To manually update a currency rate:

- 1. On the Admin menu, select **System > Manage Currency Rates**.
- 2. Click the rate you want to change, and type the new value.
- 3. When complete, click the Save Currency Rates button.

To import currency rates:

- 1. On the Admin menu, select **System > Manage Currency Rates**.
- 2. Set Import Service to the currency rate provider. WebserviceX is the default provider.
- **3.** Click the **Import** button.

The updated rates appear in the Manage Currency Rates list. If the rates have changed since the last update, the old rate appears below for reference.

4. When complete, click the **Save Currency Rates** button.

A message appears when the updated rates have been saved.

To import currency rates on schedule:

- **1.** Make sure that **Cron** is enabled for your store.
- **2.** Complete the Currency Setup to specify the currencies that you accept, and to set up the import connection and schedule.
- **3.** To verify that the rates are imported on schedule, check the Manage Currency Rates list. Then, wait for the duration of the frequency setting established for the schedule, and check the rates again.

Notes	



CHAPTER 56: Managing Email Templates

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

Topics in this chapter:

- Supported Email Clients
- Template Layout and Styles
- Preparing Your Email Logo
- Magento Upgrades
- Transactional Email Configuration
- Email Template Setup
- Customizing Email Templates
- Email Template Reference

Supported Email Clients

A wide range of technologies is supported by the various email clients and services available today. Although they do not all follow the same standards, and there is some variation in the way email messages are rendered, we have found the following services to be compatible with Magento Community Edition.

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

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.

Web Clients

Email Template Layout and Styles

Magento Community Edition has a set of responsive templates that define the header, body, and footer of all automated email messages that are sent from your store. The content, or body section, is combined with the header and footer to create each message. You can set up the header and footer one time, and then use them for every message.

Inline and Non-Inline Styles

Email templates are written in HTML, and are associated with the locale. The CSS files that provide the formatting instructions are stored separately, and reside on the server.

Many email clients do not support CSS formatting instructions that are stored separately from the email message. For this reason, the non inline styles variable has been added to the header of each message, to convert the external CSS styles to local, inline styles. The variable points to the CSS file on the server that provides the styles that are needed to format the template. The styles are then converted to inline styles, and copied to the <styles> tag of each message.

When you examine the header template code, you will find the markup tag with the non inline styles variable just after the <body> tag.

```
<body>
{{var non_inline_styles}}
<!-- Begin wrapper table -->
```

When customizing transactional email templates from the Admin, you can enter any additional CSS styles that you need directly into the Template Styles box. They will be included when the non inline styles are converted.

Preparing Your Email Logo

To ensure that your logo renders well on high-resolution devices, the uploaded image should be at least twice the size of the dimensions that are specified in the header template. Be careful to preserve the aspect ratio of the logo, so the height and width resize proportionally.



Logo with Transparent Background

Supported File Formats

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

Image Size

To make the most of the limited vertical space in the header, the logo should be cropped to eliminate any wasted space above or below the image. As a general rule, you can make an image smaller than the original, but not larger without losing resolution. If possible, the original artwork should be at least as large as the uploaded file. Taking a small image and doubling its size in a photo editor does not improve the resolution.

For example, in the default header template, the display dimensions of the logo are 168 pixels wide by 48 pixels high. To increase the resolution of the image, the image that is uploaded must be at least twice the size.

LOGO DIMENSIONS	1 X (DISPLAY SIZE)	2 X (IMAGE SIZE)	2.5 X (IMAGE SIZE)
Width:	168 px	336 px	420 px
Height:	48 px	96 px	120 px

If the original artwork was created as a vector, rather than a bitmap, it can be scaled up or down to the dimensions needed without losing resolution. The image can then be saved in one of the supported bitmap image formats. If the original logo artwork is a bitmap, the original should be at least twice the display size.

Magento Upgrades

If you have upgraded from an earlier version of Magento Community Edition, you can use an email client to view each transactional email template that is generated by your store. Verify that the logo, fonts, and styles render correctly. Email templates that were created with earlier versions of Magento do not have the non_inline_styles variable, and are not responsive. However, most can be used as they are.

To take advantage of the high-resolution display that is available on many devices, email logos are now uploaded at twice their display size. If you intend to use the responsive email templates, you should upload a higher resolution logo.

It is not necessary to reconfigure your email logo for use with custom templates that were created with earlier versions of Magento.

Updating Default Templates

Email templates are formatted with HTML and CSS, and can be easily edited. In addition, you can further customize the template by adding variables and widgets.

Many of the default email templates contain placeholder information that must be changed before any transactional email messages are sent to customers. When the template is ready to be used, make sure to update your system configuration, so the updated template will be used instead of the sample template.

Step 1: Choose a Default Template

- 1. On the Admin menu, select **System > Transactional Emails**.
- 2. Click the Add New Template button.
- 3. In the **Template** list, select a default template from the list of predefined templates.

oad default template			
Template *	New account	T	
Locale *	English (United States)	•	
	Load Template		

Load Default Template

- **4**. If necessary, set the **Locale** to the store language.
- 5. Click the Load Template button.

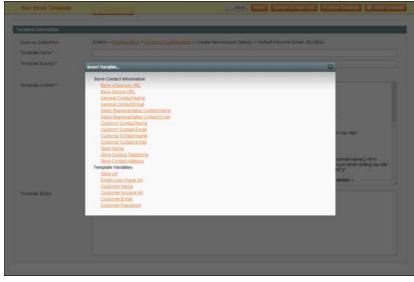
Used as Default For	System -> Configuration -> Customer Configuration -> Create New Account Options -> Default (Vetcome Email: (GLOBAL)
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Template Subject*	Welcome, ((var customer.name())
	Tensort Variable
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Template Information

The path to the configuration settings for each default template appears at the top of the Template Information section. Make note of this "Used as Default for" path, because you will later need to update the configuration with the name of the new template.

Step 2: Customize the Content

- **1.** In the Template Information section, do the following:
 - a. Enter a **Template Name** for the new email template.
 - **b.** In the **Template Subject** field, type the text to appear in the Subject header of the message.
 - c. Complete the **Template Content** as needed.
- 2. (Optional) To insert a variable, do the following:
 - a. Position the cursor in the text where you want the variable to appear.
 - **b.** Click the **Insert Variable** button.
 - **c.** In the list of available predefined variables, click the variable you want to insert into the template.



Insert Variable

- **3.** When complete, click the **Save Template** button.
- **4.** Make sure to **Preview** the template before associating it with a transactional email message that is sent to customers.

Step 3: Update Your Configuration

Before the template can be used, the configuration must be updated with the name of the new template. Refer to the path that you recorded in Step 1 when updating your configuration with the name of the new template.

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Sales, select **Sales Emails**.

To learn more, see: Configuring Email Templates.

Email Template Variables

Predefined Variables Store Contact Information Base Unsecure URL **Base Secure URL** General Contact Name General Contact Email Sales Representative Contact Name Sale Representative Contact Email Custom 1 Contact Name Custom 1 Contact Email Custom 2 Contact Name Custom 2 Contact Email Store Name Store Contact Telephone Store Contact Address **Template Variables** Store Url

- Email Logo Image Url
- Customer Name
- Customer Account Url Customer Email
- Customer Password

Custom Email Templates

Magento includes a default email template for the body section of each message that is sent by the system. Each template with the body content is combined with the header and footer templates to create the complete message. The content is formatted with HTML and CSS, and can be easily edited, and customized by adding variables and widgets.

The default templates already include your logo and store information and can be used as they are, without further customization. As a best practice, you should view each default email template and verify any changes you make before sending them to customers.

When a custom template is ready to be used, make sure to update your system configuration, so the custom template will be used instead of the default template. Email templates can be customized for each website, store, or store view. For detailed instructions, see the following topics:

- Header Template
- Footer Template
- Content Templates

Email Header

The default header includes your email logo that is linked to your store. You can easily insert variables to add store contact information to the header. To make more extensive changes requires a working knowledge of both HTML and CSS. On the server, the header template is located at:

[Magento install dir]/app/locale/en_US/template/email/html/header.

Process Overview:

Step 1: Load the Template

Step 2: Customize the Template

Step 3: Update the Configuration

Step 1: Load the Template

- 1. On the Admin menu, select **System > Transactional Emails**.
- 2. Click the Add New Template button. Then, do the following:
 - a. Set Template to "Email Header."
 - **b.** Set **Locale** to the language of the email recipients.
- 3. Click the Load Template button.

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Template Co	rdent *		New Invoice New Invoice to New Order New Order for New Shipmard	Quest					

Choosing the Email - Header Template

Step 2: Customize the Template

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

- 1. In the **Template Name** field, enter a name for your custom header.
- 2. In the **Template Content** box, modify the HTML as needed.

loed as Default For	System -> Cathouration -> Design -> Transactional Emails -> Email Header Template (OLOBAL)	
emplate Name *	Email - Custom Header	
emplate Subject*	Enal - Header	
	Briset Variable	
femplate Content *	HDOCTYPE Hale IPSULC 14VPC/IETD VATINL 10 StocktEN' Thtp://www.w3.org/TRiviterIGTDontemi-stock.dd* thetai antip- thetai antip- eneta htp-equive/Content-Type' content'/instituti characeus/51'/- meta htp-equive/Content-Type' content'/insti- tute antip- tute within 100% cellpadong-10' borders'0' tof*background stater'- * * * * * * * * * * * * *	
emplate Styles		

Template Information

3. To insert a variable, position the cursor in the code where you want the variable to appear, and click the **Insert Variable** button. Then, do the following:

a. In the list of Store Contact Information variables, click the variable that you want to insert.

You are not limited to the variables in this list, although they are the ones most often included in the header. You can actually type the code for any system variable directly into the template.

b. Click the **Preview Template** button. Then, make any adjustments to the template that are needed.

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emptate Subject*	Email - Header	
	Insert Variable	9
empliate Content*		
	Store Contact Information	
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	General Contact Name	
	General Contact Email	
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	Custom 1 Contact Name	
	Custom1 Contact Ernel Custom2 Contact Name	
	Custom2 Contact Ereal	
	Store Name	
	Illinn Contact Telephone Three Contact Address	

Insert Variable

4. When complete, click the **Save Template** button.

Your custom header now appears in the list of Transactional Email templates.

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Custom Header Template

Step 3: Update the Configuration

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Design**.
- **3.** If necessary, set the **Current Configuration Scope** to the website, store, or store view where the header will be used.
- 4. Click to expand the **Transactional Emails** section, and do the following:

- **a.** If the header is for a specific view, clear the **Use Website** checkbox that is next to the Email Header Template field.
- **b.** Set **Email Header Template** to the name of the custom header that you just created.

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Configuration	TML Head			0 0 0 0
GENERAL	iceder			0
General	ooter			0
Web	voduct image Watermarks			•
Design	legenation			•
Currency Setup	ransectional Emails			•
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+ CATALOG		is 2x normal size and the width/height fields below	m specify to dimensions in	
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Inventory	Logo Width	La construction de la constructi		Evd.
Google Sitemap		 Only secessary if image Enter number of pivels, v 		Clear
RSS Feeds	Logo Height		CONTRACTOR (0)	Checkbox
Email to a Friend	Logo megni	- Only necessary if image Enter number of picets, v		
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Newsletter		1		
Customer Configuration	Email Footer Template	Email - Footer (Delaut)	Template born Locale) •	
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Sales Emails				
PDF Print-outs				

Configuring a Custom Header for a Specific View

5. When complete, click the **Save Config** button.

Field Descriptions

FIELD	DESCRIPTION
LOAD DEFAULT TEM	IPLATE
Template	Lists the selection of available templates, and identifies the template to be customized.
Locale	Identifies the locale where the template is to be used.
TEMPLATE INFORM	ATION
Template Name	The name of your custom template.
Template Subject	(N/A) This field isn't used for header templates.

FIELD	DESCRIPTION
Template Content	The content of the template, in HTML.
Template Styles	(N/A) This field is not used for header templates.

Store Contact Information Variables

VARIABLE	MARKUP TAG
Base Unsecure URL	{{config path="web/unsecure/base_url"}}
Base Secure URL	{{config path="web/secure/base_url"}}
General Contact Name	{{config path="trans_email/ident_general/name"}}
General Contact Email	{{config path="trans_email/ident_general/email"}}
Sales Representative Contact Name	{{config path="trans_email/ident_sales/name"}}
Sales Representative Contact Email	{{config path="trans_email/ident_sales/email"}}
Custom1 Contact Name	{{config path="trans_email/ident_custom1/name"}}
Custom1 Contact Email	{{config path="trans_email/ident_custom1/email"}}
Custom2 Contact Name	{{config path="trans_email/ident_custom2/name"}}
Custom2 Contact Email	{{config path="trans_email/ident_custom2/email"}}
Store Name	{{config path="general/store_information/name"}}
Store Contact Telephone	{{config path="general/store_information/phone"}}
Store Contact Address	{{config path="general/store_information/address"}}

Email Footer

The 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. To make more extensive changes requires a working knowledge of both HTML and CSS. On the server, you will find the footer template in the following location:

[Magento install dir]/app/locale/en_US/template/email/html/header.html

Process Overview:

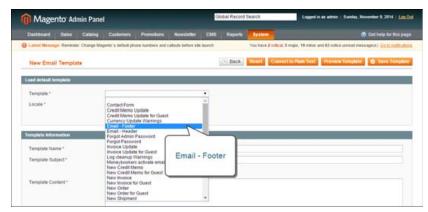
Step 1: Load the Template

Step 2: Customize the Template

Step 3: Update the Configuration

Step 1: Load the Template

- 1. On the Admin menu, select **System > Transactional Emails**.
- 2. Click the Add New Template button. Then, do the following:
 - a. Set Template to "Email Footer."
 - **b.** Set **Locale** to the language of the email recipients.
- 3. Click the **Load Template** button.

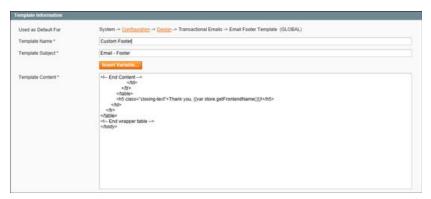


Choosing the Email - Footer Template

Step 2: Customize the Template

When working in the template code, be careful not to overwrite anything that is enclosed in double braces.

- 1. In the **Template Name** field, enter a name for your custom footer.
- 2. In the **Template Content** box, modify the HTML as needed.



Footer Template Information

- **3.** To insert a variable, position the cursor in the code where you want the variable to appear, and click the **Insert Variable** button. Then, do the following:
 - **a.** In the list of Store Contact Information variables, click the variable that you want to insert.
 - **b.** When you're done, click the **Preview Template** button to verity the code. Then, make any adjustments to the template that are needed.

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Ferriplishe Sudgest*	Email - Featur	
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Template Content *	Insert Variable	0
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Insert Variable

4. When the template is finalized, click the **Save Template** button.

Your custom footer now appears in the list of Transactional Email templates.

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					CMS Reports System			
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0		m	• berb		Date Updated From: 25	Selgert.	Template Type	setfiller Search
Page (Custo	m	• perp	Date Added		Subject	Template Type	set Filler Action
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Custom Footer Template

Step 3: Update the Configuration

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Design**.
- **3.** If necessary, set the **Current Configuration Scope** to the website, store, or store view where the header will be used.
- 4. Click to expand the **Transactional Emails** section, and do the following:
 - **a.** If the header is for a specific view, clear the **Use Website** checkbox that is next to the Email Footer Template field.
 - **b.** Set **Email Footer Template** to the name of the custom header that you just created.
- 5. When complete, click the **Save Config** button.

Email Body

The process of customizing the main body of each message is the same as the customizing the header or footer. The only difference is that there are many templates, listed in alphabetical order. You can use the templates as they are, or customize the most important messages first, such as messages related to customer accounts, and customer activities. For a complete list, see the Email Template Reference at the end of this section.

Process Overview: Step 1: Choose a Default Template Step 2: Customize the Content Step 3: Update the Configuration

Step 1: Choose a Default Template

- 1. On the Admin menu, select **System > Transactional Emails**.
- 2. Click the Add New Template button.
- 3. In the **Template** list, select a default template from the list of predefined templates.

New account	Ŧ		
English (United States)	¥		
Load Template			
	English (United States)	English (United States)	English (United States)

Load Default Template

- 4. If necessary, set the **Locale** to the store language.
- 5. Click the **Load Template** button.

The path to the configuration settings for each default template appears at the top of the Template Information section. You can click this link later when you are ready to update the configuration with the name of the new template.

Magento Admin Panel			Global Record Search		Logged in an admin Sunday, November 9, 2014 Lo	
Dashboard Sales	Cetalog Customers Promotions	Newsletter CMS	Reports	System	🕐 Get hetp tur Inis ;	
Latest Message: Remade	Change Magento's detault phone numbers and	calouts before site launch		You have 2 critical, 5 m	ajor, 19 minor and 63 notice unread message(s). Go to write	
New Email Templat	•		Back	Reset Converts	o Plain Text Proview Templetic 🧔 Same Temp	
Load detault template						
Template *	New account	•				
Locale *	English (United States)	•				
Template Information						
Used as Default For	Bystem Canifescabat Ca	Itomer Confestation -+ C	reate New Acco	unt Options Defaul	tWelcome Email (SLOBAL)	
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Template Subject*	Welcome. ((var customer nam	wild -				
	ament Variable_					
Template Content*	- To log in when you unter subtrementacion of "I'-M - po class - Triphighted - Use the tokowng val - stoong-Finase-infor- - cip- - cip-offen you log in to - sub- - cip-offen you log in to - sub- - sub- - sub - sub - sub - sub	classification of the second s	et="Sistere urt+" every page, an in: «bol» «bol» «boustomer pas able to do the fo ing a purchase	t then enter your ema sword)) lowing «/p»	-Lopp-ca- or -a hear Tabos II address and passood -(p-	
Template Shries						

Template Information

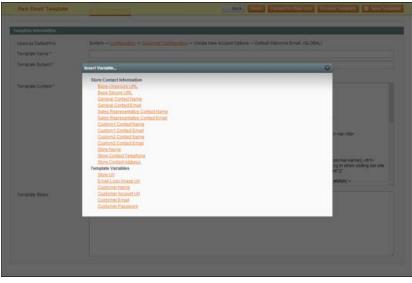
Step 2: Customize the Content

- **1.** In the Template Information section, do the following:
 - **a**. Enter a **Template Name** for the new email template.
 - **b.** In the **Template Subject** field, type the text that you want to appear in the Subject line of the message.
 - **c.** For a better view of the content and variables in the message, click the **Convert to Plain Text** button. When prompted to confirm, click **OK**.
 - d. To restore the HTML, click the **Return HTML Version** button.
 - e. Edit the **Template Content** as needed.
- **2**. (Optional) To insert a variable, do the following:
 - **a**. Position the cursor in the text where you want the variable to appear.
 - **b.** Click the **Insert Variable** button.

The list includes the standard Store Contact Information variables, and an additional list of variables that are specific to the template.

c. In the list of available variables, click the variable you want to insert into the template.

When a variable is selected, the markup tag that is associated with the variable is inserted at the cursor position in the code.



Insert Variable

- **3.** When complete, click the **Save Template** button.
- 4. Make sure to **Preview** the template code, and verify that the template is customer-ready.

Step 3: Update the Configuration

Before the template can be used, the configuration must be updated with the name of the new template. Do one of the following:

- Click the link at the top of the Template Information section to jump to the configuration settings for the template.
- On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Sales, select **Sales Emails**.

Email Template Configuration

The configuration for transactional email templates is designed to support multiple devices. The email logo that is uploaded is designed to render well on high-resolution displays. The configuration specifies the header and footer templates that are used for all transactional email messages sent within the scope of the configuration. To support the requirements of many email clients, a variable has been added that is used to convert external CSS styles to inline styles. The name of the external CSS file that it references is specified in the configuration.

Logo image	Browse	[STORE VIEW]	
	Delete Image		
	Allowed file types: jpg, jpeg, gif, png. To make logo		
	look good on high-resolution displays, upload an		
	image that is 2x normal size and then specify 1x		
	dimensions in width/height fields below		
Logo Image Alt		[STORE VIEW]	
		And a second second	
Logo Width	. Only necessary if image has been uploaded above	(STORE VIEW)	
	Enter number of pixels, without appending "pix".		
	Enter number of pixels, minious appending pix .		
Logo Height		[STORE VIEW]	
	» Only necessary if image has been uploaded above.		
	Enter number of pixels, without appending "px".		
Email Header Template	Email - Header (Default Template from Locale)	[STORE VIEW]	
Email Footer Template	Email - Footer (Default Template from Locale)	[STORE VIEW]	
Non-Inline CSS File(5)	email-non-inline.css	[STORE VIEW]	
	Comma-delimited list of files that will be included		
	inside <style> tag for all templates that include use the</td><td></td><td></td></tr><tr><td></td><td>'{{var non_inline_styles}}' variable. File path is relative to skin/trontend/PACKAGE/THEME/csa/</td><td></td><td></td></tr></tbody></table></style>		

Transactional Emails



Step 1: Upload Your Logo

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Design**.
- **3.** If needed, set **Current Configuration Scope** in the upper-left corner to the website, store, or store view where the configuration applies.
- 4. Click to expand the Transactional Emails section. Then, do the following:

- **a.** To upload your prepared **Logo Image**, click the **Browse** button. Find the file on your computer, and click to copy the path to the field.
- b. In the Logo Image Alt field, enter the alternate text to identify the image.

If you uploaded a logo image, 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: Select 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 should be used for each, according to the scope of the configuration.

- 1. Select the **Email Header Template** to be used for all transactional email messages.
- 2. Select the Email Footer Template to be used for all transactional email messages.

