



# Magento<sup>®</sup> User Guide

From Getting Started... To Getting More From Your Store

**Magento Community**

Revised, Expanded, and Updated for Magento Community v1.7

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# About This Guide

Welcome to the Magento Community Edition User Guide, which provides an overview of the Magento Community Edition (CE) eCommerce platform developed by Magento, Inc.

This guide is intended for web storeowners and first-time users of Magento CE. It provides a quick guide through the most important steps for getting your web store up and running and ready for selling online. The options described in this user guide enable you to generate a feature-rich and attractive eCommerce interface without the need for advanced technical expertise.

This guide first introduces Magento CE and its key concepts, and then describes how to install Magento CE. The following two chapters introduce the daily experience that a customer can have in a Magento web store and the daily management tasks that a storeowner would perform.

The rest of the chapters that follow walk you through the process of setting up your Magento CE web store; customizing its behavior to your requirements; entering products; managing orders, invoices and shipments; and achieving the best turnover and profits from your web store.

The guide includes the following chapters:

- ❖ **Chapter 1** “Introducing Magento Community Edition,” page 3, introduces Magento CE and describes its basic components and the workflow for using it.
- ❖ **Chapter 2** “Installing Magento CE,” page 9, describes Magento CE system requirements and how to install and configure it.
- ❖ **Chapter 3** “Basic Configuration,” page 23, describes how to configure the basic information for your web store.
- ❖ **Chapter 4** “Introducing the Frontend,” page 39, describes the browsing and purchasing features provided for your customers by a web store created using Magento CE.
- ❖ **Chapter 5** “Introducing the Backend,” page 61, describes the ongoing management tasks that you can perform in the backend while running your Magento CE web store on a day-to-day basis.
- ❖ **Chapter 6** “Setting Up Your Catalog,” page 71, describes how to create a catalog for your Magento CE web store, how to add products and how to define attributes for them.
- ❖ **Chapter 7** “Setting Up Your Store Hierarchy,” page 129, describes how to prepare your web store to start selling products by defining tax charges and how products are shipped and funds accepted.
- ❖ **Chapter 8** “Taxes,” page 131, describes how to set up the automatic calculation of applicable transaction taxes.
- ❖ **Chapter 9** “Shipping,” page 139, describes how to configure shipping methods.
- ❖ **Chapter 10** “Payment,” page 145, describes various payment methods and how to configure them.

- ❖ **Chapter 11**, “Design and Content,” page 161, describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento CE backend.
- ❖ **Chapter 12**, “Promotions,” page 181, describes a variety of ways to promote your products.
- ❖ **Chapter 13**, “Managing Orders and Customers,” page 217, describes how to manage customers and orders from the backend.
- ❖ **Chapter 14**, “Managing Customer-Generated Content,” page 222, describes how to manage customer-generated content, such as ratings, reviews, tags, and polls.
- ❖ **Chapter 15**, “Monitoring and Improving the Web Store,” page 237, describes how to monitor and improve your store by defining reports, search terms, synonyms, redirects, and Google Analytics.
- ❖ **Chapter 16**, “Keeping Your Store Healthy,” page 243, describes how to keep your store healthy by using a staging environment, updating Magento CE, and extending Magento CE.
- ❖ **Chapter 17**, “Getting Help,” page 257, describes Magento's resources for providing you with help.

## Support and Contact Information

We at Magento are dedicated to providing our customers with the best possible service. We would love to hear from you.

For feedback on this book and all other inquiries, please use our contact form at:

<http://www.magentocommerce.com/company/contact-us/>

## Conventions Used in this Guide

The following style conventions are used in this document:

**Note:** This is a note.

**Tip:** This is a tip providing useful suggestions and information.

# 1 Introducing Magento Community Edition

This chapter introduces Magento Community Edition (CE), its basic components, and the workflow for using it.

## 1.1 What is Magento CE?

Magento CE is a feature-rich eCommerce platform, built on open-source technology that provides online merchants with unprecedented flexibility and control over the look, content, and functionality of their eCommerce store. Magento CE's intuitive administration interface 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.

## 1.2 Magento CE License

Magento CE is licensed under the Open Software License (OSL) v3.0, an open source certified license. More information about Magento's licenses can be found at <http://www.magentocommerce.com/license/>

## 1.3 Magento CE Frontend and Backend

The following sections provide an overview of the two visible interfaces of Magento CE: the frontend and the backend.