Step 3: Choose the CSS File(s)

In the **Non-inline CSS File(s)** field, enter the name of each CSS file that is needed to format the content of your transactional email messages. Separate the names of multiple files with a comma. On the server, the CSS files reside in the following location:

[magento install dir]/skin/frontend/[package]/[theme]/css/

FIELD	SCOPE	DESCRIPTION
Logo Image	Store View	Identifies the logo file that appears in the header of transactional email messages. To support high- resolution displays, upload an image that is twice the size that is needed. 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 200 pixels high and 400 pixels wide.
		To delete the current image and upload another, select the Delete Image checkbox. Then, browse to select the new image.
		Allowed file types:
		.jpg / .jpeg
		.gif
		.png

Field Descriptions

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
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.
Email Header Template	Store View	Select the template to be used for the header of all transactional email messages.
Email Footer Template	Store View	Select the template to be used for the footer of all transactional email messages.
Non-inline CSS File(s)	Store View	Because many mail clients do not support separate CSS files, Magento uses the non_inline_ styles variable to convert CSS styles to inline style declarations that reside in the <style> tag of the template.</td></tr><tr><td></td><td></td><td>The markup tag is enclosed in double braces, and includes a variable that contains the name of the external CSS file.</td></tr><tr><td></td><td></td><td>{{var non_inline_styles}}</td></tr><tr><td></td><td></td><td>The location of the CSS file on the server is relative to the following path:</td></tr><tr><td></td><td></td><td>skin/frontend/[package]/[theme]/css/</td></tr></tbody></table></style>

System Configuration Update

After creating a customized version of a template, remember to update your system configuration so the correct template is used for each message. You can access the template configuration from the System Configuration menu, or by clicking the link at the top of the template when open in edit mode.

Magento Admin Panel				Global Reco	ord Search	Lagged in as admin Sunday, November 9, 2014 Log Qu
Dastopart Sales Catalog		ns Newsleber			System	🕐 Get heip for this page
D Lateni Messape: Remarder, Charge Mag	ento's default phone numbers	and calcula before al	e innch		You have 2 critic	al, 5 major, 19 minor and 63 colors unread messagets). On to colification
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Design	Credit Memo					0 0 0 0
Currency Setup	Credit Memo Comm	ents				0
Store Email Addresses						
Contacts						
Reports						
Content Management						

Sales Email Configuration

Method 1: Link to Configuration

This method is convenient to use when you finish customizing a template. With the template open in edit mode, simply click the link at the top of the Template Information section to jump to the configuration settings for the template.

Used as Default For	System -+ Configuration -+ Clintomer Config	cation -> Create New Account Options -> Default Welcome Email (O	LOBAL)
Template Name *	New Account Welcome		
Template Subject *	Welcome, ([var customer name])!		
	Insert Variable	Link to	
Template Content *	((bemplate config_path="design/email/hea (()mineces file="email-inline.css"))	Configuration	1
	utin"customet/scount/"(">Ny Account-via- «p class="highlighted-text"> Use the following values when pit «ethong=Email-strong»: ((var cus «athong=Password-vistong»: ((htr vige)»	endbana(i) <h>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>></h>	eh-'Ostore ord «go

Link to Template Configuration Settings

Method 2: Navigate to the Configuration

Use this method if you have many customized templates that need to be added to the configuration.

Sales Email Templates

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Sales, select **Sales Emails**. Then, select the appropriate templates for each of the following sections:
 - Order and Order Comments
 - Invoice and Invoice Comments
 - Shipment and Shipment Comments
 - Credit Memo and Credit Memo Comments

Order		٩
Enabled	Yes •	[STORE VIEW]
New Order Confirmation Email Sender	Sales Representative •	[STORE VIEW]
New Order Confirmation Template	New Order (Default Template from Locale)	[STORE VIEW]
New Order Confirmation Template for Guest	New Order for Guest (Default Template from Lc 🔻	[STORE VIEW]
Send Order Email Copy To	▲ Comma-separated.	[STORE VIEW]
Send Order Email Copy Method	Bcc 🔻	[STORE VIEW]

Order Email Configuration

3. When complete, click the **Save Config** button.

Customer Email Templates

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Customer, select **Customer Configuration**. Then, select the appropriate templates for each of the following sections:
 - Create New Account Options
 - Password Options

assword Options		
Forgot Email Template	Forgot Password (Default Template from Local	ISTORE VIEW
Remind Email Template	Remind Password (Default Template from Loca	ISTORE VIEW
Forgot and Remind Email Sender	Customer Support	STORE MEM
Recovery Link Expiration Period	1	(eronvr)
(days)	+ Please enter a number 1 or greater in this field.	
Require admin user to change user password	Yes	IGLOBALI

Password Options

3. When complete, click the **Save Config** button.

Email Template Reference

Email Templates

Customer Account

- New Account
- New Account Confirmation Key
- New Account Confirmed
- Forgot Password
- Remind Password

Customer Activity

- Contact Form
- Send Product to a Friend
- Share Wishlist

Newsletters

- Newsletter Subscription Confirmation
- Newsletter Subscription Success
- Newsletter Unsubscription Success

Admin Activity

- Forgot Admin Password
- Currency Update Warnings
- Email Footer
- Email Header

System Notifications

- Log Cleanup Warnings
- Token Status Change
- Sitemap Generate Warnings

Product Alerts

- Product Alerts Cron Error
- Product Price Alert
- Product Stock Alert

Sales

- New Order
- New Order for Guest
- Order Update
- Order Update for Guest
- Payment Failed
- New Invoice
- New Invoice for Guest
- Invoice Update
- · Invoice Update for Guest
- New Shipment
- New Shipment for Guest
- Shipment Update
- Shipment Update for Guest
- New Credit Memo
- · New Credit Memo for Guest
- Credit Memo Update
- Credit Memo Update for Guest
- Moneybookers Activate Email

Notes		



CHAPTER 57: Managing Data Transfer

The Import/Export tool gives you the ability to manage multiple customer and product records in a single operation. If you have a large catalog of products, you will find it much easier to export the data, edit the data in a spreadsheet, and then import the data back into your store.

The CSV file format separates each data element by a comma, and is used as the standard for data exchange operations. All spreadsheet and database applications support the CSV file format. If you are working with a Mac, you should save the data in the CSV (Windows) format.

Topics in this chapter:

- Working with CSV Files
- Importing Data
- Exporting Data

Working with CSV Files

CSV files have a specific structure that must match the database. Each column heading must exactly match the Attribute Code of the attribute 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.

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.

Product CSV Structure

The catalog products CSV file contains information about products and the relationships between them. The table has the following structure:

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A.L		- x	ire.								
1.00		1	-b		P				A		
	ra nebai		type	category_ids	242	has options	name	mata title	meta description	inage	-
2 40	cont tanks	Cluthing	aimple	1	5.ms.000		French Cull Catton Twill Oxford			Im/a/maj000t_1.pg	-
2 40	tran Late	Clathing	aimple		5 mail01	100	OFvench Culf Catton Twill Oxford			/m/a/maj000t_1 pg	
4 40	min hase	Clathing	airrgfe	1 2	5 ma.002		Prench Cull Cotton Twill Owhed			/m/s/ms/000, 1 pg	
	irun base	Clathing	single		5-mad03		D Skin & Ookity Oxford Shirt			invisimis/003t 1.pg	1.5
6 23	Intel Base	Clothing	simple	1	5 mail004		5 Slim & Dobby Owland Shatt			invalmagotik 1 pg	
7 40	true have	Clathing	aimple		5 mag001		D Silver Rt Clobby Clubert Shut			im/s/ms/003t 1 pg	
8 40	tran bass	Clathing	aimple	18.27	ma.006		OPtied Cotton Shet			/m/a/maj008_1.pg	
	inin hase	Clathing	aimple	15.27	ma.007		Plad Cotton Shut			/m/s/mad08 2 pg	
	this base	Clathing	aimpie	15.27	ms,008		Plad Cotton Shirt			/m/s/ma/000: 3 pg	
11 40	imm base	Clothing	ample	14.40	ma.029		0 Sullivan Sport Coat			im/s/ms/00% 1 pg	
	man base	Clothing	ample	54.40	mid70		0 Sullivan Sport Coat			/m/s/maj0098_2.pg	*1
	H. Sheets		1000		allers,		A Print Prin				21
Seet 1.	11			Defail			10	Lord.		8 .	

Exported Product CSV in OpenOffice Calc

The first row of the table contains the names of the columns, there are two types of the names, as shown in the following table. Other rows contain attributes values, service data, and complex data. If a row contains the value in the SKU column, then this row the rows below it describe the product. Each new SKU value begins the description of the next product.

Each category is entered as a path, with a forward slash (/) between each level. For example: Furniture/Living Room. Do not include the Root Category in the path.

During import, if a row that contains the SKU value is found to be invalid, then the row, and all other rows with data for that product cannot be imported.

The minimal table that can be imported contains only the SKU column, which can be used to delete records from the database. There is no limit to the number of the columns he table can have. Columns without data are ignored during the import process.

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File: Ed	Il Search View Drooding Language Settings Macro Run Plugna titedes ?				
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		1.111 A 111 A 111 A 111 A 111 A			
10.60	et ji jostan av				
1 1	"store", "websites", "sttribute set", "type", "cstegory ids", "sku", "has options", "nam	e", "meta title", "meta descri	iption", "image", ";	mall image", "ti	tuntnell*
- 2	"admin", "mase", "Clothing", "simple", "15", "msj000", "0", "French Cuff Cotton Twill On	toss". "", "", "/m/s/mst000t 1.	100", "/m/s/ma1000	78.1.100","/m/a	M#10004
	"admin", "hase", "Clothing", "simple", "15", "maj001", "0", "French Cuff Cotton Twill Ca	food*, **, **, */m/s/msy000z 1.	10g*,*/m/s/maj000	t 1.jpg", */m/m	ma1000t
2.8	"admin", "hase", "Clothing", "simple", "15", "maj002", "0", "French Cuff Cotton Twill Ca				
1.5	"admin", "base", "Clothing", "simple", "15", "mej005", "0", "Slim fit Dokoy Oxford Solit	*,**,**,*/a/a/asj003t 1.1pg	.*/m/s/msj003t 1.	3pg*,*/s/s/ss3	1031 1.20
1.4	"admin", "Base", "Clothing", "simple", "15", "maj004", "0", "Slim fit Dobby Caford Shirt				
1.1	"admin", "base", "Clothing", "simple", "15", "msj000", "0", "Slim fit Dobby Caford Shirt				
	"admin", "Base", "Clothing", "simple", "15,27", "maydod", "0", "Fiald Cotton Shirt", "", "	*,*/m/s/ms1004t_1.3pg*,*/m/	/maj0041 1.300"."	/w/w/wwiddet 1	190", **.
1.2	"admin", "base", "Clothing", "simple", "15,27", "msj007", "1", "Fiald Cotton Shirt", "", "	", "/m/s/msj004t 2.jpg", "/m/s	/mm;006t_2.5pg*.*	/m/s/ns10001 2	100". **.
1.10	"admin", "Base", "Clothing", "aimple", "15,21", "mayOOO", "5", "Flaid Cotton Shirt", ""."				
11	"admin", "base", "Clothing", "simple", "14, 40", "msj000", "0", "Dillivan Sport Cost", "",	**,*/m/s/msj000t_1.jpg*,*/m	a/maj009t_1.jpg".	*/m/m/mm1009t_	1.200"."
3.2	"admin", "Mase", "Clothing", "simple", "14.40", "msj010", "0", "Sullivan Sport Coat", "",				
4					
	ert fie	LATE CHIES SHIE	Lees.	SANET	

Exported Product CSV in Notepad++

CSV Product Structure

COLUMN NAME	DESCRIPTION
_ <name></name>	The names of the service columns and complex data columns. Service columns contain entity properties, which are not attributes. For example, columns with website or product type information are service columns. The underscore as first character is used to distinguish these columns from the attribute column names.
<attribute name=""></attribute>	The names of the columns with values of both system-created attributes and attributes created by the store administrator.

Customer CSV Structure

The customers CSV file contains customer information from the database, and has the following structure:

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20	base	Jackdgexample.com	Wholesale		0	Jack		FRE		4le96cf8b888c 920e17264	150096940a2	cea45312	Bc51	
2	base	mark@example.com	Wholesale		0	Mark		Woodland		88+120569120802048593				18
45	base	rack@example.com	General		0	Rack .		Fax		375bc8231938d64638756	0449635616	664c6b63	19494	
5	base	maniym@example.com	General		¢	Marilyn		Morroe		Sb4b5238ab29436120586				15
6.	base	haven@example.com	VP Member		0	Haven		Bangor		0r1fbd9ac72h26bcaad44i				
1:	base	sligexample.com	VIP Member		0	JH .		Moorehouse		#09fe14370d5623130d83				
4	base	robert@example.com	General		0	Robert		Nga		0cf7655dddce1340955a4	1337/3426e6	ceasTebal	\$26c	
4 C	base	inedlexample.com	General		0.	Joe		Butler		193ce91ddb#525aaa1272	46a9e3d850	b0cdDe81	a916	13
1	base	chris@example.com	General		0	Chris		Fex		d0e166e1f7b04d45e732ei	37028+1c68	adbbe372	1600	12
11	base	mary@example.com	General		0	Mary		Hilary		55ae0fie9253c952013bc				
12	base	ram@example.com	General		0	Ram		Raa		M396677d5717a37fa3192			K53	
1.	111.9	hert1/	1	i.e				97		1 4 4 4 1 1 1 4 4 4 4 4 4 4 4 4 4 4 4 4			1	
See	11/1		Default				1970			5.01-0	10		- 0	100

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.

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ternal text file	kright : 20400 Kriss : 57	Loil Cell Sell	LADI	AV62 as UTP-8	246

Exported Customer CSV in Notepad++

CSV Customer Structure

COLUMN NAME	DESCRIPTION
_ <name></name>	The names of the service columns, and complex data columns. Service columns contain entity properties, which are not attributes. For example, columns with website or store information are service columns. The underscore as first character is used to distinguish these columns from the other attributes names.
	The "_address_default_billing" and the "_address_default_ shipping" columns are the default billing and shipping addresses flags. If the address in the row is the default billing and/or shipping address of the client, the "_address_default_billing" and/or "_address_default_shipping" columns in this row will have the "1" value.
<attribute name=""></attribute>	The names of the columns with values of both system-created attributes, and attributes created by the store administrator.

Importing Data

Data for all product types can be imported into the store, with the exception of bundle and downloadable products. In addition, you can import customer data, and product images. During the validation process, all items are verified, including:

- Attribute values according to data type (decimal, integer, varchar, text, datetime).
- Complex data, service data. and attributes with values that originate from a defined set (such as a drop-down or multiple select input type), are checked to ensure the values exist in the defined sets.
- For new entities, the presence of required attribute values in the file is checked. For existing entities, the presence of required attributes values is not checked, but if a required value is specified, it is validated according to the attribute type.

To import customer or product data:

1. On the Admin menu, select **System > Import/Export > Import**. Then, do the following:

Import Settings		
Entity Type *	Products	•
Import Behavior *	Append Complex Data	۲
Select File to Import*	Choose File No file chosen	

Import Settings

- a. Set Entity Type to one of the following:
 - Products
 - Customers
- **b.** Set **Import Behavior** to the way you want complex data to be managed if imported records already exist in the database.
 - Complex data for products includes categories, websites, custom options, tier prices, related products, up-sells, cross-sells, and associated products data.
 - Complex data for customers includes addresses.
- **c.** Choose one of the following options:

Append Complex Data	The new complex data will be added to the existing complex data for the existing entries in the database.
Replace Existing Complex Data	The existing complex data for the existing entities will be replaced.
Delete Entities	If entities that are imported already exist in the database, they will be deleted from the database.

- **d.** At the **Select File to Import** field, click the **Choose File** button. Then, select the CSV file that you have prepared for import.
- 2. Click the **Check Data** button in the upper-right corner of the page. The system validates the file. If the file is valid, the corresponding message and the Import button appear. If some of the rows in the imported file are not valid and cannot be imported, the corresponding information is included to the message, but you can proceed with importing. The invalid rows will be skipped.
- 3. If needed, make corrections to the CSV file.
- 4. Click the **Import button** to import the data into the database.

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, but the actual image files must be uploaded to the media/import directory on the server.

Magento maintains product images in a directory structure that is organized alphabetically. When you export product data to a CSV file, you can see the alphabetized path before the file name of each image. However, when you import images, you typically don't need to specify a path, because Magento can manage the directory structure automatically. Usually, the only thing you need to do is enter a forward slash before the file name of each image that is to be imported.

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 to Default Path

The easiest way to import product images is to use Dataflow, and let Magento manage the directory structure. For complete instructions, see Dataflow.

Method 2: Import Images to Specific Path

1. To import image files into a specific path, you must first create the required directory structure in the media/import folder. The import folder is located on the server in the following location:

[magento installation folder]/media/import

- **2.** Create the directory structure as follows:
 - a. Create the parent folder, named for the first character of the image file name.
 - **b.** Create a subfolder, named for the second character of the image file name. For example, the import path for filename.jpg would be as follows:

[magento installation folder]/media/import/f/i/filename.jpg

c. Set the following permissions for all image folders and files:

Image Folders: 0777

Image Files: 0666 (or greater)

On the server, change directories to the media/import folder, and enter the following from the command line:

```
find . -type d -exec chmod 777 {} \;
find . -type f -exec chmod 666 {} \;
```

- 3. In the CSV file, the image path and file name must be entered in the image, small_ image, and media_image columns for the correct SKU, according to image type. If you want, you can use the same image for each type.
 - **a.** In the appropriate column, enter the relative path to each image in the following format:

/f/i/filename.jpg

Important! Use only lowercase characters in the image path and filename of any image to be imported.

- **b.** Make sure that the correct SKU is entered on each row that has an image file.
- 4. Complete the standard process to import product 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.
- $\mathbf{\Sigma}$

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:

 \mathbf{V}

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.

Exporting Data

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.

All product types can be exported except gift cards.

To export customer or product data:

- 1. On the Admin menu, select **System > Import/Export > Export**.
- **2.** In the Export Settings section, specify the following:

Entity Type	Customers	•	
Export File Format	CSV		

Export Settings

- a. Set Entity Type to one of the following:
 - Customers
 - Products
- b. Accept the default Export File Format of "CSV."
- **3.** In the Entity Attributes section, you can include or exclude data to be exported according to the entity attribute values.
 - To include records with specific attribute values, set the required values of the attributes in the **Filter** column.
 - To omit an attribute from the export, select the **Skip** checkbox at the beginning of the row.

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Export Customers Based on Attribute Value

4. Scroll down and click the **Continue** button in the lower-right corner of the page. Look for the download prompt in the lower-right corner of your browser.

The CSV file that is generated can be edited and imported back into your store. Or, it can be used for mailing or other application.

Dataflow

Magento Dataflow is a data exchange framework that can be used by both merchants and developers. The basic Dataflow tool includes preconfigured profiles that make it easy to import and export product and customer data. The profiles can be used as they are, or be modified to meet your needs. You can create additional profiles for operations that are performed on a regular basis. For more sophisticated applications, Advanced Profiles can be defined in XML to perform custom data exchange operations.

The following instructions show how to use Dataflow profiles to export all product data, and import new product images.

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2	Export Product Stocks	Export	Products		Index Management	6		2013 2:12:50 AM	641
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Dataflow Profiles

Process Overview: Step 1: Export All Products Step 2: Copy the Product Images to the Server Step 3: Edit the CSV File Step 4: Import the Products Step 5: Update the Index

Step 1: Export All Products

- 1. Before you begin, make sure that all changes to the product data have been saved.
- 2. On the Admin menu, select System > Import/Export > Dataflow Profiles.
- **3**. In the list of profiles, select **Export All Products**.
- 4. In the panel on the left, click **Run Profile**.

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Run Profile

5. To begin the process, click the **Run Profile in Popup** button.

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Run Profile in Popup

6. Wait a few moments for the profile to begin execution. The length of time it takes to complete the process depends on the size of the database. Do not close the window.

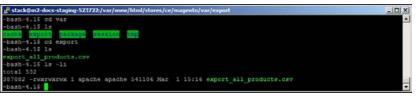
Ψ.	Starting profile execution, prease wait
	Warning: Please do not close the window during importingle-conting data
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0	Starting Mage_Catalog_Model_Convert_Panser_Product _ unpasse
0	Starting Mage_DataRoe_Model_Convert_Mapper_Column :: map
0	Starting Mage_Dataflow_Model_Convert_Parser_Cev :: unpares
0	Starting Mage, Dataftoe, Nodel_Convert_Adapter_to :: save
0	Saved successfully "export_all_products.csv"[541106.byte(s)]
-	Frished profile execution.

Profile Execution

7. When the process is complete, you can find the exported CSV file in the following location on the server:

[magento-install-dir]/var/export/export_all_products.csv

Here's how the exported data file looks from the command line of the server:



Exported CSV File from Command Line

8. Use an SFTP utility to download the **export_all_products.csv** file from the server to your desktop.

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Serport_all_products.cov	Parent directory 528 KB Microsoft Excel .	Seport_al_products.csv	
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Downloaded File

9. Then, open the file in any editor that supports UTF-8 encoding, such as Notepad++ or OpenOffice Calc. To open the CSV file in OpenOffice Calc, specify a comma as the separator, and double quotes as the text delimiter.

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Text Import Separator Options

The CSV data appears in the spreadsheet as rows of product records organized into columns of attributes, with the Attribute Code in the header of each column.

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Exported Product Data in OpenOffice Calc

Step 2: Copy the Product Images to the Server

The CSV file contains a path to each product image, but the actual image files must be uploaded to the server. To make the images available to import, place them in the media/import directory.

```
[magento-install-dir]/media/import
```

Use your SFTP utility to copy the product images that you want to import to the media/import folder.

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Copy Images to media/import Folder

Step 3: Edit the CSV File

- **1.** Edit the data as needed.
- 2. Save your changes to the CSV file.

For this example, we will add three new images to SKU #hdboo5. Because this is the only product record that we're going to update, the others can be deleted from the CSV file.

Currently, this product has only one image that is used for the base image, small image, and thumbnail. Because we're going to now offer this product in three colors, we need to upload an image for each color, and replace the image that's currently assigned to the product. Because this is a simple product, we can later use Custom Options to add an option for each color.

Magento creates a directory structure of product image files that is organized alphabetically. You can see that path before each image file name in the CSV data. However, when you import images, you must never include that path before the file name. The only thing you have to do is to enter a forward slash before the file name of each image that you want to import. Magento takes care of the rest. For this example, we need to add the three image files that were uploaded to the media/import folder.

```
/hdb005_HOTP_600.jpg
/hdb005_MARM
/hdb005_SALM_600.jpg
```

In the data, we will replace the original image file name, and add the other two image file references on separate blank lines. just below the original row. You must also enter the SKU on each additional line, to associate the images with the product.