## Frontend (The Web Store Front)

The frontend is the public view of your web store with which your customers can interact through a standard web browser. It presents your products, product categories, and promotions, and provides your customers with ordering, payment, and purchase tracking features.

An example is shown in Figure 1.



Figure 1. Magento CE Frontend

## Backend (The Back Office)

The backend is the password-protected view of the back office features that enable a web store administrator to setup the products and purchasing options and to manage orders and all other store functionalities. You can navigate the Admin Panel using the menu on the top of the page (Magento top menu). A view of the backend is shown in Figure 2.

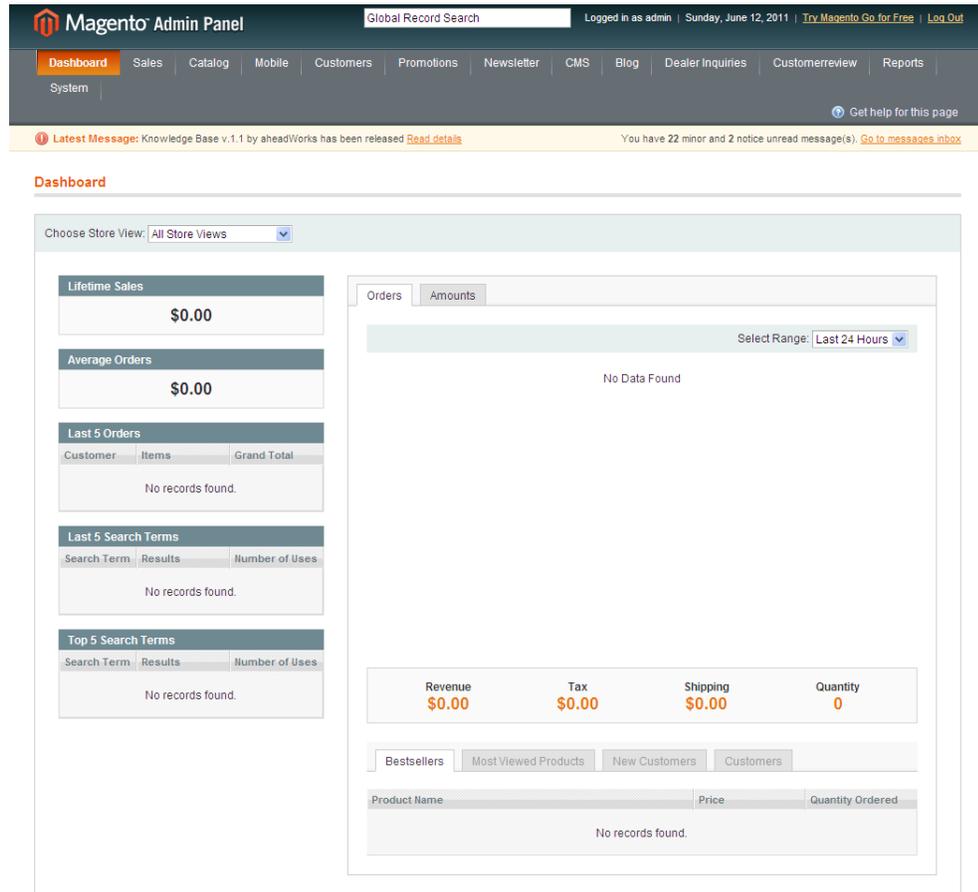


Figure 2. Magento CE Backend

### 1.4 Magento CE Concepts

To use Magento CE effectively, you should be familiar with the following terms and concepts.

**Attribute:** A characteristic of a product. For example, an attribute of a digital camera could be “resolution,” and the value of this attribute for a particular digital camera could be “10 megapixels.” Customers can filter a list of products by values of one or more attributes.

**Attribute Group:** A logical grouping of attributes within an attribute set.

**Attribute Set:** A collection of attributes, customized to fit a certain type of product. For example, if you sell several different kinds of T-shirts on your website, you can create the T-shirts attribute set which will include the simple attributes commonly shared by all of your T-shirts. This may include color, size, gender, and brand.

**Bundle product:** This product is composed of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

**Category:** A user-defined product classification. A category can have any number of levels of subcategories.

**Configurable product:** This product enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKU) and then add these six to a **configurable product** where customers can choose the size and color, and then add it to their cart.