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Update the CSV File with the Import Data

Step 4: Import the Products

- 1. On the Admin menu, select **System > Import/Export > Dataflow Profiles**.
- 2. In the list of profiles, select Import All Products.

This general-purpose profile that can be used to import or update any number or product records.

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Import All Products

3. In the panel on the left, select **Upload File**.

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mport/Export Profile	Import All Products		Back Result (2 Dir	ete Profile 👌 Save Profile 👌 Save and Continue Edit
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	Type	CSV / Tab separated	2	
	Value Delimiter	(1 for tel)	2.2	
	Enclose Values In:	* Warring Engl	ly value can cause problems with CS	IV format.
	Original Magento attribute names in first row:	Yes		

Upload File

- **4.** Because we're uploading only one file, click the **Browse** button for File 1. Then, find the file on your computer and click to select it. The path to the file appears in the input box.
- 5. Click the Save and Continue Edit button.

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	File 1 File 2 File 2	Cilline	rs/ccondra/Docum	Browse Browse				

Browse to Select Import File

- 6. In the panel on the left, select **Run Profile**.
- **7.** Select the CSV file that you edited. If there are several files in the list, make sure to select the right one. Then, click the **Run Profile in Popup** button.

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Run Profile

8. Wait a few moments for the profile to begin the import process. Do not close the window or interrupt the process. Look for the "Finished Profile Execution" message at the bottom of the list when the import process is complete. If you receive an error message, correct the problem in the CSV file, and try again.

Ŷ	Starting profile execution, please wat
۵	Warning: Please do not close the window during importing/exporting data
0	Starting Mage_Dataflow_Model_Convert_Parser_Cov : parse
0	Found 3 rews.
0	Starting catalogiconvert_adapter_product :: parke
0	Processed 100% 3/3 records
0	Imported 3 records
۵	Please wat while the indexes are being refreshed
Ŷ	Finaled profile execution.

Finished Profile Execution

Step 5: Update the Index

Usually the index needs to be updated after changes are made to product data. If you receive a message that the indexes are out of date, click the link and update the index.

Notes	
	_
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CHAPTER 58: Reports

Magento Community Edition provides a wide selection of reports to keep you current on everything from the contents of your customers' shopping carts to the tags they use. Report data can be viewed online or downloaded as a CSV or XML data file.

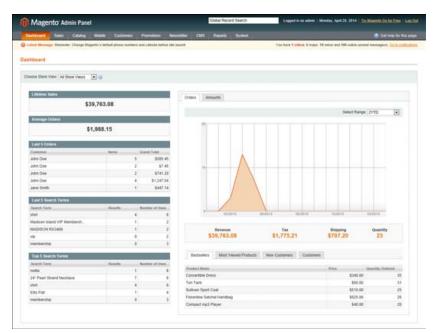
Your store's selection of reports includes:

- Dashboard
- Sales
- Shopping Cart
- Products
- Customers
- Tags
- Wishlists
- Reviews
- Newsletters
- Search Terms

Dashboard

The dashboard is usually the first page that appears when you log in to the Admin, and gives an overview of sales and customer activity. The blocks on the left provide a snapshot of lifetime sales, average order amount, the last five orders, and search terms. The graph depicts the orders and amounts for the selected date range. You can use the tabs above the graph to toggle between the two views.

Although by default, the dashboard is the startup page for the Admin, you can change the configuration to show 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.



Dashboard

Snapshot Reports

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.

Bestsellers

Lists your best-selling products, showing the price and quantity ordered.

Most Viewed Products

Lists the most recently viewed products and the number of times viewed.

New Customers

Lists recently registered customers.

Customers

Lists the customers who have ordered the most during the specified range of time.

Dashboard Setup

By default, the dashboard is the startup page for the Admin. However, if you prefer, 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.

To set the date range:

Set **Select Range** to one of the following:

- Last 24 Hours
- Last 7 Days
- Current Month
- YTD
- 2YTD

To set the starting dates:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under General, select **Reports**.
- 3. Click to expand the **Dashboard** section, do the following:
 - a. Set Year-To-Date Starts to the month and year that the current year began.
 - b. Set Current Month Starts to the current month.

Dashboard			٥
Year-To-Date Starts	January V 01 V	[GLOBAL]	
Current Month Starts		[GLOBAL]	
	Select day of the month.		

Dashboard

To change the Admin startup page:

- 1. On the Admin menu, select **System > Configuration**. Then in the panel on the left, under Advanced, select **Admin**.
- **2.** In the Admin UI section, set **Startup Page** to the page you want to first appear when you log in to the Admin.
- 3. Click the **Save Config** button to save the setting.



Startup Page

To turn off real-time data:

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. On the Admin menu, select **System > Configuration**. Then in the Configuration panel on the left, under Sales, select **Sales**.
- 2. Click to expand the Dashboard section. Then, set Use Aggregated Data (beta) to "Yes."

To disable charts:

1. On the Admin menu, select **System > Configuration**. Then in the Configuration panel on the left, under Advanced, select **Admin**.

Dashboard		٥
Enable Charts	Yes 🔻	[GLOBAL]
		_

Turn Off Dashboard Charts

- 2. In the Dashboard section, set Enable Charts to "No."
- **3.** When complete, click the **Save Config** button.

A message on the Dashboard indicates that the chart is now disabled.

Running Reports

Magento provides a variety of reports that you can access at any time. To see the reports that you can generate in Magento, from the Reports menu, select a type of report and then select a specific report of that type. Some report pages have filter controls that enable you to narrow the scope of the report. When you are finished making filter selections, click Show Report (or Refresh, in some reports) to generate the report.

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Reports Menu

To run the Orders report:

The Orders report includes real-time data, and can include orders of any status during a specific period of time.

- 1. On the Admin menu, select **Reports > Sales > Orders**. Then, do the following:
 - **a.** A message indicates the last time the report statistics were refreshed. If necessary, click the link to refresh the statistics.
 - **b.** Set **Show Report for** to the website, store, or store view that you want to include in the report.
 - c. Set Match Period To to one of the following:
 - Order Created Date
 - Order Updated Date
 - **d.** To determine how the report data is aggregated by row, set **Period** to one of the following:
 - Day
 - Month
 - Year
 - e. To include activity during a specific period, click the calendar icon 📰 and select the **From** and **To** dates.
 - f. To choose the orders that are included in the report, do one of the following:
 - To include all orders, set Order Status to "Any."
 - To include only orders with a specific status, set **Order Status** to "Specified." Then, select each order status that you want to include in the report.
 - g. To omit any empty rows from the report, set **Empty Rows** to "No."
 - h. To show actual, rather than projected values, set Show Actual Values to "Yes."
- 2. When ready to run the report, click the **Show Report** button.

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Orders Report by Month

To export report data:

- **1.** Set the **Export to** control to one of the following:
 - CSV
 - Excel XML
- **2.** Click the **Export** button. Then, look for the download file in the lower-left corner of your browser window.

Field Descriptions

FILTER CONTROL	DESCRIPTION
Show Report For	Determines the store view or website (or all websites) that are included in the report.
Match Period To	Determines how the records are selected to be included, based on either the order creation date or the order modified date. Options include:
	Order Created Date
	Order Updated Date
Period	Determines how report data is aggregated. Options include:
	Day
	Month
	Year

FILTER CONTROL	DESCRIPTION
From and To	Determines the start and end dates that are covered by the report.
Order Status	Determines the status of orders that are included in the report. Options include: Any / Specified.
Empty Rows	Determines if rows without data are included in the report. Options include: Yes / No.
Show Actual Values	Determines if report values reflect actual or projected values based on an estimate. Options include: Yes / No.

Refreshing Report Statistics

To reduce the performance impact of generating sales reports, Magento calculates and stores the required statistics for each report. When you generate a report, the report uses the stored statistics, rather than recalculating the statistics each time you generate a report. To include the most recent data, the sales report statistics must be refreshed. Refreshing the sales report statistics is a manual process.

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	Most Viewed Products Report		undefined	

Report Statistics

To refresh sales report statistics:

- 1. On the Admin menu, select **Reports > Refresh Statistics**.
- 2. In the list, select the checkbox of each report that needs 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, click the **Submit** button.

Available Reports

Report Descriptions

REPORT	DESCRIPTION
Sales Reports	
Total Ordered	Reports > Sales > Orders Shows orders for the specified time period.
Order Taxes	Reports > Sales > Tax Shows taxes charged for orders in the specified time period; grouped by tax rate.
Total Invoiced vs. Paid	Reports > Sales > Invoiced Shows amounts paid and unpaid for invoiced orders in the specified time period.
Total Shipped	Reports > Sales > Shipping Shows orders shipped in the specified time period, grouped by carrier/method; includes shipping charge amounts.
Total Refunded	Reports > Sales > Refunds Shows refunds applied to orders in the specified time period.
Coupons Usage	Reports > Sales > Coupons Shows coupons used for orders in the specified time period, grouped by coupon code.
PayPal Settlement	Reports > Sales > PayPal Settlement Reports Shows PayPal settlements for the specified time period. Click Fetch Updates to retrieve data from PayPal.
Shopping Cart Reports	
Products in Carts	Reports > Shopping Cart > Products in carts Shows products that are currently in shopping carts.
Abandoned Carts	Reports > Shopping Cart > Abandoned Carts Shows shopping carts that were started but then abandoned. Enables you to contact customers to offer incentives to turn an abandoned cart into a conversion.
Product Reports	
Products Bestsellers	Reports > Products > Bestsellers

Report Descriptions (cont.)

REPORT	DESCRIPTION
	Shows the products that were sold in the highest quantity in the specified time period.
Products Ordered	Reports > Products > Products Ordered Shows all products that were ordered in the specified time period.
Most Viewed	Reports > Products > Most Viewed Shows the products that were viewed the most times in the specified time period.
Low Stock	Reports > Products > Low Stock Shows the products whose stock levels are low.
Downloads	Reports > Products > Downloads Shows the number of purchases and downloads for each downloadable product.
Customer Reports	
New Accounts	Reports > Customers > New Accounts Shows the new accounts that were created during the specified time period.
Customers by Orders Total	Reports > Customers > Customers by orders total Shows the customers listed in descending order of total order amount.
Customers by Number of Orders	Reports > Customers > Customers by number of orders Shows the customers listed in descending order of number of orders placed.
Tag Reports	
Customers Tags	Reports > Tags > Customers Shows the customers listed with the number of tags each one has created.
Products Tags	Reports > Tags > Products Shows the number of unique tags and total number of tags created for each product.
Popular Tags	Reports > Tags > Popular Shows the number of times each tag has been applied.

REPORT	DESCRIPTION
Review Reports	
Customers Reviews	Reports > Reviews > Customers Reviews Shows the customers listed in descending order of number of reviews contributed.
Products Reviews	Reports > Reviews > Products Reviews Shows the products listed in descending order of number of reviews.
Search Term Report	
Search Terms	Reports > Search Terms Shows terms submitted with the search tool. If Hits are high, but the Results are low, you should review product names and descriptions so you can promote products related to the term.

Report Descriptions (cont.)



CHAPTER 59: Admin 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, with 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.

Topics in this chapter:

- New Users
- Custom Roles

Creating New Users

When your store is first installed, your login credentials have with 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 otherwise 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 a restricted role. 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 resources. Then, you can assign the role to a specific user account. Admin users assigned to a restricted role can see and change data only for websites or stores that are associated with the role. They cannot change any global settings or data.

Process Overview: Step 1: Create a New User Step 2: Assign the Role

Step 1: Create a New User

- 1. On the Admin menu, select **System > Permissions > Users**.
- 2. Click the Add New User button.
- **3.** In the Account Information section, do the following:

Account Information	
User Name *	
First Name *	
Last Name *	
Email *	
Password*	
Password Confirmation *	
This account is	Active

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.
- 4. Set This Account is to "Active."

Step 2: Assign the Role

1. In the User Information panel on the left, click **User Role**. Then, in the list of Roles, select **Administrators**. (Initially, it will be the only role available.)



Add New User Role

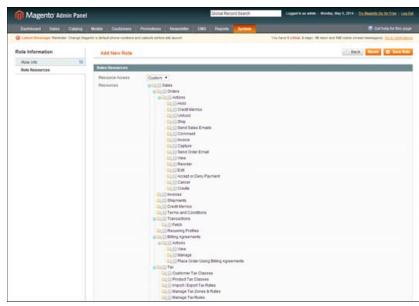
2. When complete, click the Save User button.

You now have two accounts with Administrator access.

Creating Custom Roles

To give someone restricted access, the first step is to create a role with the appropriate level of permissions. After the role is created, you will add the new user, set up the login credentials, and assign the role to the user account. After the role is established, you can create new Administrator users at any time, and assign the restricted role to grant limited access to the user.

For example, Admin permissions can be set to restrict access to tax resources, based on the business "need to know." To create an Admin role with access to tax settings, select both the Sales/Tax and System/Tax resources. If setting up a website for a region that differs from your default shipping point of origin, you must also allow access to the System/Shipping resources for the role, because the shipping settings determine the store tax rate used for catalog prices.



Role Resources

Process Overview: Step 1: Define the Role Step 2: Add the New User

Step 1: Define the Role

- 1. On the Admin menu, select **System > Permissions > Roles**. Then in the upper-left corner, click the **Add New Role** button.
- 2. In the Role Information section, enter a descriptive **Role Name**.

Role Information	
Role Name *	

Role Name

- **3.** In the panel on the left, select **Role Resources**.
- **4.** In the Roles Resources section, select the checkbox of each Admin **Resource** that you want to grant those with the role permission to access.

Important! Be sure to disable access to the Permissions tool if you are limiting access for a given role. Otherwise, users with this role will be able to modify their own restrictions.

Resource Access	Custom •	
Resources	Image: Sale Image: Sale <t< td=""><td></td></t<>	

Role Resources, Collapsed View

- **5.** (Optional) In the panel on the left, select **Role Users**. Then, assign additional Administrator user accounts to the new role.
- 6. When complete, click the **Save Role** button. The role now appears in the list of available roles

Step 2: Add the New User

- 1. On the Admin menu, select **System > Permissions > Users**.
- 2. Click the Add New User button.
- **3.** In the Account Information section, do the following:

Account Information	
User Name *	
First Name *	
Last Name *	
Email *	
Password *	
Password Confirmation *	
This account is	Active

Account Information

a. Assign a **User Name** to the 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
- c. Assign a **Password** to the account.

The password should be at least seven characters long, and include letters and numbers.

- **d.** In the **Password Confirmation** field, type the password again to make sure it was entered correctly.
- e. Set This Account is to "Active."
- **4.** In the User Information panel on the left, click **User Role**. Then, in the list of Roles, select the option for the role you want to assign to the new user.

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New User Role

5. When complete, click the **Save User** button.



CHAPTER 60: Security

In this chapter, you will learn how to manage Admin sessions and credentials, implement CAPTCHA, and manage website restrictions.

Topics include:

- Security Best Practices
- Security Configuration
- CAPTCHA
- Session Validation
- Browser Capabilities Detection

solution series: Magento 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.
- Use strong, long, 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.

Advanced Techniques

- Automate the deployment process, if possible, and use private keys for data transfer.
- Limit access to the Magento Admin by updating the whitelist with the IP address of each computer that is authorized to use the Admin and Magento Connect downloader. For examples of how to whitelist IP addresses, see: Secure Your Magento Admin.
- Do not install extensions directly on a production server.
 - To disable the Magento Connect downloader on the production site, either remove or block access to the /downloader directory. You can also use the same whitelisting methods.
- Use two-factor authorization for Admin logins. There are several extensions available that provide additional security by requiring an additional passcode that is generated on your phone, or a token from a special device.
- Review your server for "development leftovers." Make sure there are no accessible log files, publicly visible .git directories, tunnels to execute SQL helper scripts, 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.
- $\mathbf{\nabla}$
- Keep all software up to date, and apply patches as recommended.

Admin Desktop Environment

- Make sure that the computer that is used to access the Magento Admin is secure.
- Keep your antivirus software up to date, and use a malware scanner. Do not install any unknown programs, or click suspicious links.
- Use a strong password to log in to the computer, and change it periodically. Use a password manager such as LastPass, 1Password, or Dashlane to create and manage secure, unique passwords.
- Do not save FTP passwords in FTP programs, because they are often harvested by malware and used to infect servers.
- Delete user accounts for employees or contractors who no longer work with you. A large number of intrusions can be attributed to insider knowledge.

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.
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- 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.
- $\mathbf{\nabla}$
- 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. We'd like to thank the following people for contributing to this article:

- 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.

Security Configuration

The security settings give you the ability to control the lifetime of user sessions, and whether to allow your Magento store to run in a frame. (This setting can prevent clickjacking.) In addition you can add a secret key to URLs, and determine the case sensitivity of login credentials.

For security reasons Magento strongly recommends against running your store in a frame.

ogin is Case Sensitive	No	 IOLOBAL] 	
dd Secret Key to URLs	Yes	IOLOBALI	
Session Lifetime (seconds)	3600	(SLOBAL)	
	 Values less than 60 are ignored. Note that change apply after logout. 	will	
Allow Magento Backend to run in	Only from same domain	IGLOBAL)	
tane	 Enabling ability to run Magento in a frame is not recommended for security reasons. 		
Allow Magente Frontend to run in	Only from same domain	 JOLOBALI 	
tame	 Enabling ability to run Magento in a frame is not recommended for security reasons. 		

Security

To configure Admin security:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select Admin.
- 3. Click to expand the **Security** section, and complete the settings as needed.
- 4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Login Is Case Sensitive	Global	Options include: Yes / No
Add Secret Key to URLs	Global	Options include: Yes / No
Session Lifetime (seconds)	Global	Determines the length of a user session in seconds.
Allow Magento Backend to run in frame	Global	This option prevents "clickjacking" if you run your store in an iframe. Enabling the option causes the X-Frame-Options response header to be sent. Options include: Enabled/Only from same domain.

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
		For security reasons, it is recommended that this setting not be enabled.
Allow Magento Frontend to run in frame		
		For security reasons, it is recommended that this setting not be enabled.

CAPTCHA

CAPTCHA is an acronym for "Completely Automated Public Turing test to tell Computers and Humans Apart." A CAPTCHA is a visual device that ensures that a human being, rather than a computer, is interacting with the site. CAPTCHA can be used for both the Admin and customers.

Users can reload the CAPTCHA as many times as is necessary by clicking the Reload icon in the upper right corner of the image. The Magento CAPTCHA was implemented using a Zend Framework module, and is fully configurable.



CAPTCHA in Customer Login

Admin CAPTCHA

For an extra level of security, you can add a CAPTCHA to the Admin Login 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 not limited.

	Log in to Admin Pane	
	User Name:	Password:
-	admin	
	Please type the letters from the	image:
	echt	And a statistic to and
	Eorgol your password?	Login
-	Magento is a trademark	of Magento Inc. Copyright @ 2014 Magento Inc.

Admin CAPTCHA

To configure CAPTCHA for the Admin:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select Admin.
- 3. In the upper-right corner, set **Current Configuration Scope** to "Default."
- 4. Click to expand the CAPTCHA section, and complete the settings as described below.
- 5. When complete, click the **Save Config** button.

РТСНА		
nable CAPTCHA in Admin	Yes	[GLOBAL]
ont	LinLibertine	[GLOBAL]
orms	Admin Login Admin Forgot Password	[GLOBAL]
Displaying Mode	After number of attempts to login	[GLOBAL]
lumber of Unsuccessful Ittempts to Login	3 A If 0 is specified, CAPTCHA on the Login form will be always available.	[GLOBAL]
CAPTCHA Timeout (minutes)	7	[GLOBAL]
lumber of Symbols	4-5 ▲ Please specify 8 symbols at the most. Range allowed (e.g. 3-5)	[GLOBAL]
symbols Used in CAPTCHA	ABCDEFGHJKMnpqrstuvwxyz23456789	[GLOBAL]
	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. "", "T, "1") decrease	
	chance of correct recognition by customer.	

CAPTCHA Configuration

Customer CAPTCHA

CAPTCHA can be required to log in to a customer account, or be configured to appear after several unsuccessful attempts. It can also be used for other forms in the storefront.

АРТСНА		
Enable CAPTCHA on Frontend	Yes	[] [winers]
Fort	LinLibertine	Increased
Forms	Create user Login Propt passwort Checrost as Guest Register during Checlout	(wemutz)
	CAPTONA for "Create user" and "Forgot password" forms is always enabled if chosen	
Displaying Mode	After number of attempts to login	[willer]
Number of Unsuccessful Attempts to Login	3 = 11 0 is specified, CAPTCHA on the Login form will be always evaluable.] Inspect
CAPTCHA Timeout (minutes)	7	(WEBSITE)
Number of Symbols	4+5 . Please specify 8 symbols at the most. Range aboved (e.g. $2+5)$] (willight)
Symbols Used in CAPTCHA	ABCDEFGHURMinpgrstavway22456789 • Please use only latters (s2 or A-2) or numbers (0-9) this field. To spoces or other characters are allowed Similar location of a characters (s. 9, 7, 7, 17) dorsase character of correct recognition by cuatemer.	
Case Sensitive	No	Pressing Pressing

Customer CAPTCHA Configuration

To configure CAPTCHA for customers:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Customers, select **Customer Configuration**.
- **3.** Set **Current Configuration Scope** to the website where you want the configuration to apply.
- 4. Click to expand the **CAPTCHA** section, and complete the fields as described below.
- **5.** When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION			
Enable CAPTCHA on Frontend	Website	Enables the CAPTCHA in the storefront. Options include: Yes / No			
Font	Website	CAPTCHA. To add file in the same dire	that is used to display the your own font, put the font ctory as your Magento y it in the config.xml stored lage/Captcha/etc/		
Forms	Website	Determines the form used. Options inclue Create User Login Forgot Password Checkout as Guest Register during Che			
Displaying Mode	Website	Determines when the CAPTCHA appears. Options include:			
		Always	CAPTCHA is always required to log in.		
		After number of attempts to login	When selected displays the Number of Unsuccessful Attempts to Login field. Enter the number of login attempts allowed. A value of 0 (zero) is similar to setting Displaying Mode to Always. This option does not cover the Forgot Password and Create User forms. If CAPTCHA is enabled and set to be appear, then it is always included on these form.		

Field Descriptions (cont.)

FIELD	SCOPE	DESCRIPTION
		To track the number of unsuccessful attempts to log in, the attempts to log in under one email address from one IP-address are counted. The maximum allowed number of attempts to log in from one IP-address is 1,000. This limitation is only applied when the CAPTCHA functionality is enabled.
CAPTCHA Timeout (minutes)	Website	Determines the lifetime of the current CAPTCHA. When the CAPTCHA expires, the user must reload the page.
Number of Symbols	Website	Determines the number of symbols that are used in the CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, 5-8.
Symbols Used in CAPTCHA	Website	Determines which symbols are used in the CAPTCHA. Only letters (a-z and A-Z) and numbers (0-9) are allowed. The default set of symbols suggested in the field excludes similar looking symbols like i, I, or 1. Displaying these symbols in CAPTCHA decreases the chances that a user will recognize CAPTCHA correctly.
Case Sensitive	Website	Determines if the characters used in the CAPTCHA are case sensitive. Options include: Yes / No

Session Validation

Magento Community 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.

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 menu, select **System > Configuration**.
- 2. In the panel on the left under General, select **Web**.
- 3. Click to 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, click the **Save Config** button.

Session Validation Settings		٩
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 Frontend	Yes Allows customers to stay logged in when switching between different stores.	[WEBSITE]

Session Validation Settings

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Validate REMOTE_ADDR	Global	Verifies that the IP Address of a request matches \$_SESSION data. The session terminates if a different IP address is detected. Options include: Yes / No
Validate HTTP:VIA	Global	Verifies incoming proxy data. Checks that the proxy address of a request matches \$_SESSION data. The session terminates if a different proxy address is detected. Options include: Yes / No
Validate HTTP_x_ FORWARDED_FOR	Global	Verifies outgoing proxy data. Checks that the forwarded-for address of a request matches \$_ SESSION data. The session terminates if a different forwarded-for address is detected. Options include: Yes / No
Validate HTTP_USER_ AGENT	Global	USER_AGENT refers to the browser or device that is used to access the website. Verifies that the name and version of the browser, and operating system matches \$_SESSION data. The session terminates if a different user agent is detected from one request to another in the same session.Options include: Yes / No
Use SID on Frontend	Website	The session ID (SID) is a unique code added to storefront URLs to ensure that each user is attached to the correct session data. The SID also makes it possible for customers to stay logged in when switching stores. If using analytics, you must configure the program to filter the SID from URLs in order to get an accurate page visit report. Options include: Yes / No

Browser Capabilities Detection

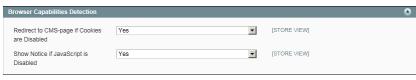
As is true of most websites and applications on the Internet, Magento requires that the visitor's browser allow both cookies and JavaScript for full operations. However, occasionally a user's browser might be set to the highest privacy setting which disallows both cookies and JavaScript. Your store can be configured to test the browser capabilities of each visitor, and to display a notice if the settings need to be changed.

- If the browser's privacy settings disallow cookies, you can configure the system to automatically redirect them to the "CMS No Cookies Page," which explains how to make the recommended settings with most browsers.
- If the browser's privacy settings disallow JavaScript, you can configure the system to display the following message above the header of every page:



To configure browser capabilities detection:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left under General, select **Web**.
- 3. Click to expand the **Browser Configuration Detection** section. Then, do the following:
 - **a.** If you want 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.** If you want to display a banner above the header when JavaScript is disabled in the user's browser, set **Show Notice if JavaScript is Disabled** to "Yes."



Browser Capabilities Detection

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Redirect to CMS-page if Cookies are Disabled	Store View	If cookies are disabled by the browser, redirects automatically to the "CMS No Cookies Page." Options include: Yes / No
Show Notice if JavaScript is Disabled	Store View	If JavaScript is disabled by the browser, displays a notice that prompts the user to enable JavaScript. To disable the message, select "No." Options include: Yes / No



System Operations

In this section...

Index Management

Cache Management

Alternate Media Storage

Magento Connect

Web Services

System Tools



CHAPTER 61: Index Management

Indexing is how Magento transforms data such as products, categories, and so on, to improve the performance of your web store. As data changes, the transformed data must be updated—or reindexed. Magento has very sophisticated architecture that stores merchant data (including catalog data, prices, users, stores, and so on) in many database tables. To optimize storefront performance, Magento accumulates data into special tables using indexers.

For example, suppose you change the price of an item from \$4.99 to \$3.99. Magento must reindex the price change to display it on your 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 would take a long time, possibly resulting in cart abandonment.

Topics in this chapter:

- Manual Reindexing
- Indexing Modes

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Index Management

To access Index Management:

- 1. On the Admin menu, select **System > Index Management**.
- **2.** Any indexer with a checkbox next to its name can be managed manually. The other indexers update automatically according to your Magento cron job. The default mode for each indexer is set in the system configuration.

Column Descriptions

COLUMN	DESCRIPTION				
Index	The name of the indexer.				
Description	A description of the indexer.				
Mode	Applies only to the indicated indexers are set to Update or required when a change is sa	n Sa	ve, which means a reindex is		
Status	Displays one of the following	:			
	Reindex Required		A change has been made that requires reindexing. If a checkbox and Reindex Required link appears, can be reindexed manually.		
	Ready		The index is up-to-date.		
	Scheduled	*	Reindexing is required but hasn't run yet according to your Magento cron job.		
	Running	*	Reindexing is required and is either running or in the queue.		
	Outdated	*	Indicates reindexing is required but there is an issue preventing it from running. If this state persists, submit a bug report.		

* Applies to automatic indexers only.

Column Descriptions (cont.)

COLUMN	DESCRIPTION
Update Required	Applies only to the indicated indexers. Indicates whether or not you must manually reindex. (The value in the Mode column indicates whether the indexer must be manually updated.)
Updated At	Displays the date and time an index was last manually updated, or Never if the index has never been manually updated.
Action	Indexers that require manual updating display a Reindex Data link. Click the link to reindex that option only.

Manual Reindexing

Indexers that require manual updates have a checkbox in the first column next to their name (Product Attributes, Tag Aggregation Data, and optionally, Catalog Search Index). The example below shows one index that requires a full reindex (Product Attributes), an index that requires a partial reindex (Catalog Search Index), and an index that is up-to-date (Tag Aggregation Data).

- If the Status column indicates "Reindex Required," and the Update Required column indicates "No," only a partial index is produced when you index manually.
- If the Status column indicates "Reindex Required," and the Update Required column indicates "Yes," a full index is produced when you index manually.

Index Management						
[abol 44,]	Visitier (constant liketier,), 8 haves satisfied				Adlene Reinder Data	· Summ
Andrea	Description	Mode	Stature	Applate Required	Updated At	Action
Product Attributes	Index product attributes for layered navigation building	Manual Update	REPORT REQUIRED	TER	Mar 25, 2013 11:10:51 AM	BenderDa
Calalog Search Index	Rebuild Catalog product fulfext search index	Update on Save	REPORT RECORDED	C NO	Mar 25, 2013 12:09:37 PM	Rathiles, Dat
Tap Appregation Data	Rebuild Tag apprepation data	Update on Save	MEANY D	C 10	Mar 25, 2013 11.11.00 AM	Ramiter Da

Index States

To reindex manually:

- 1. On the Admin menu, select **System > Index Management**.
- 2. Select the checkbox of each item to be reindexed.
- 3. Set Actions to "Reindex Data."
- **4.** Click the **Submit** button.

Automatic Indexing

Magento reindexes automatically whenever one or more items are changed (for example, price changes, catalog or shopping cart price rules are created, new categories added, and so on). Reindexing is performed as a background process; your store is accessible during all reindexing processes.

Indexing by Multiple Users

To avoid problems when multiple Admin users update objects that trigger automatic reindexing, set all indexers to run as cron jobs. Otherwise, every time an object is saved, any affected objects with interdependencies might cause a deadlock. Symptoms of a deadlock include high CPU usage and MySQL errors. As a best practice, schedule indexing as a cron job to prevent deadlocks from occurring.

Index Modes

The default mode for each indexer is specified in the system configuration. By default, indexers that require manual updating are set to "Update on Save," which means reindexing occurs after a change is made from the Admin. The other option is to manually reindex every time a change is made. (For example, if you change product attributes in the Admin, you must manually update the Product Attributes index.) If you ever need to override the default index mode, you can use the Action control.

Examples: 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. In a few cases, full reindexing must be performed manually.
Bulk loading of items in the following ways:	Partial reindex (only changed	At the frequency determined by your Magento cron job.
Magento import/export	items are reindexed)	
Direct SQL query	Tellidexed)	
 Any other method that directly adds, changes, or deletes data. 		

Index Actions (cont.)

ACTION	RESULT	TO CONTROL
Changing scope (for example, from global to website)	Partial reindex (only changed items are reindexed)	At the frequency determined by your Magento cron job.

To change the index mode:

- 1. On the Admin menu, select **System > Index Management**.
- 2. Select the checkbox of each indexer you want to change.
- 3. Set Actions to "Change Index Mode." Then, set Index Mode to one of the following:
 - Update on Save
 - Manual Update

Dashbeart Sales C	stalog Michie Castomers Pornations Headlette	CMS Reports	System		Change Index	Get help for this p
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					-	and the second
Americal & unamerical a American	(Sole) County Value (4 Area see cad		-A,50	Change Index		
bides .	Description	Mode	Status	Stadute Inquire	of Sydated At	al Lipdate
Product Attributes	Index product altributes for layered manipation building	Update on Dave	C BEACT	-	May 5, 2014 7 26 47 Ab	
the loss of the second s	Index product prices	Lipitate on Save	HIAN		May 5, 2014 7, 29 47 A	Bernies Data
Product Prices		Update an Save	MAR	A	Mar 5, 2014 7 29:47 A	e fierdes Data
Catalog URL Reartes	Inder product and calepories URL rewrites	CDING NO DAVE				
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Catalog URL Rearities					May 5, 2014 7 29 47 Ab	
Catalog URL Rearies	indexed category/products association	Update on Save	MARY		and a state of the second state of the	e Bernis, Data

Change Index Mode

4. Click the **Submit** button to apply the change to each selected indexer.

Events that Trigger Reindexing

Reindex Triggers

INDEX TYPE	REINDEXING EVENT
Product Prices	Add customer group. Change configuration settings.
Flat catalog ¹ product data	Add store. Add store group.

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 TYPE	REINDEXING EVENT
	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),

Reindex Triggers (cont.)

Events that Trigger a Full Reindex

Full Reindex Triggers

INDEXER	EVENT		
Catalog Category Flat Indexer	Create a new store.		
	Create a new store view.		
	Create, or delete an attribute that is any of the following:		
	Searchable or visible in advanced search		
	Filterable		
	Filterable in search		
	Used for sorting		
	Change an existing attribute to be any of the preceding. Enable flat category frontend options.		

Full Reindex Triggers (cont.)

INDEXER	EVENT		
Catalog Product Flat Indexer	Create a new store. Create a new store view. Create, or delete an attribute that is any of the following: • Searchable or visible in advanced search • Filterable • Filterable • Filterable in search • Used for sorting Change an existing attribute to be any of the preceding.		
Stock status indexer	Enable flat category frontene When the following Catalog system configuration: Stock Options: Product Stock Options:	Inventory options changes in the Display Out of Stock Products Manage Stock	
Price Indexer	Adding a new customer grou When any of the following C the system configuration: Stock Options: Product Stock Options: Price:	up. atalog Inventory options changes in Display Out of Stock Products Manage Stock Catalog Price Scope	
Category or Product Indexer	Create or delete a store view Delete a store. Delete a website.	Ι.	

Index Configuration

The default mode for each indexer is set in the system configuration. For most indexers, the default mode can be overridden from the Index Management page.

For example, to schedule the category flat catalog and the category flat product index using your Magento cron job and to immediately reindex everything else, choose the following options:

Category Flat Index:	Update when scheduled
Product Flat Index:	Update when scheduled
All other indexers:	Update on Save

To configure indexing options:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select Index Management.
- 3. Click to expand **Indexing Options**. Then, set each index to one of the following:

Update on Save	Immediately performs a partial reindex when an item changes.
Update When Scheduled	Updates the index according to your Magento cron job.

lex Options				
Catalog Category/Product Index	Update on Save	٣	[GLOBAL]	
Category URL Rewrite	Update on Save	•	[GLOBAL]	
Product URL Rewrite	Update on Save	•	[GLOBAL]	
Redirect URL Rewrite	Update on Save	¥	[GLOBAL]	
Category Flat Index	Update when scheduled	٣	[GLOBAL]	
Catalog Search Index	Update on Save	٣	[GLOBAL]	
Product Flat Index	Update when scheduled	•	[GLOBAL]	
Price and Stock Index	Update on Save	•	[GLOBAL]	

Index Options

4. When complete, click the **Save Config** button.

Configuration by Indexer Type

Indexer Type	Configurable?		
Catalog Category/Product Index	No	Configure only partial reindexing frequency.	
Category URL Rewrite	Yes	Also configure partial reindexing frequency.	

Indexer Type	Configu	Configurable?		
Product URL Rewrite	Yes	Also configure partial reindexing frequency.		
Redirect URL Rewrite	No	Configure only partial reindexing frequency.		
Category Flat Index	Yes	Also configure partial reindexing frequency.		
Product Flat Index	Yes	Also configure partial reindexing frequency.		
Price and Stock Index	No	Configure only partial reindexing frequency.		
Category Permissions	No	Category permissions indexing occurs automatically and is not configurable.		

Notes	



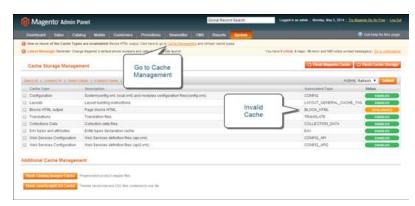
CHAPTER 62: Cache Storage

Using Magento's cache management system is an easy way to improve the performance of your site. The Cache Storage Management page shows the status of each primary cache and its associated tag. Whenever one of the caches needs to be refreshed, a notice appears at the top of the workspace to guide you through the process. There are separate buttons to flush the Magento-specific cache, and 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.

On the server, the default location for the primary Magento cache is var/cache. As an alternative to using the Cache Management tool, the contents of each cache can be manually deleted from the server.

Topics in this chapter:

- Clearing Caches
- External Full-Page Cache



Cache Storage Management

Clearing Caches

After clearing a cache, always refresh your browser to make sure that it uses the most recent files.

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Cache Storage 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 menu, select System > Cache Management.

The status of each cache that needs to be refreshed appears in yellow and marked, "Invalidated."

- **2.** Do one of the following:
 - For each cache that needs to be refreshed, click the checkbox at the beginning of the row.
 - To select a group, click one of the selection options above the list.
- **3.** Set **Actions** to "Refresh," and click the **Submit** button.

To flush the product image cache:

1. From the Cache Storage Management page, under Additional Cache Management, click the **Flush Catalog Images Cache** button.

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 the **Flush JavaScript/CSS Cache** button.

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.

Button Descriptions

COMMAND BUTTONS	DESCRIPTION
Flush Magento Cache	Removes all items in the default Magento cache (var/cache), according to their associated Magento tags.
Flush Cache Storage	Removes all items from the cache, regardless of Magento tag. If your system uses an alternate cache location, any cached files used by other applications are removed in the process.
Flush Catalog Images Cache	Removes all automatically resized and watermarked catalog images that are stored at: media/catalog/product/cache.
	If recently uploaded images aren't reflected in the catalog, try flushing the catalog and refreshing your browser.
Flush JavaScript/CSS Cache	Removes the merged copy of JavaScript and CSS files from the cache. If recent changes to the style sheet or JavaScript aren't reflected in the store, the fluching the lawaScript/CSS cache and
	reflected in the store, try flushing the JavaScript/CSS cache and refreshing your browser.

Cache Types

ТҮРЕ	DESCRIPTION	
Configuration	System and module configuration files. Associated tag: CONFIG	
	System:	config.xml
		local.xml
	Module:	config.xml
Layouts	Page layout building instructions.	
	Associated tag: LAYOUT_	GENERAL_CACHE_TAG
Blocks HTML Output	The HTML that is associat	ed with page blocks.

Cache Types (cont.)

ТҮРЕ	DESCRIPTION
	Associated tag: BLOCK_HTML
Translations	Language translation files. Associated tag: TRANSLATE
Collections Data	Files that contain data that is the result of a query. Associated tag: COLLECTION_DATA
EAV Types and Attributes	Attribute entities, types, and values. Associated tag: EAV
Web Services Configuration	Web Services definition files (api.xml) Associated tag: CONFIG_API
Web Services Configuration	Web Services definition files (api2.xml) Associated tag: CONFIG_API2

External Full-Page Cache

Full-page caching can improve response time and reduce the load on the server. Magento Community Edition supports the external Send Full Page Cache. To learn more, see Content Caching (Dynamic) on the Zend website.

To enable external caching:

- 1. On the Admin menu, select System > Configuration.
- 2. In the panel on the left, under Advanced, select System.
- 3. Click to expand the External Full Page Cache Settings section. Then, do the following:
 - a. Set Enable External Cache to "Yes."
 - b. Set External Cache Control to "Zend Full Page Cache."

External Full Page Cache Settings			٢
Enable External Cache	Yes	[GLOBAL]	
Cookie Lifetime (seconds)	3600	[GLOBAL]	
	If empty, default value will be used.		
External Cache Control	Zend Full Page Cache 🔻	[GLOBAL]	

External Full-Page Cache Settings

4. When complete, click the **Save Config** button.



CHAPTER 63: Alternate Media Storage

Magento Community Edition gives you the option to store media files in a database on a database server, or on a Content Delivery Network (CDN), as opposed to storing them on the file system of the web server. The advantage of using alternate storage is that it minimizes the effort required to synchronize media when multiple instances of the system that are deployed on different servers that need access to the same images, CSS files, and other media files.

Using CDN as alternate media storage is implemented as a self-support option only, and not as a full integration with a specific CDN. You must choose and configure the CDN on your own.

Topics in this chapter:

- Using a Database for Media Storage
- Using a Content Delivery Network

Media Storage Database Setup

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

When the customer opens the store page, its browser requests the HTML code and the media specified in the HTML code from the Magento system. The system searches the requested media in the file system and passes it to the browser, if it is found. If the system does not find the media in the file system, it requests the media from the database specified in the settings, places the media to the file system, and sends it to the customer's web browser.

To get the files from the database to the file system on the web server a PHP script is used. When the browser requests media from the web server, there are two alternatives for when a PHP script is run:

- If web server rewrites are enabled in the Magento system and supported by the server, the PHP script is run only when the requested media is not found in the web server file system.
- If web server rewrites are disabled in the Magento system or not supported by the server, the PHP script is run in any case, even when the required media exists in the file system of the web server.

To use a database for media storage:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select **System**.
- **3.** This configuration takes place at the global level, so set **Current Configuration Scope** to "Default Config."
- 4. Click to expand the **Storage Configuration for Media** section. Then, do the following:

Media Storage	Database	[GLOBAL]
inould otorago	Balababa	[
Select Media Database	default_setup 🔻	[GLOBAL]
	Synchronize	
	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.	
Environment Update Time	3600	[GLOBAL]

Storage Configuration for Media

- a. Set Media Storage to "Database."
- **b.** Set **Select Media Database** to the database you want to use.
- **c.** Click the **Synchronize** button to transfer the existing media to the newly selected database.
- d. Enter the Environment Update Time in seconds.
- 5. When complete, click the Save Config button.

Media Storage CDN Setup

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.

CDN Workflow

When a CDN is selected as media storage, all paths to media on the web store pages are changed to paths to the CDN. Retrieving media that is stored in a CDN works as follows:

- When a customer opens a page in the store, the browser addresses the CDN with the request to acquire some media files, such as images.
- If the CDN does not yet have these images in its storage, it requests them from the server, and provides images to the customer's browser.
- If the CDN already has the required images in storage, it simply serves the requested images to the customer's browser.

Important! When a CDN is used as media storage, JavaScript may not function properly if the CDN is not in your subdomain. This is a browser security feature.

To configure a content delivery network:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under General, select **Web**.

- **3.** Set the **Current Configuration Scope** as needed.
- 4. Click to expand the **Unsecure** section. Then, do the following:

ase URL	http://www.YourStore.com	Istoke view(
Base Link URL	((unsecure_base_unt))	ISTORE VIEW
Rase Skin URL	([unsecure_base_un])ekin/	(STORE VIEW)
Base Media URL	{{unsecure_base_urt}/media/	ISTORE VIEWS
Base JavaScript URL	{[unsecure_base_url]}s/	ISTORE MEM
	 Warning! When using CDH, in some cases JavaScript may not run property if CDN is not in your subdomain 	

Unsecure

- a. Change the value of the **Base Media URL**.
- b. Change the value of the **Base JavaScript URL**.
- **5.** Click to expand the **Secure** section.

Secure			•
Base URL	https://www.YourStore.com/	ISTORE VIEW	
	 Make sure that bese URL ends with 7 (slesh), e.g. http://yourdomain/magento/ 		
Base Link URL	((secure_base_un())	ISTORE VIEW	
	 Make sure that base URL ends with 7 (slash), e.g. http://yourdomain/maganto/ 		
Base Skin URL	(leecure_base_untilekon)	Istore, vew)	
Base Media URL	((secure_base_ur())media/	ISTORE VIEW	
Base JavaScript URL	((secure_base_ur())s/	ISTORE VIEWE	
	 Warning! When using CDN, in some cases JavaScrip may not run property if CDN is not in your subdomain 		
Use Secure URLs in Frontend	No	[STORE VIEW]	
Use Secure URLs in Admin	No	(DLOGAL)	
Officader header	SSL_OFFLOADED	(GLOBAL)	

Secure

- a. Change the value of the **Base Media URL**.
- **b.** Change the value of the **Base JavaScript URL**.
- 6. When complete, click the **Save Config** button.