**Credit memo:** A credit memo is a statement of credits; for example, a credit for returned merchandise generates a credit memo. According to your store policy, you can apply the credit to future orders or refund the customer's payment method.

**Cross-sell:** Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page, these products are displayed as cross-sells to the items already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

**Downloadable product:** A product, such as a media file, that the customer downloads from the store after purchase. These downloadable files can reside on your server or be provided as URLs to any other server.

**Grouped product:** This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a **grouped product** to display all four of these sizes. Customers can select the size(s) that they want and add them to the cart from this page.

**Invoice:** An invoice in Magento CE represents a confirmation of payment. More than one invoice can be associated with a single order. If the products in an order are shipped in multiple shipments, then an invoice is generated for each shipment for the products in that shipment.

**Order:** An order is a request for goods.

**Order status:** The order status indicates where it is in the order cycle. In Magento CE, the system order status values are the following:

- ❖ **Pending** - Pending orders are brand new orders that have not been processed. Typically, these orders need to be invoiced and shipped.

- ❖ **On Hold** - The user cannot proceed to order processing if the order is in this state. This is convenient if, for example, some data must be verified.
- ❖ **Pending PayPal** (possible for PayPal orders only) - Pending PayPal orders are brand new orders that have not been cleared by PayPal. When using PayPal as a payment method, customers are redirected to the PayPal website. If they have not paid for the order, orders will be marked as **Pending PayPal**. It is not recommended to process these orders without referencing PayPal first to see if payment has been made.
- ❖ **Payment Review** - As long as an external payment gateway is verifying the payment information from a sales order, the order is assigned the **Payment Review** status both in the payment system and in Magento CE.
- ❖ **Processing** - Processing means that the order has been either invoiced or shipped, but not both.
- ❖ **Suspected Fraud** (possible for PayPal orders only) – The order transaction did not pass one or more of the PayPal fraud filters and the system receives the response from PayPal that the transaction is under review by Fraud Service
- ❖ **Complete** - Orders marked as complete have fully been invoiced and have shipped.
- ❖ **Canceled** - The order can be of this status if the customer calls your web store and asks to cancel an order if the order has not been paid for.

The store administrator can create custom order statuses, assign them to order states and set default status values for order states.

**Product type:** Magento CE classifies products as one of several predefined product types: Simple Product, Virtual Product, Downloadable Product, Grouped Product, Configurable Product, Bundle Product.

**Related product:** Related products are offered to the customer for purchase in addition to the item that the customer is viewing.

**Scope:** Scope describes the extent of your store hierarchy to which a given setting is effective. A setting can have a scope of **Global** (all websites, stores, and store views), **Website** (the selected website and all stores and store views under it), **Store** (the selected store and all store views under it), and **Store View** (the selected store view). Some settings that are set at a higher level can be overridden at a lower level.

**Search Engine Optimization (SEO):** The set of techniques and strategies that ensure that your site is listed prominently in search engine results, thereby increasing the likelihood that customers will find your site.

**Simple product:** This is the most basic product type. It is suitable for all kinds of physical (shipped) products.

**Shipment:** A shipment is a record of the products in an order that have been shipped. More than one shipment can be associated with a single order.

**Shopping cart:** The set of products that a customer has selected to purchase, but has not yet purchased.

**Store:** The second level of your store hierarchy. A website can have multiple stores (each, potentially, with its own root category), and a store can have multiple store views.

**Store View:** The lowest level of your store hierarchy. Typically, a store view is created for each locale or language. All store views under a given store share the same catalog. Customers use a drop-down list on the frontend to switch from one store view to another.

**Tax rule:** A combination of a product tax class, customer tax class, and tax rate. This rule defines which tax calculation is applied.

**Up-sell:** An up-sell item is one that is offered to the customer as an alternative to the product the customer is viewing. These products may be more expensive, of higher quality, or more popular, or produce a higher profit margin.

**Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.

**Website:** The highest level of your store hierarchy. You can have multiple websites, and each website can have a different domain name. Websites can be set up to share customer data, or to not share data. Typically, each website has different lines of products and may have different customer bases.

## 1.5 Advanced Magento CE Customization Options

The options described in this user guide can get you up and running with an extremely feature-rich and attractive interface without the need for technical expertise.