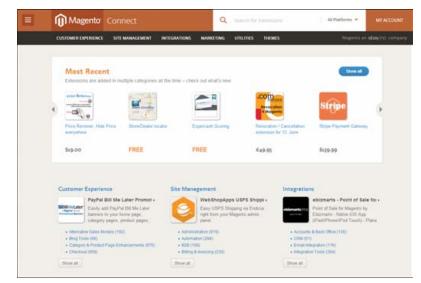


CHAPTER 64: Magento Connect

Magento Connect is the marketplace for Magento extensions. There are hundreds of extensions 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.

Topics in this chapter:

- Updating Magento Community Edition
- Installing Extensions



Magento Connect

Upgrading Magento

Magento Community Editionis constantly evolving. New features are added and problems resolved on an ongoing basis. From time to time you will be notified that a new Magento CE version is available. This notice will be published in the Magento blog, and in your Admin InBox.

Consider the following before upgrading your store:

- If the update is critical, contains mandatory updates, or resolves issues that you have encountered, you should update your store.
- If your store has a custom theme, you will benefit from the bug fixes in the update, but new the functionality might not be implemented in your theme.
- Upgrading between major versions, such as between version 1.1 and 1.2, might require minor configuration changes. See the update release notes for more information.
- We strongly recommend that you test all updates in a staging environment before upgrading a live store.

To update your store to a new version:

- 1. On the Admin menu, select **System > Magento Connect > Magento Connect Manager**.
- 2. Enter your Admin username and password, and click the **Log In** button.
- **3.** Click the **Check for Upgrades** button. Any upgrades available for Magento CE modules are marked in yellow.
- **4.** In the Actions column, select the upgrades to be installed. Then, click the **Commit Changes** button.
- 5. When the installation is complete, click the **Return to Admin** link in the header.

Congratulations! You have upgraded Magento Community Edition. Now check your site to make sure everything works as expected.

Installing Extensions

Many extensions and themes are available on Magento Connect, and the installation process varies for each. Some extensions require additional configuration after the installation. For complete installation and configuration instructions, see the documentation provided by the extension developer. The following instructions outline the general process. Before installing any extension, always back up your store.

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	Log In Place are sone you Vagenta Administrator Generators On your administrators and the administrator to gene Username Passesses Username Passesses Username Userna
	. Neg Va to Kaup Wagenti Healthy - <u>Showed Ad Theon</u> (Propertic Convect Manager vor. 115.1.8) Magente is a triadment al filagente, No. Copyright B 2013 Higherts No.

Log In to Magento Connect Manager

To back up your store:

- 1. On the Admin menu, select System > Magento Connect > Magento Connect Manager.
- 2. Select the **Create Backup** checkbox and select the backup type.

The backup is created automatically, and listed under System > Tools > Backups.

To install an extension:

- 1. Go to Magento Connect.
- **2.** Use the filters to browse through the available extensions.
- 3. On the page of the extension you want to install, do the following:
 - **a.** If the extension is available for sale, click the **Get Extension** button. Then, follow the prompts to purchase the extension.
 - **b.** Click the **Get Extension Key** key button.
 - **c.** Click the link to read the license agreement, and if you agree to the terms, select the checkbox.

An extension key similar to this appears: magento-core/Mage_xxxx. The key is a special link that Magento needs to install the extension to your store.

- d. Click **Select** to select the key, and press **Ctrl + C** to copy it to the clipboard.
- 4. Log in to your store Admin, and do the following:
 - a. On the Admin menu, select System > Magento Connect > Magento Connect Manager.
 - **b.** When prompted, enter your Admin **User Name** and **Password**. Then, click the **Log In** button.
 - c. In the Install New Extensions section, paste the **Extension Key**.
 - d. Click the **Install** button and wait for the installation to complete.
- 5. You can now return to your store Admin and use the extension.

Look for new options in the related section of the Admin. For example, payment extensions appear in System > Configuration > Sales > Payment Methods.



CHAPTER 65: Web Services

Web services share information across networks using standards-based technologies. Information from your store can be shared with other Web-based services to help create a more integrated set of tools for your business.

Web services retrieve information from your store using an application programming interface, the Magento Core API. The Magento Core API includes all the parameters for data requests that other web services need to access information from your store.

Topics in this chapter:

- Magento Core API Settings
- Activating Web Services
- Rest Roles

Magento Core API Settings

The Magento Core API supports both SOAP and XML RPC protocols. The API is permission-based, and allows access to the Customer, Catalog, and Order modules of your store.

The WSDL (Web Services Description Language) definition that you create for your Magento Community Edition API solution is WS-I compliant by default. This makes it possible to use tools that require a WS-I complaint WSDL definition for API integration. No additional settings are required. By default, the API default character set is UTF-8, and the timeout for client sessions is 3600 seconds. You can change the default settings through the system configuration of the store. Use the following endpoint URL for all WSI-I APIs, and replace {site_url} with the store domain:

WS-I Endpoint URL

http://{site_url}/api/wsi_soap/?wsdl

To change the general settings:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the Configuration panel on the left, under Services, select **Magento Core API**. Then, click to expand the **General Settings** section. Then, do the following:

General Settings		٥
Default Response Charset	UTF-8	[STORE VIEW]
Client Session Timeout (sec.)	3600	[STORE VIEW]
WS-I Compliance	Yes 🔻	[STORE VIEW]
Enable WSDL Cache	Yes 🔻	[STORE VIEW]

Magento Core API General Settings

- a. Enter the name of the **Default Response Charset** that you want to use.
- **b.** Enter the length of the **Client Session Timeout** in seconds.
- c. To enable WS-I Compliance, select "Yes."
- d. To enable the WSDL Cache, select "Yes."
- 3. When complete, click the **Save Config** button.

Activating Web Services

Web Services give you the ability to grant permission to third-party applications to access your store data for the purpose of integration. Magento Community Edition supports both SOAP and REST services.

Process Overview:

Step 1: Create a Web Service Role

Step 2: Create a Web Service User

Step 3: Add Custom Scripts to Your Store

Step 1: Create a Web Service Role

- 1. On the Admin menu, select System > Web Services > SOAP/XML-RPC Roles.
- 2. Click the Add New Role button.
- 3. In the Role Information section, enter a Role Name such as "API."
- 4. In the panel on the left, select **Role Resources**. Then do one of the following:
 - To enable full access, set **Resource Access** to "All."
 - To provide limited access to data, set **Resource Access** to "Custom." Then, select the checkbox of each resource that is available to this role.
 - By default, when a area is selected, full access is granted. However, you can specify the actions that a person is allowed to take. Specific types of access are listed under many of the resource links, so it is easy to determine exactly what a user is allowed to do with the resource.
- 5. When complete, click the **Save Role** button.

Step 2: Create a Web Service User

- 1. On the Admin menu, select System > Web Services > SOAP/XML-RPC-Users.
- 2. Click the Add New User button.
- **3.** Complete the following fields:
 - User Name
 - First Name
 - Last Name
 - Email

4. In the **API Key** field, type in a verification key, or password. This is the access credentials that third-party web services will use to access your Magento store.

User Name * Jane First Name * Jane Last Name * Smith Email * Jsmith@example.com API Key * • • • • • • • • • • • • • • • • • •	Account Information		
Last Name * Smith Email * Jsmith@example.com API Key * API Key Confirmation *	User Name *	Jane	
Email * jsmith@example.com API Key * API Key Confirmation *	First Name *	Jane	
API Key * API Key Confirmation *	LastName *	Smith	
API Key Confirmation *	Email *	jsmith@example.com	
	API Key *		
This account is Active	API Key Confirmation *		
	This account is	Active •	

Web Service User

- 5. To confirm, re-enter the key in the **API Key Confirmation** field.
- 6. In the panel on the left, select **User Role**. Then, select a role for the user.
- **7.** When complete, click the **Save User** button.

Step 3: Add Custom Scripts to Your Store

Some third-party web services rely on snippets of JavaScript code to gather data. Some web services require you to insert code in the HTML <head> section, while others require the code to be in the HTML footer, below the closing </body> tag.

REST Roles

The REST API defines a set of functions that developers can use to perform requests and receive responses. To learn more about REST permissions, see: Web Services.

Notes	



CHAPTER 66: System Tools

The system tools give developers, system administrators, and support engineers easy access to routine system processes and reports.

Topics in this chapter:

- Backups
- Installing Magento Patches
- Compilation
- System Log
- Cron

Server Backups & Rollback

Magento Community Edition gives you the ability to back up different parts of the system—such as the database, file system, or both—and to rollback automatically. Files are compressed using the .gz and .tgz formats.

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Backups

Best Practices

Restrict Access to Backup Tools

Access to the backup and rollback tools 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 the rollback resources, you must grant access to backup resources as well.

Backup Before Installing Extensions and Updates

Always perform a backup before installing an extension or updating Magento. Magento Connect Manager (MCM) includes a backup option that you can use before installing an extension or upgrading to a new release.

Creating a Backup

Database backup files are compressed using the .gz format. The .tgz format is used for system, database, and media backups. Backup files are stored in the var/backups directory in your Magento file system. The files that are stored in the /var/cache, /var/log, /var/session and /var/report folders are excluded from the backup.

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O Latent Message: Renalder Cha	rge l'agents's defauit phone numbers and calo	de before alle leunch	- 15 15		You have 9 critical, 8 major, 19 minut and 1	45 rotos umest nesespe	en) <u>Sick rentan</u>
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Create a Backup

To create a single backup:

- 1. On the Admin menu, select **System > Tools > Backups**.
- 2. Click one of the following buttons, depending on the type of backup you need to create:

System Backup	Creates a complete backup of the database and the file system. In the next step you can choose whether to include the media folder to 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. When prompted that the backup will take time, click **OK** to continue.
- **4.** To put the store into maintenance mode during the backup, select the checkbox. After the backup is created, maintenance mode is turned off automatically.
- **5.** If you are creating a system backup, select the **Include Media folder to System Backup** checkbox if you want to include the media folder. When prompted, confirm the action.

All backups are listed on the Backups page. Deleting a record from the list deletes the archive file as well.

To configure regularly scheduled backups:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select **System**.

- 3. Click to expand the Scheduled Backup Settings section. Then, do the following:
 - a. Set **Backup Type** to one of the following:
 - Database
 - Database and Media
 - System
 - System (excluding Media)
 - **b.** Set the **Start Time** of the backup to the hour, minute, and second.
 - c. Set the **Frequency** of the backup to one of the following:
 - Daily
 - Weekly
 - Monthly

Scheduled Backup Settings		٩
Enable Scheduled Backup	Yes	[GLOBAL]
Backup Type	Database	[GLOBAL]
Start Time	00 💌 : 00 💌 : 00 💌	[GLOBAL]
Frequency	Daily	[GLOBAL]
Maintenance Mode	No A Put store on the maintenance mode while backup's creation	[GLOBAL]

Scheduled Backup Settings

4. To take the store offline during the backup process, set Maintenance Mode to "Yes."

To backup from Magento Connect Manager

- 1. On the Admin menu, select System > Magento Connect > Magento Connect Manager.
- 2. Select the **Create Backup** checkbox and select the backup type.
- **3.** Proceed with an extension installation or Magento update. The backup is created automatically and available at **System > Tools > Backups**.

Rolling Back Changes

Important! Use Rollback with caution. Customers who are in the process of checking out when you start the rollback may not be able to complete the process.

To roll back the whole system or the database:

- 1. On the Admin menu, select **System > Tools > Backups**.
- **2.** On the Backups page, find the backup you want. Then in the Action column, click the **Rollback** link.

All changes made since the backup was created will be lost after the rollback.

3. Confirm the rollback. When prompted, enter your Admin **Password**. Then, choose whether you want to put your store into the maintenance mode during the roll back. When restoring file system or database and media files you can choose to use the FTP connection.

After the rollback, you are redirected to the Admin login page.

4. Refresh all cache types and rebuild required indexes.

solution series: Installing Magento Patches

Magento recently launched several patches to correct vulnerabilities in the system. It is recommended that you upgrade your store to the latest version of Magento, and install any security-related patches as soon as they become available.

Because of the variation in hosting environments and access to the server, there is no "one size fits all" way to install a patch. This article describes the following three methods that you can use to install a patch:

- SSH
- Run a Script
- Upload Pre-Patched Files

If your hosting provider doesn't provide SSH access to the server, try one of the other methods. Although the focus of this article is on security patches, the same methods can be used to install any Magento patch.

Step 1: Back Up Your Magento Installation

Always back up your Magento installation before installing a patch. To learn more, see: Creating a Backup

Step 2: Download the Patch

To download the recommended patches for your version of Magento Community Edition, visit the Magento download page.

Step 3: Disable the Compiler

If your store is compiled, make sure to disable compilation before installing a patch. After installing a patch, test the store thoroughly. Then, run the compiler again. Your store must be recompiled for the patch to take effect.

Step 4: Install the Patch

Method 1: Use SSH

Secure Shell (SSH) is the recommended way to install a patch. If you don't know how to set up SSH, contact your hosting provider. For detailed instructions, see: Installing Patches with SSH.

- 1. Upload the patch files to the root of your [magento] installation folder.
- 2. If the store is compiled, make sure the compiler is disabled.

3. In the SSH console, run the following commands according to the patch extension:

.sh extension

```
sh patch_file_name.sh
```

.patch extension



- 4. Use either of the following methods to verify that the patch was installed:
 - Download or view the file: app/etc/applied.patches.list.

GNU	nano	2.0).9 File: applied.patches.list	
-				
			:35:00 UTC SUPEE-5344 EE_1.14.1.0 v1 a5c9abcb6a387aabd6b33ebcb79f6b7a97bbde77 \$	
			app/code/core/Mage/Admin/Model/Observer.php	
patch	ing f	ile	app/code/core/Mage/Core/Controller/Request/Http.php	
patch:	ing f	ile	app/code/core/Mage/Oauth/controllers/Adminhtml/Oauth/AuthorizeController.php	
patch:	ing f	ile	app/code/core/Mage/XmlConnect/Model/Observer.php	
patch	ing f	ile	lib/Varien/Db/Adapter/Pdo/Mysql.php	

applied.patches.list

• From the command line, run the patch file with the --list argument for a report of all patch installations.

-bash-4.1\$ sh PATCH SUPEE-5994_CE_1.6.0.0_v1-2015-05-15-04-34-46.shlist Applied/reverted patches list: 2015-04-28 l8:35:00 UTC SUPEE-5844 EE_1.14.1.0 v1 a5c9abcb6a387aabd6b33ebcb79f6b7a97bbde77 Thu Feb 5 19:14:49 20 15 40200 v1.14.1.0READ	
-bash-4.1\$	۲
list argument	

Method 2: Run a Script

The following example shows how to install the SUPEE_5344.sh patch. Make sure to replace the patch name in the example with the name of the patch file to be installed.

- 1. Upload the patch files to the root of your [magento] installation folder.
- 2. If the store is compiled, make sure the compiler is disabled.
- **3**. From your desktop, do the following:
 - a. Use a text editor to create a file named patch.php that contains the following script.

```
<?php
print("<PRE>");
passthru("/bin/bash PATCH_SUPEE-5344.sh");
print("</PRE>");
```

```
echo "Done";
?>
```

- **b.** Upload the patch.php file to the root of your [magento] installation folder.
- **4.** Run the script from your browser.

http://www.[yourstore.com]/patch.php

Then, look for the following message:

Checking if patch can be applied/reverted successfully... Patch was applied/reverted successfully. Done

5. After the patch is successfully installed, delete the patch.php file from your server.

If you receive the following error, either ask your hosting provider to install the missing tools, or try one of the other methods.

"Error! Some required system tools, that are utilized in this sh script, are not installed; Tool (s) "patch" is (are) missed, please install it(them).

- 6. Refresh your cache from the Magento Admin, Don't forget to refresh your OPcode or APC cache as well.
- 7. If your store is compiled, rerun the compiler.

Method 3: Upload Pre-Patched Files

- 1. Download your Magento installation to your local machine.
- **2.** Apply the patch locally.
- 3. Upload the updated files to your server.

Acknowledgment

We'd like to thank Shivbhadra Gohil and the MageComp team for sharing solutions on the Magento Forums, and for contributing practical, real-world solutions for this article. See the original forum post for additional insight and links.

Installing Patches with SSH

Whenever a patch is released to fix an issue in the code, a notice is sent directly to your Admin InboxInbox. If the update is security related, the incoming message is color-coded red, and marked as a "Critical Update."

The following instructions explain how to download and install a patch, starting with a notice that appears in your Admin Inbox. The example takes place on a Windows system, and uses the WinSCP utility to upload patch files to the server, and Putty to access the server from the command line. You can download both utilities at no charge. If you are a Mac user, you can access the command line with Terminal.

If this is the first time you have installed a patch, we recommend that you complete the optional steps to create a backup copy of your store and install a patch as a test run. If you have experience installing patches, you can take the fast track and skip the optional steps. For advanced instructions, see the following articles in the Magento developer documentation:

How to Apply and Revert Magento Patches

Recommended File System Ownership and Privileges

Before you begin...

To install a patch, you must have a user name and password to access the server. In addition to your own login credentials, you might also need the apache password. If you don't have these credentials, contact the person who set up your server.

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Arritige Orders			patches	
	\$1,919.67	DRITICAL	• final otiats	bund
Last & Driters		the second s		-
Contractory (diama .	Grane Tone		
Jane Doe		1 0075.58		
Jane Dok		\$175.55		
Jay Smith		\$372.30		
Jay Smith		\$372.30		
John Doe		1 100.00		

Incoming Message of Critical Importance

Process Overview:
Step 1: Download the Patch
Step 2: Set the Necessary Permissions
Step 3: Create a Backup of the Magento Folder (Optional)
Step 4: Upload the Patch
Step 5: Install the Patch on the Backup (Optional)
Step 6: Install the Patch to Your Store
Step 7: A Little Housekeeping (Optional)
Step 8: Look for Signs of Unauthorized Access (For security-related issues)
Step 9: Clear the Magento Cache
Step 10: Recompile the Store (Only if compiled)
Step 11: Restart the Server

Step 1: Download the Patch

1. When you receive the message in your Inbox, click the **Read details** link to open the Magento Community Edition Download page. (The link in the Inbox is for convenience, and you can access the Download page at any time.)

() Magento	۹	FREE DEMO	MY ACCOUNT
PRODUCTS CUSTOMERS PARTNERS TRAINING RESOURCES HELP COMPANY BLOG)≓
Download Release Archive How to Get Started			
Full Release			
This is the latest statile release of the Magento Community Eddon. Least None a			
ver 1.9.1.8 - Added Nov 24, 2014 5			
Downloader			
The downloader will install the latest Magento version			
ver 1.8.1.9 - Added Nov 24, 2014 Ealect your format OCMML CAD			

Download Tab

2. Scroll down to the **Download** tab, under the Magento Community Edition Patches section. Then, find the patches that need to be installed. For this example, we'll download the following patches:

SUPEE-5344	Addresses a potential remote code execution exploit (Added Feb 9, 2015)
SUPEE-1533	Addresses two potential remote code execution exploits (Added Oct 3, 2014)

Please upload the patch into your Magento root direct For patch files with the file extension .sh:	tory and run the appropriate SSH command:
sh patch file name.sh	
Example: sh PATCH SUPEE-1868 CE 1.7.0.2 v1.s	h
For patch files with the file extension .patch:	
patch -p0 < patch_file_name.patch	
Once that is done, refresh the cache in the Admin und	der "System > Cache Management" so that the changes will be
reflected. We highly recommend you test all patches i	in a test environment before taking them live.
SUPEE-5344 - Addresses a potential remote code execution exploit Added Feb 9, 2015	Select your format DOWNLOAD Select your format Magento-CE-v1.8.x-1.9.x (0.01 MB)
SUPEE-4829 - This patch fixes an issue in which product images become larger when a shopper selects a swatch on a search result page Added Nov 26, 2014 Note: This patch is applicable only to Magento Community Edition 1.9.1	Magento-CE-v1.6.1.x-1.6.2.x (0.01 MB) Magento-CE-v1.6.0.x (0.01 MB) Magento-CE-v1.5.1.0 (0.01 MB) Magento-CE-v1.4.0.0-1.5.0.1 (0.01 MB)
SUPEE-1533 - Addresses two potential remote code execution exploits Added Oct 3, 2014 Note: Please find details on this patch here.	Select your format DOWNLOAD

Magento Community Edition Patches

- **3.** For each patch to be downloaded, do the following:
 - **a.** In the **Select your format** box, select the version of Magento Community Edition that is installed on your server. If you don't know the version number, you can find it in the footer of the Admin.

Interface Locate, English Christol States / English 💽	Vigueto ser 1312	Control : and the American Contrology Magnetic ¹⁴ is a transmission of Magnetic Int Consequent © 2019 Magnetic Int	
	Magento Version in Footer		

b. Click the **Download** button. Look for the downloaded file in the lower-left corner of your browser.

If prompted, log in to your account. If you don't have an account, click the **Create an Account Now!** button, and follow the instructions. Then, return to the Download page and continue.

ANTON, SUPRE-1510_E_#		8 Show all diverticable. ×
	Cores a false of this type Cores in false Corest	

Show Downloads Folder

c. Click the **down arrow** next to the download file name to display the menu. Then, select **Show in folder**. The patches are in the Download folder of your desktop computer.

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Organize · Include in Ibrary	Share with New folder)= • C	
R 😒 Favorites	A Name	Date modified -	Type	Sat	-
Cestato Contacts C	■ PATOL SUPEE-1333_E_113x_v1-2015-02-10-06-10-32 ■ PATOL SUPEE-4344_CE_18.0.0_v1-2015-02-10-08-10-38	4/22/2023 3-33 PM 4/22/2023 3-44 PM UDDP of Down			748

Downloaded Patch Files

Step 2: Set the Necessary Permissions

For a live store, permissions are locked down to prevent unauthorized access. However, you must change the permissions of the contents of the Magento installation folder before you can install the patch. In the following instructions, Putty is used to access the command line and change the permissions.

- 1. Click the **Start** button in the lower-left corner of your desktop, and launch **Putty**. When prompted, enter the **Host Name** or **IP Address** of your store, and click the **Open** button.
- 2. Servers have different directory structures, and the path to your Magento installation folder is most likely different from the one shown in the examples. Depending on your server, the path to your Magento installation folder might be one of the following:

SERVER	РАТН
Ubuntu	/var/www/magento
CentOS	/var/www/html/magento

From the command line, use the **Change Directory** command to navigate to your Magento installation folder. In this example, Magento is installed on a CentOS server, and the Magento installation folder is located three levels below the html folder.

cd /var/www/html/stores/ce/magento

3. List the directory to check the permission status of the magento folder. To install a patch, you must temporarily change the folder permissions. After the patch is installed, you can restore the appropriate permissions to your live store.

ls -l

If you get a "Permission denied" message, add sudo to the beginning of the List Directory command.

```
sudo ls -l
```

The second column shows the current permission settings for the contents of the magento folder. It includes a combination of read only, read/write, and execute permissions, depending on the type of folder or file. Take note of the owner and group in the next two columns. You probably won't need this information, but it's good to know. In this example, each folder and file is owned by the apache user and belongs to the root group.

🛃 stack	@m2-docs-stag	ing-!	523722:/v	ar/www	v/html/st	ores/	ce/m	nagento		- D ×
_	@m2-docs-sta									
total	700									
283348			apache	root	2834	Nov		09:06	api.php	
283980	dr-x		apache	root	4096	Nov		09:07	app	
283565			apache	root	2831	Nov		09:06	cron.php	
283567			apache	root	717	Nov		09:06	cron.sh	
905528	dr-x		apache	root	4096	Mar	16	23:20	downloader	
283352	dr-x		apache	root	4096	Nov		09:06	errors	
283568			apache	root	1150	Nov		09:06	favicon.ico	
283382			apache	root	5979	Nov		09:06	get.php	
283417	dr-x		apache	root	4096	Nov		09:06	includes	
283349			apache	root	2642	Nov		09:06	index.php	
283350			apache	root	2366	Nov		09:06	index.php.sample	
									install.php	
283421	dr-x	12	apache	root	4096	Nov		09:06	js	
544544	dr-x	14	apache	root	4096	Nov		09:07	lib	
									LICENSE_AFL.txt	
									LICENSE.html	
									LICENSE.txt	
	drwx									
									php.ini.sample	
	dr-x									
									RELEASE_NOTES.txt	
	dr-x									
	dr-x									
	drwx					Apr	12	18:49	var	
[stack	@m2-docs-sta	agir	ng-52372	22 mag	gento]\$					-

Recommended Permissions for a Live Store

4. To install a patch, you must change the permissions to allow the necessary files to be copied and overwritten, and to make it possible for the script to execute. Enter the following commands to change the permissions of the directories and files in the folder. Then, list the directory.

To save time, copy each command from the example, and press the mouse button to paste it into the command line.

Open Up Permissions

```
find . -type d -exec chmod 700 {} \;
find . -type f -exec chmod 600 {} \;
ls -l
```

If your Magento installation is on a shared virtual server, you might need to begin each command as a sudo super administrator:

```
sudo find . -type d -exec chmod 700 {} \;
sudo find . -type f -exec chmod 600 {} \;
sudo ls -l
```

The first column in the directory shows the updated permission settings. After the patch is installed, you will restore the recommended permissions to your store.

stack@m2-d	000	-stadi	ng=52	3722 ma	v/htm rentr	518	sudo	la _1	
otal 700		5-3tayri	1g-52.	5722 Illa	Jeno	914	suuo .		
rw		apache	root	2834	Nov		09:06	ani.nhn	
rwx									4
rw								* *	
rw									
								downloader	
rwx									
								favicon.ico	
cw									
rwx	2	apache	root	4096	Nov	5	09:06	includes	
ew		apache	root	2642	Nov		09:06	index.php	
ew		apache	root	2366	Nov		09:06	index.php.sample	
cw		apache	root	6441	Nov		09:06	install.php	
cwx	12	apache	root	4096	Nov		09:06	js	
wx	14	apache	root	4096	Nov		09:07	lib	
cw		apache	root	10421	Nov		09:08	LICENSE AFL.txt	
cw		apache	root	10679	Nov		09:07	LICENSE.html	
cw		apache	root	10410	Nov		09:06	LICENSE.txt	
cw		apache	root	1319	Nov		09:06	mage	
wx	16	apache	root	4096	Feb	28	19:04	media	
cw		apache	root	886	Nov		09:06	php.ini.sample	
cwx		apache	root	4096	Nov		09:06	pkginfo	
cw		apache	root	585086	Nov		09:08	RELEASE_NOTES.txt	
rwx		apache	root	4096	Nov		09:07	shell	
wx		apache	root	4096	Nov		09:06	skin	
rwx	11	apache	root	4096	Apr	12	18:49	var	

Updated Permissions

Step 3: Create a Backup of the Magento Folder (Optional)

1. Use the Change Directory command, followed by two dot to move one level up in the directory tree. Then, list the directory so you can see the magento folder.

```
cd ..
ls -l
```

2. Enter the following command to create a new folder, called backup.

```
mkdir backup
ls -l
```

a. If you get a "Permission denied" message, add sudo to the beginning of the Make Directory command. Then, list the directory to see the folder that you created.

```
sudo mkdir backup
sudo ls -l
```

b. The backup folder must have the same owner and group as the magento folder. If not, enter the following command to change the ownership of the backup folder and its contents.

In this command, the backup folder is assigned to the apache user and root group, and followed by a single dot. (Don't forget to use sudo if you need super administrator access.)

```
chown -hR apache:root backup .
ls -l
```

c. Enter the "who am I" command to see if you are logged in as the correct owner.

whoami

d. If you are not logged in as the apache user, enter the following command. When prompted, enter the password for the apache user account.

su - apache

Notice that the prompt has changed. You are now in the bash folder of the apache user. While you're logged in as the apache user, you won't need to use sudo for super administrator access.

3. Use the Change Directory command to return to the location of your magento and backup folders. List the directory to see where you are. Then, check to see who you are.



🛃 stack@m2-	docs	s-staging-!	523722	:/var/v	/ww/l	ıtml,	/stores/	ce	_ 🗆 ×
total 12									
drwxrwxr-x		apache	root	4096	Apr	28	17:48		
drwx	13	apache	root	4096	Nov		09:15		
drwxrwxrwx		apache	root	4096	May	12	2014	magento-sample-data-1.9.0.0	
-bash-4.1\$	who	oami							
apache									
-bash-4.1\$									-

Backup Folder with Correct Owner and Group

4. Copy the contents of the magento folder to the backup folder.

cp -r magento/* backup

5. Wait for the process to complete and for the system prompt to return. Then, take a look at the contents of the backup folder to make sure the files were copied.

```
cd backup
ls -l
cd ..
```

6. Because you'll be working with the backup folder for awhile, it's a good idea to restore the original permissions to your magento folder before continuing.

Enter the following commands to restore the recommended permissions to the magento folder. Then, list the directory to verify that the permissions are restored.

To save time, copy each command from the example, and press the mouse button to paste it into the command line.

Lock Down Permissions

```
ls -l
cd magento
find . -type d -exec chmod 500 {} \;
find . -type f -exec chmod 400 {} \;
find var/ -type f -exec chmod 600 {} \;
find media/ -type f -exec chmod 600 {} \;
find var/ -type d -exec chmod 700 {} \;
find media/ -type d -exec chmod 700 {} \;
ls -l
```

	m2-docs-sta	ıgir	ng-52372	22 mag	gento]\$	sud	o 1:	s —li		
otal 7	00									
83348	-r		apache	root	2834	Nov		09:06	api.php	
83980	dr-x		apache	root	4096	Nov		09:07	app	
83567	-r		apache	root	717	Nov		09:06	cron.sh	
05528 (dr-x		apache	root	4096	Mar	16	23:20	downloader	
83352 (dr-x		apache	root	4096	Nov		09:06	errors	
83568			apache	root	1150	Nov		09:06	favicon.ico	
83382			apache	root	5979	Nov		09:06	get.php	
83417 (dr-x		apache	root	4096	Nov		09:06	includes	
83349			apache	root	2642	Nov		09:06	index.php	
83350			apache	root	2366	Nov		09:06	index.php.sample	
83351			apache	root	6441	Nov		09:06	install.php	
83421 (dr-x	12	apache	root	4096	Nov		09:06	js	
44544 (dr-x	14	apache	root	4096	Nov		09:07	lib	
87243	-r		apache	root	10421	Nov		09:08	LICENSE_AFL.txt	
83970 -	-r		apache	root	10679	Nov		09:07	LICENSE.html	
83566			apache	root	10410	Nov		09:06	LICENSE.txt	
83420			apache	root	1319	Nov		09:06	mage	
83976	drwx	16	apache	root	4096	Feb	28	19:04	media	
83381 -			apache	root	886	Nov		09:06	php.ini.sample	
83377	dr-x		apache	root	4096	Nov		09:06	pkginfo	
87242			apache	root	585086	Nov		09:08	RELEASE_NOTES.txt	
83971 (dr-x		apache	root	4096	Nov		09:07	shell	
43595	dr-x		apache	root	4096	Nov		09:06	skin	
83383	drwx	11	apache	root	4096	Apr	12	18:49	var	

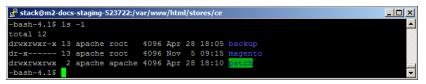
Locked Down Permissions

Step 4: Upload the Patch

1. To avoid permission problems when you upload the patch from your desktop, create a folder for the patch without any restrictive permissions. From Putty, navigate back to the level of the magento and backup folders. Then, make a new folder called patch, and change the permissions of the folder to 777.



You now have three folders with different permissions. The patch folder is wide open with read, write and execute permissions. For this limited purpose, it's OK.



Folders with Different Permissions

- 2. Return to your desktop, and launch WinSCP, or a similar tool. Then, log in to the server.
- 3. In the right pane, navigate on the server to the location of the patch folder.
- **4.** In the left pane, go to your **Downloads** folder, and find the patch files that you downloaded. Drag the files over to the right pane, and drop them on the **patch** folder.

Downloads - ccondra@10.9.220.154 - WinSCP					
 Queue • H Conductoria View Conductoria Queue • H Conductoria			.		
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5: Ubera kcondra (Downloada	Iver how him him historea lat	Sec. W		1	315
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PATOL SAFE 1.11.x. v1-0103-10-01-08-32.0h PATOL SAFE 1.00.0 v1-0016-20-20-00-06-38.ch Php 5.6.5-WM32-VC11:V86.2p Pole-0-38.ch Php 5.6.5-WM32-VC11:V86.2p Pole-0-38.ch Pole-0-30.ch Pole-0-30.ch Pole-0-30.ch Pole-0-30.ch <tr< td=""><td>i patch badhup magmto</td><td>4/27/2015 31:37 4/28/2015 11:1 4/28/2015 11:0 11/5/2014 1:15</td><td>THORWORTVOX THORWORT-X</td><td>apache apache apache apache apache</td><td></td></tr<>	i patch badhup magmto	4/27/2015 31:37 4/28/2015 11:1 4/28/2015 11:0 11/5/2014 1:15	THORWORTVOX THORWORT-X	apache apache apache apache apache	
16,901 B of 3,754 MB in 2 of 136	0Bof0Bin1of3				
		6	SPTP-3	101	0:51:02

Upload the Patch Files

Step 5: Install the Patch to the Backup (Optional)

1. Return to Putty in the directory where the patch, backup, and magento folders are located. Change directories to the patch folder, and list a directory to verify that the patch files are there. Then, copy each patch file up one level. (Just remember—two dots up, one dot down.)

```
cd patch
ls -l
cp PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh ..
cp PATCH_SUPEE-5344_CE_1.8.0.0_v1-2015-02-10-08-10-38.sh ..
cd ..
ls -l
```

Now the patch files are at the same level as the backup and magento folders, where they can be easily accessed.

stack@m2-	doc	-staging-	523722:/v	ar/www.	/html	/sto	res/ce		
-bash-4.15 total 32	1#	-1							-
ITWREWRE-R		apache	root	4096	Apr	28	18:05		
1r-x		apache	root	4096	Nov		09:15		
ITWXTWXTWX		apache	apache	4096	Apr	28	18:25	paton	
-IM-II		apache	apache	6350	Apr	28	18:26	PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh	
-IW-II		apache	apache	10551	Apr		18:26	PATCH SUPEE-5344 CE 1.8.0.0 v1-2015-02-10-08-10-38.sh	-13
-bash-4.19									

Patch Files Uploaded and Ready to Go

2. Because the temporary patch folder has served its purpose, enter the following command to remove it from the server:

```
rm -rf patch
ls -l
```

3. Copy each patch file to the backup folder. Then, change directories to the backup folder, and list the directory. You should see the patch files in the directory.

```
cp PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh backup
cp PATCH_SUPEE-5344_CE_1.8.0.0_v1-2015-02-10-08-10-38.sh backup
cd backup
ls -1
```

4. To install the patch, use the appropriate syntax for the type of patch, and substitute the file name of the patch to be installed. There are two command formats, depending on the patch file name extension. To avoid typos, copy the patch file name from Putty, and paste it into Notepad. Then, add the required command syntax, paste it into the command line, and press Enter.

EXTENSION	COMMAND SYNTAX
.sh	<pre>sh [patch_filename.sh]</pre>
.patch	<pre>patch -p0 < [patch_filename.patch]</pre>

```
sh PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh
sh PATCH SUPEE-5344 CE 1.8.0.0 v1-2015-02-10-08-10-38.sh
```

The following message appears if the installation succeeds:

Patch was applied/reverted successfully.

If the patch is already installed on your computer, an error message appears. You don't need to install it again.

So that's really all there is to it. It might seem rather anticlimactic after so much preparation, but it's important to understand the process before you apply the patch to your store.

5. The next step is to change directories to the magento folder, and reset the permissions so the patch can be copied and installed to your live store. Then, you will copy the patch file to the magento folder.

```
cd ..
ls -l
cd magento
find . -type d -exec chmod 700 {} \;
find . -type f -exec chmod 600 {} \;
cd ..
cp PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh magento
cp PATCH_SUPEE-5344_CE_1.8.0.0_v1-2015-02-10-08-10-38.sh magento
cd magento
ls -l
```

Step 6: Install the Patch to Your Store

1. From your magento folder, enter the appropriate command to install the patch, and press Enter.

EXTENSION	COMMAND SYNTAX
.sh	sh [patch_filename.sh]
.patch	<pre>patch -p0 < [patch_filename.patch]</pre>

To avoid typos, copy the name of the patch file from your Downloads folder and paste it into Notepad. Complete the required command syntax, and copy it to the clipboard. Then, press the mouse button to paste it into the command line.

```
sh PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh
```

- sh PATCH_SUPEE-5344_CE_1.8.0.0_v1-2015-02-10-08-10-38.sh
- 2. When the process is complete, remove the patch files from the magento folder.

```
rm PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh
rm PATCH SUPEE-5344 CE 1.8.0.0 v1-2015-02-10-08-10-38.sh
```

3. Enter the following commands to lock down permissions to the magento folder.

Lock Down Permissions

```
find . -type d -exec chmod 500 {} \;
find . -type f -exec chmod 400 {} \;
find var/ -type f -exec chmod 600 {} \;
find media/ -type f -exec chmod 600 {} \;
find var/ -type d -exec chmod 700 {} \;
find media/ -type d -exec chmod 700 {} \;
ls -l
```

Step 7: A Little Housekeeping (Optional)

To remove the backup folder and patch files from your server, enter the following commands:

```
cd ..
ls -l
rm -rf backup
rm PATCH_SUPEE-1533_EE_1.13.x_v1-2015-02-10-08-18-32.sh
rm PATCH_SUPEE-5344_CE_1.8.0.0_v1-2015-02-10-08-10-38.sh
ls -l
```

Step 8: Look for Signs of Unauthorized Access (For security-related issues)

- 1. Log in to the Admin of your store.
- 2. On the Admin menu, select **System > Users**. Then, do the following:
 - a. Verify that there are no unauthorized user accounts in the list.
 - **b.** If you find an unknown user account in the list, click to open the account. Then, click the **Delete User** button.

To learn more about detecting signs of unauthorized access, see: Critical Security Advisory. If you suspect that your site is compromised, contact the security department of your hosting company and request an audit.

Step 9: Clear the Magento Cache

- 1. On the Admin menu, select System > Cache Management.
- 2. Click the Flush Cache Storage button.

Step 10: Recompile the Store (Only if compiled)

If your store is compiled, you must recompile to incorporate the patch. If your store isn't compiled, you can skip this step.

- 1. On the Admin menu, select **System > Tools > Compilation**.
- 2. Click the **Run Compilation Process** button.

Step 11: Gracefully Restart the Server

The final step is to restart the server to flush any remaining caches, such as the APC and/or Zend OpCache. The following steps show how to gracefully restart the server without disrupting pages from being served, or causing loss of data.

- 1. If your server has a control panel such as c Panel, look for the option to gracefully reboot the server. On cPanel, select **Home > System Reboot > Graceful Server Reboot**.
- **2.** To gracefully restart from the command line, do the following:
 - **a.** The syntax to restart the server from the command line varies by operating system. To find the version that is running on your server, enter the following:

cat /etc/issue

b. Use the appropriate command to gracefully restart the server. If necessary, begin the command with sudo.

CentOS / Fedora / Redhat

apachectl -k graceful

Debian / Ubuntu

apache2ctl graceful

3. To end the session, close both the **Putty** and **WinSCP** windows.

If you have more than one server, make sure to install the patch on all Magento servers.

Compilation

The compiler is disabled by default. The first time you run the compiler, the status changes to "Enabled." A summary of the compilation state appears at the top, and includes the status of the compiler and state of the compilation, the number of files compiled, and the number of compiled scopes.

To run the compiler:

- 1. On the Admin menu, select **System > Tools > Compilation**.
- 2. Click the **Run Compilation Process** button.

To disable the compiler:

Click the **Disable** button.

Magento Admin Pa	nel	Global Record Search	Lagged in as admin (Sunday, November 9, 2914 Lag
Dashboard Sales Catalo	g Customers Promotons Newsletter CMS	Reports System	🕐 Get help for this pa
Latest Message: Raminder Change	Magenio's default phone numbers and calcula before site launch	You have 2 critical, 5 may	or. 19 minor and 62 notice unread message(s). Go to software
The compilation has completed			
Compilation			O Disable O Run Compliation Proces
Compliation State			
Compiler Status	Enabled		
Compilation State	Compiled		
Collected Files Count	7152		
Compiled Scopes Count	4		
Scopes Compilation Settings	default		
	Mage_ctableg_Biol_Netwarks Mage_ctableg_Biol_Protect_Altrated Mage_ctableg_Biol_Protect_Altrated Mage_ctableg_Helee_Protect_Campare Mage_ctableg_Helee_Protect_Campare Mage_ctableg_Model_ctablegory Mage_ctableg_Model_Service Mage_ctableg_Model_Service Mage_ctableg_Biol_Code_Ctablegory Mage_ctableg_Biol_Service Mage_ctableg_Biol_Service Mage_ctableg_Biol_Service Mage_ctableg_Biol_Service Mage_ctableg_Biol_Service Mage_ctableg_Biol_Service Mage_Checkorg_Biol_Model		
	Mage_Page_Helper_Duta Mage_Page_Helper_Lavoid Mage_Page_Model_Confg		
	catalog Mage_catalog_Block_Breadcrunts Mage_catalog_Block_Breadcrunts Mage_catalog_Network_Nature Mage_catalog_Network_Nature Mage_catalog_Mede_Creation Mage_catalog_Mede_Product Mage_catalog_Mede_Product Mage_catalog_Mede_Product_Stability Mage_catalog_Mede_Product_Stability Mage_catalog_Mede_Product_Stability Mage_catalog_Mede_Pressure_Abitsat Mage_catalog_Mede_Pressure_Abitsat Mage_catalog_Mede_Pressure_Collector_Abitsat Mage_catalog_Mede_Pressure_Collector_Abitsat		*
	checkout		
	Mage_ctatisgindes_Mode_Price Mage_ctatisgindes_Mode_Resource_Abstract Mage_ctatisgindes_Mode_Resource_Price Mage_ctatisginetity_Mode_Resource_Price Mage_ctatisginetity_Mode_Resource_Boto_ Mage_ctatisginetity_Mode_Resource_Boto_ Mage_ctatisginetity_Mode_Resource_Boto_ Mage_ctatisginetity_Mode_Resource_Boto_ Mage_ctatisginetity_Mode_Resource Mage_ctatisginetity_Mode_Resource Mage_ctatisginetity_Mode_Resource Mage_ctatisginetity_Mode_Resource Mage_ctatisginetity_Mode_Resource Mage_ctatisginetity_Mode_Resource_Boto_Boto_ Mage_ctatisginetity_Mode_Reso_Boto_Boto_Boto_ Mage_Ctatisginetity_Mode_Reso_Boto_Boto_Boto_Boto_Boto_Boto_Boto_Bo	Collection Is	i

Compilation Complete

System Log

The System Log activate system logs, and determine the name of the system and exception log files.

To configure system logs:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select **Developer**.
- 3. Click to expand the Log Settings section. Then, do the following:
 - a. Set Enabled to "Yes."
 - **b.** In the **System Log File Name** field, enter the name you want to use for the system log file, in lowercase characters. The default file name is: system.log
 - **c.** In the **Exceptions Log File Name** field, enter the name you want to use for the exceptions log file, in lowercase characters. The default file name is: exceptions.log

g Settings			
Enabled	No	[STORE VIEW]	
System Log File Name	system.log	[STORE VIEW]	
	▲ Logging from Mage::log(). File is located in		
	{{base_dir}}/var/log		
Exceptions Log File Name	exception.log	[STORE VIEW]	
	▲ Logging from Mage::logException(). File is located in		
	{{base_dir}}/var/log		

Log Settings

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Enabled	Store View	Determines is a system log is generated and saved on the server. Options include: Yes / No
System Log File Name	Store View	The name of the system log file. Default value: system.log File location: {{base_dir}}/var/log
Exceptions Log File Name	Store View	The name of the exceptions log file. Default value: exception.log File location: {{base_dir}}/var/log

System Log Cleaning

System logs can be scheduled to be cleaned automatically as a Cron job. The configuration determines the number of days that system logs are kept on the server, how frequently the logs are cleaned, and who is notified if an error occurs.