If you would like to take your web store one step further, Magento CE provides a variety of advanced options for customizing the look-and-feel and functionality of your site.

These include:

- ❖ Custom Themes and Skins
- ❖ Extension Modules
- ❖ ...and more.

See the Magento website at <http://www.magentocommerce.com> for a description of these options, as well as for access to resources that can assist you with their implementation.

## 2 Installing Magento CE

This chapter describes Magento CE system requirements and how to download and install it.

### 2.1 System Requirements

The following provides a short list of the server requirements for running Magento CE properly. You can also view these specifications at:

<http://www.magentocommerce.com/system-requirements>.

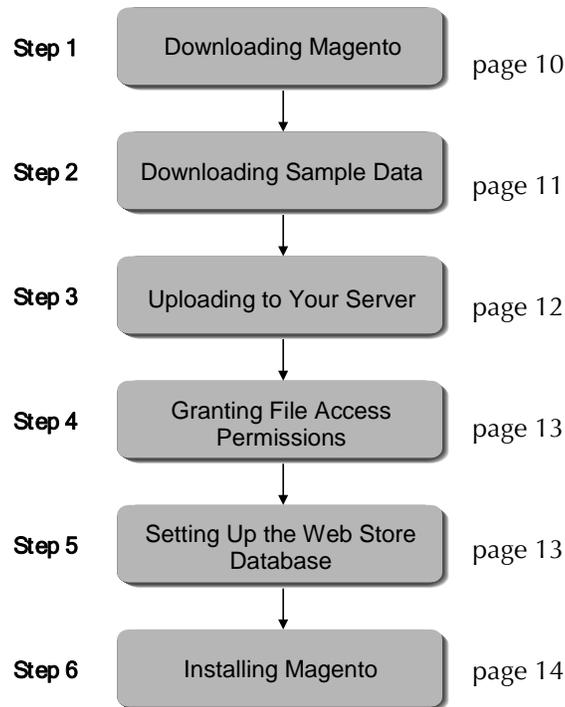
- ❖ **Supported Operating Systems:** Linux server x86, x86-64
- ❖ **Supported Web Servers:** Apache 1.3.x, Apache 2.x, Apache 2.2.x
- ❖ **PHP Compatibility:** 5.2.13 with Safe mode off and memory limit no less than 256 MB (preferably 512 MB)
- ❖ **MySQL:** 4.1.20 and InnoDB storage engine

If you are unsure whether your hosting company supports these specifications, please check with them or your company's system administrator. Alternatively, to download a script that verifies whether your server is compatible or not, refer to the following web page: <http://www.magentocommerce.com/knowledge-base/entry/how-do-i-know-if-my-server-is-compatible-with-magento>.

## 2.2 Installing Magento CE

After you have verified that your hosting environment meets Magento's system requirements, as specified above, you can download and then install Magento to your server.

The following is the workflow for downloading and installing Magento:



### Step 1: Downloading Magento CE

Magento CE can be downloaded free of charge from the Magento community site.

**Tip:** You can download Magento whether you have registered on the community site or not. We recommend registering so that you can later access the various valuable resources that the community has to offer, such as forums, a wiki, groups, and screencasts.

To download Magento Community Edition:

1. Use your web browser to navigate to <http://www.magentocommerce.com/download> and log in, or go to <http://www.magentocommerce.com> and select **Downloads > Download Magento** to display Download page as shown in Figure 3.