To scheule system log cleaning:

- 1. On the Admin menu, select **System > Configuration**.
- 2. In the panel on the left, under Advanced, select System.
- 3. Click to expand the Log Cleaning section. Then, do the following:
- 4. Set **Save Log Days** to the number of days that system log files are kept on the server.
- **5**. To automatically clean the system log on schedule, set **Enable Log Cleaning** to "Yes." Then, do the following:
 - **a.** Set **Start Time** to the hour, minute, and second that the system log is to be cleaned.
 - **b.** To determine how often the system log is cleaned, set **Frequency** to one of the following:
 - Daily
 - Weekly
 - Monthly
 - **c.** In the **Enter Email Recipient** field, enter the email address of the person to receive notificaition if an error occurs during log cleaning. Separate multiple addresses with a comma.
 - **d.** In the **Error Email Sender** field, select the store contact that appears as the sender of the error notification.
 - e. Select the Error Email Template to be used for the notification

Log Cleaning		٥
Save Log, Days	180	[GLOBAL]
Enable Log Cleaning	No	[GLOBAL]
Start Time	00 💌 : 00 💌 : 00 💌	[GLOBAL]
Frequency	Daily	[GLOBAL]
Error Email Recipient		[GLOBAL]
Error Email Sender	General Contact	[GLOBAL]
Error Email Template	Log cleanup Warnings (Default Template from L	[GLOBAL]

Log Cleaning

6. When complete, click the **Save Config** button.

FIELD	SCOPE	DESCRIPTION
Save Log, Days	Global	Determines the number of days the system log is saved.
Enable Log Cleaning	Global	Determines if the system log is periodically cleaned. Options include: Yes / No
Start Time	Global	Sets the hour, minute, and second that log cleaning is scheduled to start.
Frequency	Global	Determines how often the system logs are cleaned. Options include: Daily Weekly Monthly
Error Email Recipient	Global	The email address of the person who is to receive notificaiton of any error that occurs during system log cleaning. Separate multiple addresses with a comma.
Error Email Sender	Global	Identifies the store contact that appears as the sender of the log cleaning error notification. Options include: General Contact Sales Representative Customer Support Custom Email 1 Custom Email 2
Error Email Template	Global	Identifies the email template that is used for the log cleaning error notification. Default template: Log cleanup Warnings

Field Descriptions

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 of your store. Store operations that run according to a cron schedule include:

- Email (Transactional and any other email sent from the store.)
- Catalog Price Rules
- Newsletters
- Google Sitemap Generation
- Customer Alerts and Notifications
- Currency Rate Updates
- Log Cleanup

Make sure that the secure and unsecure base URLs for the store are set correctly, so the URLs that are generated during cron operations are correct. To learn more about cron jobs, see How to Set Up a Cron Job.

Cron (Scheduled Tasks) - all the times are in minutes							
For correct URLs generated during cron runs please make sure that Web > Secure and Unsecure Base URLs are explicitly set.							
Generate Schedules Every	15	ISTORE VIEWI					
Generate Schedules Every	15	[STORE VIEW]					
Schedule Ahead for	20	[STORE VIEW]					
Missed if Not Run Within	15	[STORE VIEW]					
History Cleanup Every	10	[STORE VIEW]					
Thotory oroundp Every							
Success History Lifetime	60	[STORE VIEW]					
Tellure I Beker I Heline	200						
Failure History Lifetime	600	[STORE VIEW]					

Cron (Scheduled Tasks)

To configure cron:

- 1. On the Admin menu, select **System > Configuration**.
- **2.** In the panel on the left, under Advanced, select **System**. Then, click to expand the **Cron** section.
- 3. Enter the number of minutes for each of the following:
 - Generate Schedules Every
 - Schedule Ahead for
 - Missed if not Run Within
 - History Cleanup Every
 - Success History Lifetime
 - Failure History Lifetime

4. When complete, click the **Save Config** button.

Field Descriptions

FIELD	SCOPE	DESCRIPTION
Generate Schedules Every	Store View	Determines the frequency in minutes, that schedules are generated.
Schedule Ahead for	Store View	Determines the number of minutes in advance that schedules are generated.
Missed if Not Run Within	Store View	Determines the number of minutes before a cron job that hasn't yet executed is marked as missed.
History Cleanup Every	Store View	Determines the number of minutes that pass before the cron history is cleaned.
Success History Lifetime	Store View	Determines the number of minutes that the record of successfully completed cron jobs are kept in the database.
Failure History Lifetime	Store View	Determines the number of minutes that the record of failed cron jobs are kept in the database.

Magento Test Framework

The Magento Test Framework (MTF) is a tool that can run nearly 170 automated functional tests, which are included in Magento and designed to improve the quality of implementations and to make it easier to perform basic acceptance testing when adding extensions, making customizations, or upgrading Magento.

Topics in this section include:

- Requirements
- Installation
- Configuration
- Running MTF
- FAQ

Requirements

SYSTEM REQUIRE	MENTS			
Operating System	Windows, Mac OS, Ubuntu, or CentOs			
PHP	The opensslextension must be enabled for downloading files with HTTPS.			
Java, version 1.6 or later	To determine your current version of Java, enter the following at the command line:			
	java -version			
	If Java isn't recognized, make sure the java and jar executables are in your system PATH. To learn more, see: Installing Java			
	Using Java			
Magento	Magento URLs must not include a secret URL key. To verify the configuration, do the following:			
	1. Log in to the Magento Admin with administrator privileges.			
	2. On the Admin menu, select System > Configuration .			
	 In the panel on the left under Advanced, select Admin. Then, click to expand the Security section. 			
	4. Set Add Secret Key to URLs to "No."			
	5. Click Save Config.			
Git	Git must be installed.			
	(Windows Only) Add Git to your system PATH variable, or run Composer from the Git bash shell.			
Browser	If using a browser other than Firefox, download drivers that are compatible with Selenium. To learn more, see the Selenium Documentation.			
	The browser must also be declared in the config.xmlfile. For an example, see: Non-Firefox Browsers.			

Installation

- **1.** Download Composer for UNIX or Windows. Then, follow the instructions to install Composer.
- Run Composer from the [Magento install]/dev/tests/functional directory as follows:

composer install

If you cannot run composer from the command line, do the following:

a. Copy composer.phar to the same directory where composer.json is located. The typical location is:

[Magento install dir]/dev/tests/functional

The composer.json file contains dependency information and settings for PHPUnit, Selenium server, libraries, and so on, and is required to start MTF. It checks out MTF from a separate repository.

b. Run Composer as follows:

php composer.phar install

A new directory named vendor is created with the checked-out MTF. The vendor directory contains:

- An MTF framework directory (magento/mtf)
- bin
- composer
- netwing
- phpunit
- symfony
- autoload.php (file)
- **3**. To run the generator, do one of the following:
 - Use your browser to navigate to the following location:

```
[Magento install dir]/dev/tests/functional/utils/generate.php
```

• Execute the following from the command line:

```
php utils/generate/factory.php
```

The generator tool creates generated directories with factories for pages, blocks, handlers, fixtures and repositories. After MTF is initialized, the factories are pre-generated to facilitate creating and running tests.

Configuration

Non-Firefox Browsers

If using a browser other than Firefox, you must first download drivers that are compatible with Selenium. Then, add the following declaration to the config.xml file. The file is is located at:

[Magento install]/dev/tests/functional/etc/config.xml

To learn more, see the Selenium Documentation.

Magento URLs

Update the phpunit.xml file with the URLs of your storefront and Magento Admin as follows:

```
<env name="app_frontend_url"
value="http://localhost/magento2/index.php/"/>
<env name="app_backend_url"
value="http://localhost/magento2/index.php/backend/"/>
```

Configuration Reference

This reference provides information about each MTF configuration section located at:

[Magento install dir]/dev/tests/functional/etc/config.xml

application

Provides the login credentials for the Magento Admin.

Sample

<application></application>					
<reopenbrowser>testCase</reopenbrowser>					
<pre><backendlogin>admin</backendlogin></pre>					
<pre><backendpassword>123123q</backendpassword></pre>					
<pre><backendloginurl>admin/auth/login</backendloginurl></pre>					

ELEMENT	DESCRIPTION	
reopenBrowser	Determines if the browser is reopened either before every test, or before every test case. The default behavior is for the browser to open before every test case.	
backendLogin	The user name of the Magento Admin administrator.	
backendPassword	The password of the Magento Admin administrator.	
backendLoginUrl	The URL of the Magento Admin Login page.	

isolation

Specifies the isolation strategies for tests, cases, and suites.

Sample

```
<isolation>
</resetUrlPath>dev/tests/mtf/isolation.php</resetUrlPath>
</resetSuite>before</testSuite>
</resetCase>none</testCase>
</resetCase>none</test>
</resetSuite>
```

Your isolation strategy determines when the system returns to its initial state. An isolation strategy can apply to any scope, such as a test, case, or suite. The following four isolation strategies are available:

Isolation Strategies

STRATEGY	DESCRIPTION
none	(Default) Specifies that the isolation script is not to be run before or after any test, case, or suite
before	Specifies that the isolation script is to be run before a test, case, or suite.
after	Specifies that the isolation script is to be run after a test, case, or suite.
both	Specifies that the isolation script is to be run both before and after a test, case, or suite.

server

Specifies the Selenium web browser (if not Firefox) and other options. For a list of valid browserName values, see:

- Selenium source code
- List of Selenium RC Browser Launchers

Sample

Running MTF

- 1. Make sure your Magento code is up to date.
- 2. Change to the dev/tests/functional directory, and run composer update to update any dependencies that might prevent tests from running successfully.

composer update

3. Start Selenium. Selenium was downloaded by Composer, and can be found in the following directory:

```
dev/tests/functional/vendor/netwing/selenium-server-standalone
```

Example

```
java -jar vendor/netwing/selenium-server-standalone/selenium-server-
standalone-2.39.0.jar
```

4. Start your tests using PHPUnit, using your integrated development environment (IDE), or from the command line.

Example

cd dev/tests/functional phpunit

Frequently Asked Questions

- Q: We want to run tests on a custom website. The tests assume that the main website is called "Main Website," and do not work. Is there a way to provide a custom name without changing the tests?
- A: This is an error in the tests. Instead of "Main Website," it should be set to main_website, which will select the default website. The website_selection_patch will be included in next MTF release.
- Q: I get errors in Mage\Adminhtml\Test\TestCase\CreateWebsiteEntityTest. How can I fix it?
- A: This is an misconfiguration in the test, which was designed for an internal workflow. The website patch addresses this issue.

You might also try this as an alternate solution. In the following file:

```
dev\tests\functional\tests\app\Mage\Adminhtml\Test\Constraint\
AssertProductIsPresentOnCustomWebsite.php
```

Change line 115 to:

\$this->magentoRoot = realpath(MTF_BP . '/../../');

- Q: I get errors in Mage\Adminhtml\Test\TestCase\CreateStoreEntityTest. How can I fix it?
- A: This test fails due to lack of translations. Install translations into Magento.

Q: I get errors while testing a custom website.

- A: One possible reason is that translations enabled. The tests expect to find English text on the page. Change the default language to English on the website that is being tested.
- Q: Why are some of tests so slow, especially when comparing the default address with the data sets?
- A: This is caused by the way the Selenium server processes the SELECT statement. The next version should address this issue.

- Q: Some of the tests are very slow, especially when choosing a category for a newly added product. This process slows down when there are a lot of categories.
- A: This is caused by the algorithm that prepares the tree:

\Magento\Mtf\Client\Element\TreeElement

The next version should address this issue.

- Q: How can I create tests that extend an existing module? For example, how do we add new attributes and assertions to customer tests?
- A: See this customer attribute example and instructions.
- Q: How can I create tests for a responsive theme or for any other custom theme?
- A: See this custom theme example and instructions.



Appendices

In this section...

Glossary

Editor Toolbar

Release Notes

Patch Releases

Configuration Reference

Change Log



APPENDIX A: Glossary

Α

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.

С

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.

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.

Ε

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.

Н

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.

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.

Κ

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.

Μ

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

Ν

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.

0

opt-in

The process by which a user consents to receiving emails from an online store.

Ρ

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.

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.

Х

XML

Extensible Markup Language: A markup format derived from SGML that it used to format information for publication and distribution.



APPENDIX B: Editor Toolbar

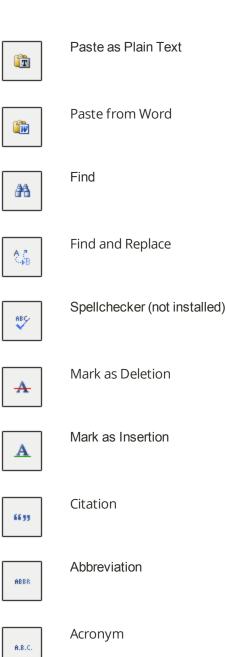


Editor Toolbar

Editing Tools



Editing Tools



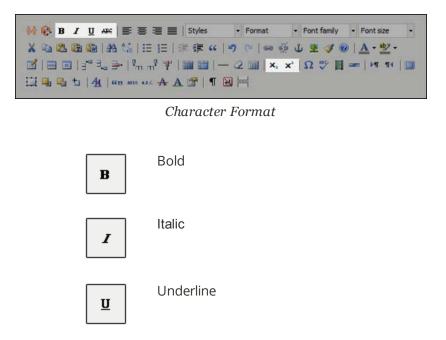
Styles and Fonts

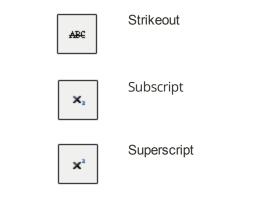


Styles and Fonts

Styles 🔻	Styles
Format -	Format
Font family 🔻	Font Family
Font size 🔻	Font Size

Character Format

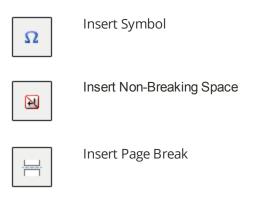




Special Characters



Special Characters



Color



Color

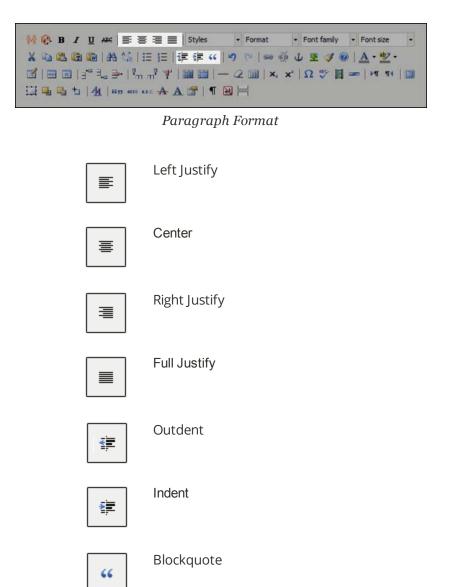


Select Text Color



Select Background Color

Paragraph Format



Coding Tools



Coding Tools

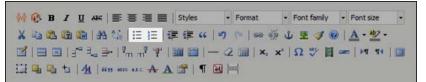


Remove Formatting



Cleanup Messy Code

Lists



Lists



Bulleted (Unordered) List



Numbered (Ordered) List

Rules



Rules



Insert Simple Horizontal Rule



Insert Formatted Horizontal Rule

Links and Anchors

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Links and Anchors



Images and Media



Images and Media

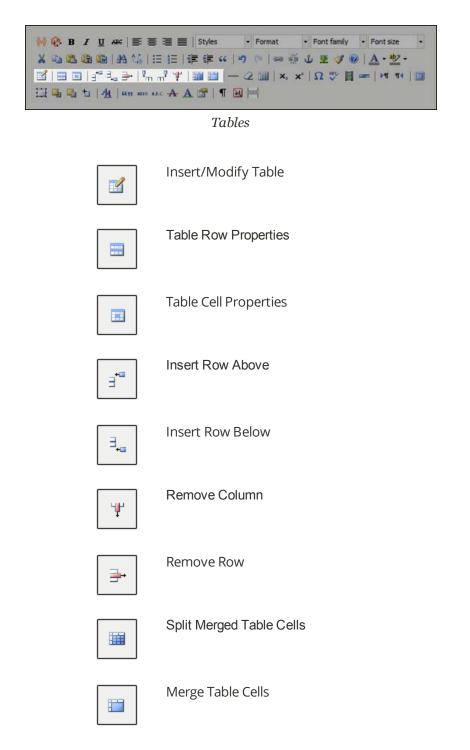


Insert/Edit Image



Insert Media

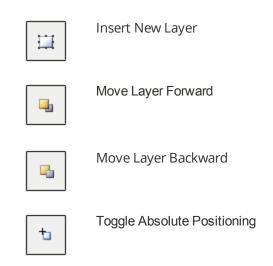
Tables



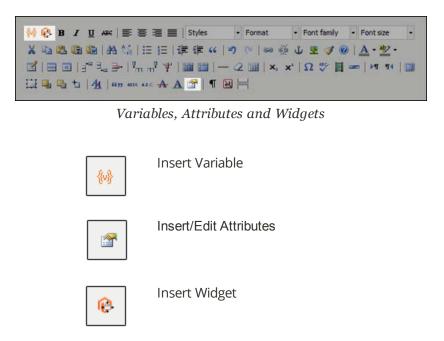
Layers



Layers



Variables, Attributes and Widgets



Workspace Preferences



Workspace Preferences

	Toggle Fullscreen Mode
¶	Display Visual Control Characters (On/Off)
Ī	Toggle Guidelines / Invisible Elements
▶ ¶	Set Typing Direction Left-to- Right



Set Typing Direction Right-to-Left



Help



APPENDIX C: Release Notes

Magento Community Edition 1.9.2

We are pleased to bring to you Magento Community Edition, 1.9.2, which provides merchants with many enhancements that make it easier to build and maintain a high quality and secure site.

Important! Use Magento Community 1.9.0 or later for all new installations and upgrades to ensure that you get the latest fixes, features, and security updates.

Solutions for Developers

Magento Community Edition 1.9.2 includes the latest versions of the Zend 1 Framework and Redis integration, as well as refinements to full-page caching that enable more pages to be served from cache. In addition, this release includes many enhancements as part of our commitment to continually improve product quality and to integrate previous patches into the core code.

Magento Test Framework

This release of Magento Community Edition 1.9.2 includes an automated testing framework with nearly 170 automated functional tests. Developers can use the Magento Test Framework (MTF) to improve the quality and time to market of implementations, and to perform basic acceptance testing of extensions, customizations, and upgrades. To learn more, see: Magento Test Framework.

Translations are available separately on the Support and Partner portals.

Other Performance Improvements

- Addressed performance degradation with downloadable products.
- Numerous performance enhancements.¹ and ²

Security

SUPEE-6285 Patch Bundle

This bundle includes protection against the following security-related issues:

Customer Information Leak via RSS and Privilege Escalation

PATCH DETAILS	
Туре:	Privilege Escalation / Insufficient Data Protection
CVSS Severity:	7.5 (high)
Known Attacks:	None
Description:	Improper check for authorized URL leads to customer information leak (order information, order IDs, customer name). Leaked information simplifies attack on guest Order Review, which exposes customer email, shipping and billing address. In some areas, the same underlying issue can lead to privilege escalation for Admin accounts.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Erik Wohllebe

Request Forgery in Magento Connect Leads to Code Execution

PATCH DETAILS	
Туре:	Cross-site Request Forgery
CVSS Severity:	9.3 (Critical)
Known Attacks:	None
Description:	Cross-site request forgery in Magento Connect Manager allows an attacker to execute actions such as the installation of a remote module that leads to the execution of remote code. The attack requires a Magento store administrator, while logged in to Magento Connect Manager, to click a link that was prepared by the attacker.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.

PATCH DETAILS	
Fixed In:	CE 1.9.2.0
Reporter:	Nicolas Melendez

Cross-site Scripting in Wishlist

PATCH DETAILS	
Туре:	Cross-site Scripting
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	This vulnerability makes it possible to include an unescaped customer name when Wishlist are sent. By manipulating the customer name, an attacker can use the store to send spoofing or phishing emails.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Bastian Ike

Cross-site Scripting in Cart

PATCH DETAILS	
Туре:	Cross-site Scripting (XSS)
CVSS Severity:	6.1 (Medium)
Known Attacks:	None
Description:	The redirection link on an empty cart page uses non-validated user input, which makes it possible to use URL parameters to inject JavaScript code into the page.
	Cookies and other information can be sent to the attacker, who is impersonating a customer.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Hannes Karlsson

PATCH DETAILS	
Туре:	Information Leakage (Internal)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	Directly accessing the URL of files that are related to Magento Connect produces an exception that includes the server path. The exception is generated regardless of the configuration settings that control the display of exceptions. There is a low risk of attackers gaining a sufficient understanding of the site structure to target an attack.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Ryan Satterfield

Store Path Disclosure

Permissions on Log Files too Broad

PATCH DETAILS	
Туре:	Information Leakage (Internal)
CVSS Severity:	3.8 (Low)
Known Attacks:	None
Description:	Log files are created with permission settings that are too broad, that allows them to be read or altered by another user on the same server. The risk of an internal information leak is low.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Ryan Satterfield

Cross-site Scripting in Admin

PATCH DETAILS	
Туре:	Cross-site Scripting
CVSS Severity:	6.5 (Medium)

PATCH DETAILS	
Known Attacks:	None
Description:	An attacker can inject JavaScript into the title of a Widget from the Magento Admin. The code can be later executed when another administrator opens the Widget page.
	The risk requires the attacker to have administrator access to the store. However, when executed, the attacker can take over other administrator accounts.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Sasi Levi

SUPEE-5344 Patch

Magento Community Edition 1.9.2 provides protection against a specific remote code execution (RCE) vulnerability known as the "shoplift bug," that allows hackers to obtain Admin access to a store.