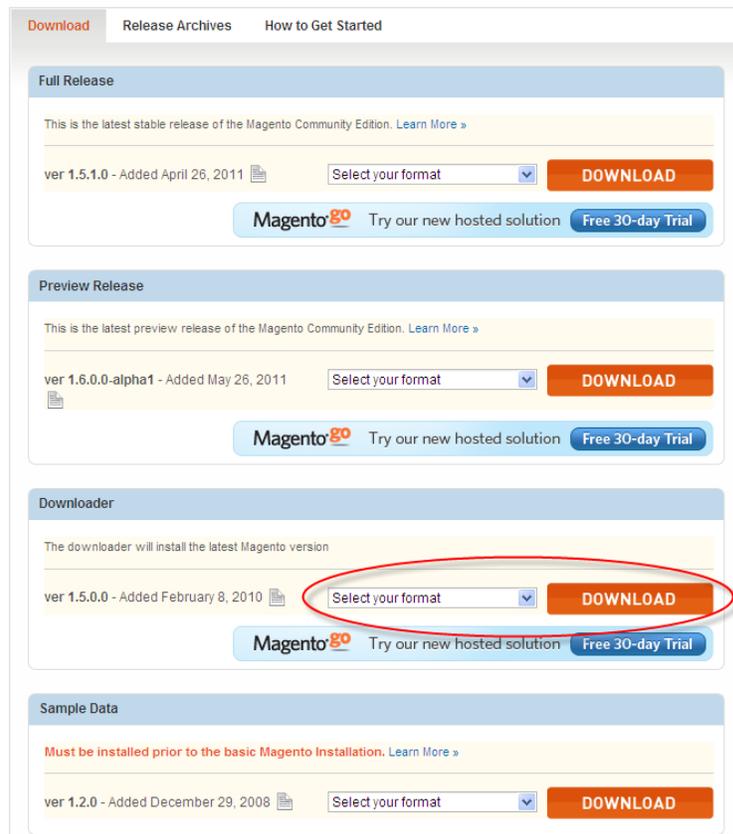


Figure 3. Magento Download Page (Magento Downloader)

**Note:** This page will appear slightly differently on the web after a newer version is released.

2. We recommend that you select the **Downloader** option, as shown above. The instructions in this chapter are written for the downloader.

Multiple compressed formats are provided. If you are unsure which version to download, use the **.zip** format.

3. Click the **Download** button and save the file to the location of your choice.

## Step 2: Downloading Sample Data

Magento enables you to load a few basic products and information into your web store to populate your web store frontend and backend with some initial sample data. Even though you will later delete these products, it may help orient you while getting started. This step is recommended, but not mandatory.

To download Sample Data for your Magento web store:

1. Navigate to <http://www.magentoocommerce.com/download> and log in or go to <http://www.magentoocommerce.com> and select **Downloads > Download Magento** from the menu to open the Download page as shown in Figure 4.

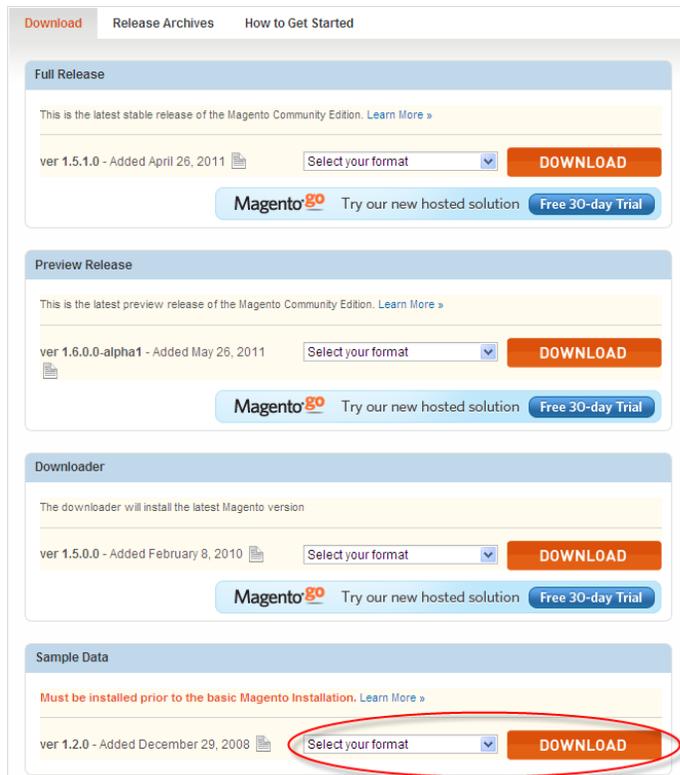


Figure 4. Magento Download Page (Magento Sample Data)

**Note:** This page will appear slightly differently on the web after a newer version is released.

2. Select a format for downloading **Sample Data**. Multiple compressed formats are provided. If you are unsure of which version to download, then use the **.zip** format.
3. Click the **Download** button and save the file to the location of your choice.

### Step 3: Uploading to Your Server

After you have downloaded the Magento downloader and Magento Sample Data, you must upload these packages to your server.