SUPEE-5994 Patch Bundle

This bundle includes protection against the following security-related issues:

Admin Path Disclosure

PATCH DETAILS	
Туре:	Information Leakage (Internal)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	An attacker can force the Admin Login page to appear by directly calling a module, regardless of the URL. This exposes the Admin URL on the page, and makes it easier to initiate password attacks.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Peter O'Callaghan

PATCH DETAILS	
Туре:	Information Disclosure / Leakage (Confidential or Restricted)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	Enables an attacker to obtain address information (name, address, phone) from the address books of other store customers.
	During the checkout process, the attacker can gain access to an arbitrary address book by entering a sequential ID. No payment information is returned. The only requirement for the attacker is to create an account in store, put any product into the cart, and start the checkout process.
	This attack can be fully automated, and a functional proof of concept exists.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Erik Wohllebe

Customer Address Leak through Checkout

Customer Information Leak through Recurring Profile

PATCH DETAILS	
Туре:	Information Disclosure / Leakage (Confidential or Restricted)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	This issue enables attacker to obtain address (name, address, phone), previous order (items, amounts) and payment method (payment method, recurrence) information from the recurring payment profiles of other store customers.
	The attacker just create an account with the store. While viewing own recurring profile, the attacker can request an arbitrary recurring profile using a sequential ID. The information is then returned to the attacker.
	This attack can be fully automated, and a manual proof of concept exists.

PATCH DETAILS	
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Manuel Iglesias

Local File Path Disclosure Using Media Cache

PATCH DETAILS	
Туре:	Information Leakage (Internal)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	Attacker can use fictitious image URLs to generate exceptions that expose internal server paths, regardless of settings.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Omar M

Cross-site Scripting (XSS) Using Magento Downloader

PATCH DETAILS	
Туре:	Cross-site Scripting (XSS)
CVSS Severity:	8.2 (High)
Known Attacks:	None
Description:	This issue enables an attacker to execute JavaScript code within the context of a Magento Connect Manager session. If the administrator clicks a malicious link, the session can be stolen, and malicious extensions installed.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Robert Foggia / Trustwave

Spreadsheet Formula Injection

PATCH DETAILS	
Туре:	Formula Injection
CVSS Severity:	6.1 (Medium)
Known Attacks:	None
Description:	Attacker can provide input that executes a formula when exported and opened in a spreadsheet such as Microsoft Excel. The formula can modify data, export personal data to another site, or cause remote code execution. The spreadsheet usually displays a warning message, which the user must dismiss for the attack to succeed.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	iSec Partners (external audit)

Cross-site Scripting Using Authorize.Net Direct Post Module

PATCH DETAILS	
Туре:	Cross-Site Scripting (XSS)
CVSS Severity:	6.1 (Medium)
Known Attacks:	None
Description:	Enables an attacker to execute JavaScript in the context of a customer session. If a customer clicks a malicious link, the attacker can steal cookies and hijack the session, which can expose personal information and compromise checkout.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Matthew Barry

Malicious Package Can Overwrite System Files

PATCH	DETAILS

Type:

Abuse of Functionality

PATCH DETAILS	
CVSS Severity:	3.1 (Low)
Known Attacks:	None
Description:	Attacker can publish a malicious extension package. When the package is installed by a customer, it can overwrite files on the server. The attacker must first publish a package, and then entice a customer to install it. The package might contain a malicious load, as well.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	iSec Partners (external audit)

APPSEC-996 Patch

Customer Information Leak via RSS and Privilege Escalation

PATCH DETAILS	
Туре:	Privilege Escalation / Insufficient Data Protection
CVSS Severity:	7.5 (High)
Known Attacks:	None
Description:	Improper check for authorized URL leads to customer information leak (order information, order IDs, customer name). Leaked information facilitates an attack on guest order review, exposing customer email, and the shipping and billing addresses. The same underlying issue makes it possible for someone with limited Admin access to escalate their privileges in order to gain access to other areas of the Admin.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Erik Wohllebe

Additional Security Enhancements

- Access Control List (ACL) nodes without value are now set to DENY access by default.
- Admin passwords now expire at the specified time.
- Cross-site request forgery (CSRF) protection issue that interfered with Varnish caching resolved.
- Cross-site scripting (XSS) exploit that used CACHED_FRONT_FORM_KEY resolved.
- Data deserialization potential exploits resolved.³
- .htaccess added to the shell subdirectory.4
- JavaScript injection potential exploit of the Wishlist resolved.
- Log permissions more restrictive.
- Pages served using the HTTPS protocol now POST using HTTPS.
- PHP bug in libxml that could cause the site to crash resolved.
- Recurring profiles reinforced against unprivileged access.
- Remote code execution potential exploits resolved.⁵
- REST configuration reinforced against unprivileged access.
- SQL injection potential vulnerabilities related to Advanced Search resolved.
- Widget title is escaped correctly.

Changes in This Release

- Access Control List (ACL) resources have new resources enabled.
- Cron jobs now execute at the time they were created, rather than the order in which they were created.
- Google Universal Analytics now includes information about customer orders. The configuration has been streamlined, and includes two account types: Google Analytics and Universal Analytics.
- Internet Protocol version 6 (IPv6) addressing is now supported.
- Magento can now be updated from Magento Connect Manager.
- Prices can be saved with a comma to separate thousands.
- Products can be downloaded over HTTPS.
- Redis integration has been updated to the latest version.⁶
- XMLConnect module has been updated to ver. 24. The module should be delivered in the "disabled" state.
- Zend framework has been updated to ver. 1.12.10.

Miscellaneous Fixes

API

- OAuth log in page now includes the form key field.
- REST call to Mage_Sales_Model_Order no longer returns errors.
- SOAP API correctly populates the min_sale_qty field.
- When a partial invoice is created using SOAP V2, salesOrderInvoiceCreate no longer changes the value of <code>\$itemsQty</code> in subsequent orders.
- Additional fields in the SOAP API CategoryInfo method: Include_in_menu UseParentSettings ApplyToProducts
- SOAP WSDL URL (/api/v2_soap?wsdl) no longer appears the Admin, which is unreachable by SOAP.

Attributes

- Duplicate attribute sets no longer appear if they are several pages long.
- Product Visibility set to "Search" works correctly.

Checkout

- Resolved JavaScript errors related to one-page checkout.
- Regions appear in alphabetical order on the checkout page.

Compiler

• Customers can register for an account and complete checkout while the compiler is running.

Cookies

• The correct content appears in the storefront when the store cookie is set.

CMS

- Widgets can be added to CMS pages.
- Resolved issues uploading images from the WYSIWYG editor.
- Thumbnails now appear in the WYSIWYG editor.
- CMS pages that use the Generic Content layout appear normally.
- The CMS Preview page uses the current theme.

Customers

- The customer's middle name or initial appears in both the Admin and storefront.
- When customers log in to their accounts, the account page appears instead of the last page visited.
- Saving a customer account from the Admin no longer returns an error.
- If the customer locale does not require a postal code, the administrator does not have to enter one.
- In the password reset notification, customer can reset their passwords for the correct store view.
- The dates that customers and customer addresses were created are now correct. This fix does not apply to customers or addresses created in earlier versions. Only customers and addresses created with Magento Community ver. 1.9.2 show the correct dates.

Database

- Deleting large numbers of products from the Admin no longer returns SQLSTATE errors.
- Disabled products no longer appear in the flat catalog table.
- Resolved an issue that caused the core_cache_tags database table to grow in size.

Import/Export

- Dataflow now exports products in which images are not used as media attributes.
- Importing and exporting postal codes with a wildcard (*) works correctly.
- Custom options are preserved during import.
- Product imports no longer change the Visibility setting.

Indexers

- Reindexing flat catalog category data issue resolved.
- The Updated at value for all indexers now shows the correct date and time.
- Reindexing from the command line no longer returns errors in system.log.
- Duplicate values for multi-select attributes no longer return errors when reindexed.

Magento Connect

- You can now install extensions without errors using the Database Backup option.
- Fixed potential issues with extensions.

Newsletters

- Customers who use the same email address to subscribe to multiple newsletters now receive all newsletters to which they are subscribed.
- When an order is placed, customers who use the same email address to register with two websites no longer receive notification that they have unsubscribed from a newsletter.

Order Processing

- Address validation has been enhanced.
- Printed invoices show the correct price for bundle products.
- Issues with FedEx error code handling resolved. Choosing FedEx during checkout does not cause a fatal error.
- Orders can be viewed from the Admin without triggering an error.
- The percent (%) symbol can be used in order comments. Previously, the percent symbol interfered with the display of order comments.
- The Fetch button works correctly for Authorize.Net Direct Post.

PHP

• You can change the value of php_value memory_limit in .htaccess without encountering "out of memory" errors.

Price

- You can change the price of a product using the website scope without errors.
- Added validation to make sure the special price is not greater than the actual price.

Products

- Alerts can be sent for configurable products.
- Error when saving a product no longer causes errors for other products you try to save.
- The Add New Review link works correctly with multiple stores.

Promotions

• Resolved a performance issue related to catalog price rules with a large number of configured quotes.

Reports

- The correct date appears in reports that are configured to run for a month or a year.
- The Bestseller section of the Dashboard displays the correct prices.
- The Sales Orders report displays the correct profit calculation result.

Server

• Rollback now completes without error when running PHP 5.5.

Shopping Cart

- A message appears when you add an item to your shopping cart.
- Customers can move unconfigured items from the Wishlist to the shopping cart without encountering an error.

• Customers can edit Custom Options in a shopping cart without issues.

Storefront

• Recently Viewed items appear correctly in the storefront.

Swatches

• Swatch images no longer change size when clicked in search results.

Themes

• Fixed responsive theme display problem with ZIP/Postal Code field.

Translations

- Implemented correct escape character for translations.
- International characters can now be used in a Magento storefront domain.⁷
- Resolved issues with inline translation links and the Chrome browser.
- Corrected the spelling of the Austrian province Vorarlberg.
- Corrected missing translation of a shipping method error message.
- Chinese locales now appear in the Interface Locale list.

Acknowledgments

We'd like to thank the following members of the Magento Community for their contributions to this release:

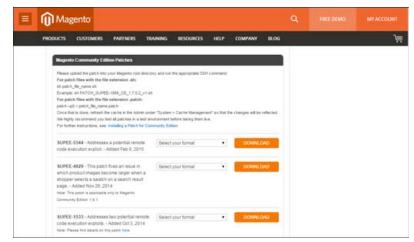
- ¹ Performance enhancements, Thomas Birke
- ² Performance enhancements, Ivan Chepurnty
- ³ Resolution of data deserialization exploit, Matthew Berry
- ⁴ Added .htaccess to shell subdirectory, Phillip Jackson
- ⁵ Resolution of remote code execution exploits, Netanel Rubin
- ⁶ Updated Redis integration, Colin Mollenhour
- ⁷ International characters in storefront domain, Yihao Peng



APPENDIX D: Patch Releases

As part of our ongoing commitment to excellence in platform security and performance, we periodically release patches that address specific issues and update the code. As patches become available, we post notification to your Admin Inbox, on the Download page of the Magento site, and through our merchant and partner portals. For security-related issues, registered customers also receive notification by email.

We recommend that you install any security-related patch as soon as possible. For step-by-step instructions, see: Installing Magento Patches. For a list of all available patches by version, see the Magento Community Edition Patches section of the download page.



Magento Community Edition Patches

2015 Patches

SUPEE-5994 Patch Bundle

Date of Release: 05/14/2015

SUPEE-5994 is a bundle of eight patches that resolves the following security-related issues. The patch can be downloaded from the Magento Community Downloads page.

Admin Path Disclosure

PATCH DETAILS	
Туре:	Information Leakage (Internal)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	An attacker can force the Admin Login page to appear by directly calling a module, regardless of the URL. This exposes the Admin URL on the page, and makes it easier to initiate password attacks.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Peter O'Callaghan

Customer Address Leak through Checkout

PATCH DETAILS	
Туре:	Information Disclosure / Leakage (Confidential or Restricted)
CVSS Severity:	5.3 (Medium)
Known Attacks:	None
Description:	Enables an attacker to obtain address information (name, address, phone) from the address books of other store customers.

PATCH DETAILS	
	During the checkout process, the attacker can gain access to an arbitrary address book by entering a sequential ID. No payment information is returned. The only requirement for the attacker is to create an account in store, put any product into the cart, and start the checkout process.
	This attack can be fully automated, and a functional proof of concept exists.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	Erik Wohllebe

Customer Information Leak through Recurring Profile

PATCH DETAILS					
Туре:	Information Disclosure / Leakage (Confidential or Restricted)				
CVSS Severity:	5.3 (Medium)				
Known Attacks:	None				
Description:	This issue enables attacker to obtain address (name, address, phone), previous order (items, amounts) and payment method (payment method, recurrence) information from the recurring payment profiles of other store customers.				
	The attacker just create an account with the store. While viewing own recurring profile, the attacker can request an arbitrary recurring profile using a sequential ID. The information is then returned to the attacker.				
	This attack can be fully automated, and a manual proof of concept exists.				
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.				
Fixed In:	CE 1.9.2.0				
Reporter:	Manuel Iglesias				

Local File Path Disclosure Using Media Cache

PATCH DETAILS				
Туре:	Information Leakage (Internal)			
CVSS Severity:	5.3 (Medium)			
Known Attacks:	None			
Description:	Attacker can use fictitious image URLs to generate exceptions that expose internal server paths, regardless of settings.			
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.			
Fixed In:	CE 1.9.2.0			
Reporter:	Omar M			

Cross-site Scripting (XSS) Using Magento Downloader

PATCH DETAILS				
Туре:	Cross-site Scripting (XSS)			
CVSS Severity:	8.2 (High)			
Known Attacks:	None			
Description:	This issue enables an attacker to execute JavaScript code within the context of a Magento Connect Manager session. If the administrator clicks a malicious link, the session can be stolen, and malicious extensions installed.			
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.			
Fixed In:	CE 1.9.2.0			
Reporter:	Robert Foggia / Trustwave			

Spreadsheet Formula Injection

PATCH DETAILS	
Туре:	Formula Injection
CVSS Severity:	6.1 (Medium)

PATCH DETAILS			
Known Attacks:	None		
Description:	Attacker can provide input that executes a formula when exported and opened in a spreadsheet such as Microsoft Excel. The formula can modify data, export personal data to another site, or cause remote code execution. The spreadsheet usually displays a warning message, which the user must dismiss for the attack to succeed.		
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.		
Fixed In:	CE 1.9.2.0		
Reporter:	iSec Partners (external audit)		

Cross-site Scripting Using Authorize.Net Direct Post Module

PATCH DETAILS					
Туре:	Cross-Site Scripting (XSS)				
CVSS Severity:	6.1 (Medium)				
Known Attacks:	None				
Description:	Enables an attacker to execute JavaScript in the context of a customer session. If a customer clicks a malicious link, the attacker can steal cookies and hijack the session, which can expose personal information and compromise checkout.				
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.				
Fixed In:	CE 1.9.2.0				
Reporter:	Matthew Barry				

Malicious Package Can Overwrite System Files

PATCH DETAILS	
Туре:	Abuse of Functionality
CVSS Severity:	3.1 (Low)

PATCH DETAILS	
Known Attacks:	None
Description:	Attacker can publish a malicious extension package. When the package is installed by a customer, it can overwrite files on the server. The attacker must first publish a package, and then entice a customer to install it. The package might contain a malicious load, as well.
Product(s) Affected:	Magento CE prior to 1.9.2.0, and all versions of EE.
Fixed In:	CE 1.9.2.0
Reporter:	iSec Partners (external audit)

APPSEC-919

Date of Release: 04/19/2015

This patch is currently required for all versions of Magento CE prior to 1.9.1.1, and for all versions of Magento Enterprise.

Remote Code Execution	Using Authentication	Bypass /	SQL Injection
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PATCH DETAILS					
Туре:	Remote Code Execution				
CVSS Severity:	9.1 (Critical)				
Known Attacks:	Yes				
Description:	Authentication bypass using special parameter that allows execution of Admin action. Admin action is vulnerable to SQL injection, and allows code to be inserted into the database and executed. As a result, a store can be fully compromised by the creation of counterfeit administrator accounts and/or the installation of malware on the server.				
Product(s) Affected:	All versions of Magento CE prior to 1.9.1.1, and all Magento EE.				
Fixed In:	CE 1.9.1.1				
Reporter:	Netanel Rubin				

SUPEE-5344 Patch

Date of Release: 02/19/2015

This patch addresses a specific remote code execution (RCE) vulnerability known as the "shoplift bug" that allows hackers to obtain Admin access to a store. To determine if your store has been patched, see the Shoplift Bug Test. If your store is not protected, you must immediately download and install the appropriate patch for your version of Magento Community:

• Magento Community Edition, all versions prior to 1.9.2

lotes	



APPENDIX E: Configuration Reference

This online reference has field descriptions for each section of the configuration. Drill down through any section, and click a link to jump to the corresponding topic in the user guide.

- General
- Catalog
- Customers
- Sales
- Services
- Advanced

Notes		



APPENDIX F: Change Log

Our documentation is continually updated with new topics, and corrections or clarifications made to existing content. This change log lists the major updates, organized by month. Check back every now and then, to see what's new!

If you can't see the most recent changes, refresh your browser or clear the cache.

July, 2015

CHANGE	DESCRIPTION	
New Topics Related to	Release Notes: Magento Community Edition, ver. 1.9.2	
this Release	Security Best Practices	
	Magento Test Framework	
Updated Topics Related to this Release	About this Release	An overview of this release.
Other New Topics	Changing UI Text	
	Index Configuration	
Other Updated Topics	Resources	Added Security Center.
	Join the Conversation!	Added Google+.
	Patch Releases	All Magento CE installations prior to 1.9.2 must have SUPEE-5344 installed.

June, 2015

CHANGE	DESCRIPTION	
New Topics	Solution Series: Installing Magento Patches	
	Product List on Home Page	
	My Account	

June, 2015 (cont.)

CHANGE	DESCRIPTION	DESCRIPTION	
Solution Series	member posts to the M solutions and insight free	Articles in the <i>Solution Series</i> are inspired by community member posts to the Magento Forum, and offer practical solutions and insight from a real-world perspective. Installing Magento Patches is the first article in the series.	
Updated Topics	Creating a Page	Added a step that explains how to select the CMS page that is used as the home page.	
	(All section pages)	Added links to chapters in section.	

May, 2015

CHANGE	DESCRIPTION	
New Topics Related to this Release	Release Notes: Magento Community Edition, ver. 1.9.1.1	
	Installing a Patch	
Updated Topics Related to this Release	About this Release	An overview of this release.
New Section	Configuration Reference	The configuration reference has field descriptions for every setting, with links to the corresponding topic.
Other New Topics	Adding a Language	
	Basic Shipping Settings	
	Browser Capabilities Detection	
	Changing UI Text	
	Currency	
	Currency Rates (new chapter)	
	Currency Symbols	
	Customer Account C	Configuration
	Customer Account Login	
	Customer Account Scope	
	CSS Sattings	

CSS Settings

May, 2015 (cont.)

CHANGE	DESCRIPTION		
	Date & Time Custom Options		
	Default Pages		
	Google Universal An	alytics	
	 Google Sitemap Configuration JavaScript Settings Login Landing Page Minimum Order Amount Name and Address Options 		
	Notification Setup		
	Pagination Controls		
	Password Options		
	 Product List Configuration Updating Currency Rates Using a Custom Admin URL Session Validation Shipping Tax Class Store Information (see Store Details below) 		
	Store URLs		
	Theme Assets		
	Translating Pages		
	Translating Products		
Other Updated Topics	Add Reference IDs to Header	Added instructions to show customer IP address, and changed the title from "Include Order ID."	
	Automatic Indexing	Added section about how to avoid conflict with multiple users.	
	Cookie Restriction Mode	Added how to avoid a "404 Page Not Found" error if the URL key of the Privacy Policy is changed.	

May, 2015 (cont.)

CHANGE	DESCRIPTION	
	Currency Setup	Moved to new Currency Rates chapter. Added currency chooser, price scope, and import currency rates configuration.
	Custom Rewrite	Added an example of how to redirect the Privacy Policy is the URL key is changed.
	Email a Friend	Added configuration instructions.
	Google Shopping	Moved to Sales Channels section.
	Image Size and Type	Added image configuration instructions.
	Importing Product Images	Added two methods, and refer to detailed instructions in Dataflow.
	Marketing & Promotions	Changed name of this section from "Marketing" to "Marketing & Promotions."
	PayPal Payments Advanced	Added detailed setup instructions to the online topic.
	PayPal Express Checkout	Added detailed setup instructions to both the online and PDF topics.
	PayPal Payments Pro	Added detailed setup instructions to the online topic.
	PayPal Payments Standard	Added detailed setup instructions to the online topic.
	Privacy Policy	Added how to change the URL key of the Privacy Policy CMS page.
	Product Reviews	Added configuration to allow guest reviews.
	Resources	Added new Documentation page, and removed Knowledge Base and Wiki.

CHANGE	DESCRIPTION	
	Search Results	Moved Page Controls to Product List Configuration.
	Setting Up Catalog URLs	Updated content.
	Shipping Settings	Moved to Shipping chapter.
	Store Details	Renamed this chapter from "Store Information."
	Store Information	Added this configuration section to the Store Details chapter.
	Your Magento Account	Updating the instructions, and added instructions to reset your password.

May, 2015 (cont.)

March, 2015

CHANGE	DESCRIPTION
New Topics	Base URLs
	Canada: Example Configurations
	Category Levels
	Change Log
	• Cron
	Dataflow
	EU: Example Configurations
	EU Place of Supply
	Import/Export Tax Rates
	International Tax Configurations
	Media Storage
	PDF Invoice with Logo
	Prelaunch Checklist
	Release Notes
	Sales Document Setup

CHANGE	DESCRIPTION	
	Tax Quick Reference	
	Tax Warning Messages	
	U. S. Recommendations	
Updated Topics	Dimensional Shipping	Reworked this topic to better describe how dimensional shipping is implemented by different carriers.
	Swatch Localization	Added more information about of how swatch labels are translated, with conversion examples and transliterated characters.
	Working with CSV Files	Added note to explain why Microsoft Excel shouldn't be used to edit CSV files. Replaced screenshots of Excel and Notepad with screenshots of OpenOffice Calc and Notepad++.
	Layout Updates	Moved the topics in this section from Content Elements chapter to Design & Theme.
	PayPal Topics	Added updated setup instructions (HTML only)
		PayPal Express Checkout
		PayPal Payments Standard
		PayPal Payments Advanced
		PayPal Payments Pro
New Features	Date Updated	The date last updated now appears in the footer of each topic. For the PDF guides, the date updated appears in the first footer of the table of contents.
	Change Log	This change log lists the recent changes made to the user guide.
	Design Changes	You'll notice a number of design changes, including new covers and section dividers for the PDF guides.



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