#### To upload to your server:

1. The file names are: **magento-downloader-x.x.x.zip** (or **.tar.gz** or **.tar.bz2**, depending on the format that you downloaded) for the Magento downloader and **magento-sample-data-x.x.x.zip** for the Magento Sample Data. Extract (unzip) the files to a directory of your choice.
2. Use your favorite FTP/SFTP program to copy the contents of the **magento** folder from the Magento downloader package to the server's root WWW directory (which is usually named **public\_html**) or any other subdirectory of your choice, such as **/store**.

## Step 4: Granting File Access Permissions

The top-level Magento directory on the server (the directory to which you uploaded the decompressed files) and all Magento directories under it must have the correct permissions in order for the Magento Installer to operate properly.

### To grant file access permissions:

1. Navigate to your Magento directory on the server using your FTP/SFTP client.
2. Use the **Change Permissions** or the **Change Mode** function of your FTP/SFTP client to grant permission to the web server to write to these files and folders. There are two typical ways of representing file permissions in Linux:
  - ❖ As a number (for example, 755)
  - ❖ As a series of permissions categorized into user, group or other

If your FTP client uses the first representation (as a number), set the permissions on the directory to **777** or **0777**. If your FTP client uses the second representation, set the permissions as shown in Figure 5.

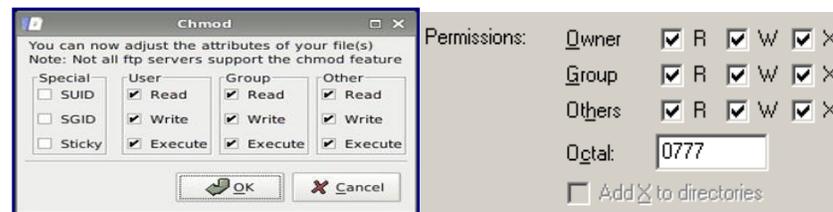


Figure 5. Directory Permission Settings

Ensure that you select the **Recursive** option in order to set the proper permissions on all subdirectories.

**Note:** Some servers have the correct permissions already set and, therefore, no changes need to be made in this case.

## Step 5: Setting Up the Web Store Database

### To create and set up the database to be used by your web store:

1. Using a database management application such as **phpMyAdmin**, or a tool provided by your hosting provider, create a new, empty database and assign users and permissions to it.
2. If you want to use the sample data, do the following:
  - a. Using an FTP or SFTP tool, transfer the extracted sample data file to a directory on the server. The file name will be similar to **magento\_sample\_data\_for\_x.x.x.sql**.
  - b. Use the database management tool to import the file **magento\_sample\_data\_for\_x.x.x.sql** into this new database.

- c. To add sample images to the sample products in your store, copy the contents of the **Media** folder from the **Sample Data** package onto the new **Media** folder on your server

*You are now ready to install Magento!*

## Step 6: Installing Magento CE

In this step you install Magento CE using the Downloader tool.

To install Magento:

1. Use a standard web browser to navigate to the location on your server where you uploaded the Magento downloader. If everything has been set up correctly as described up until now, the Magento Installation Wizard Welcome page is displayed, as shown in Figure 6.

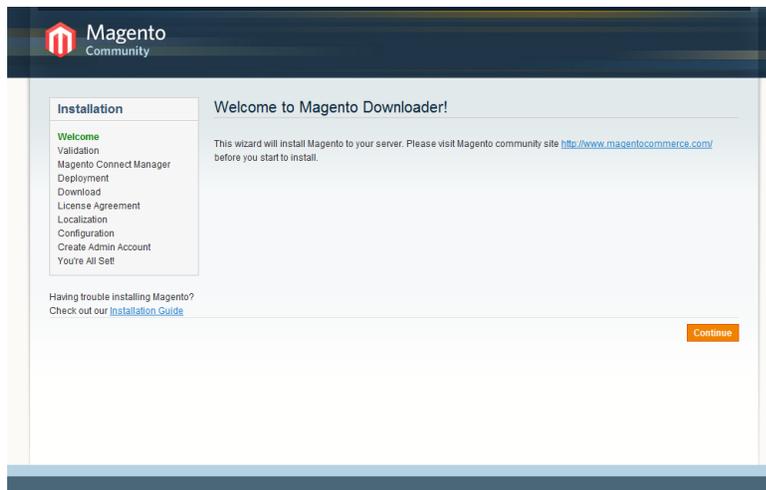


Figure 6. Magento Downloader Welcome Page

2. Click **Continue** to proceed to the Validation page, as shown in Figure 7.

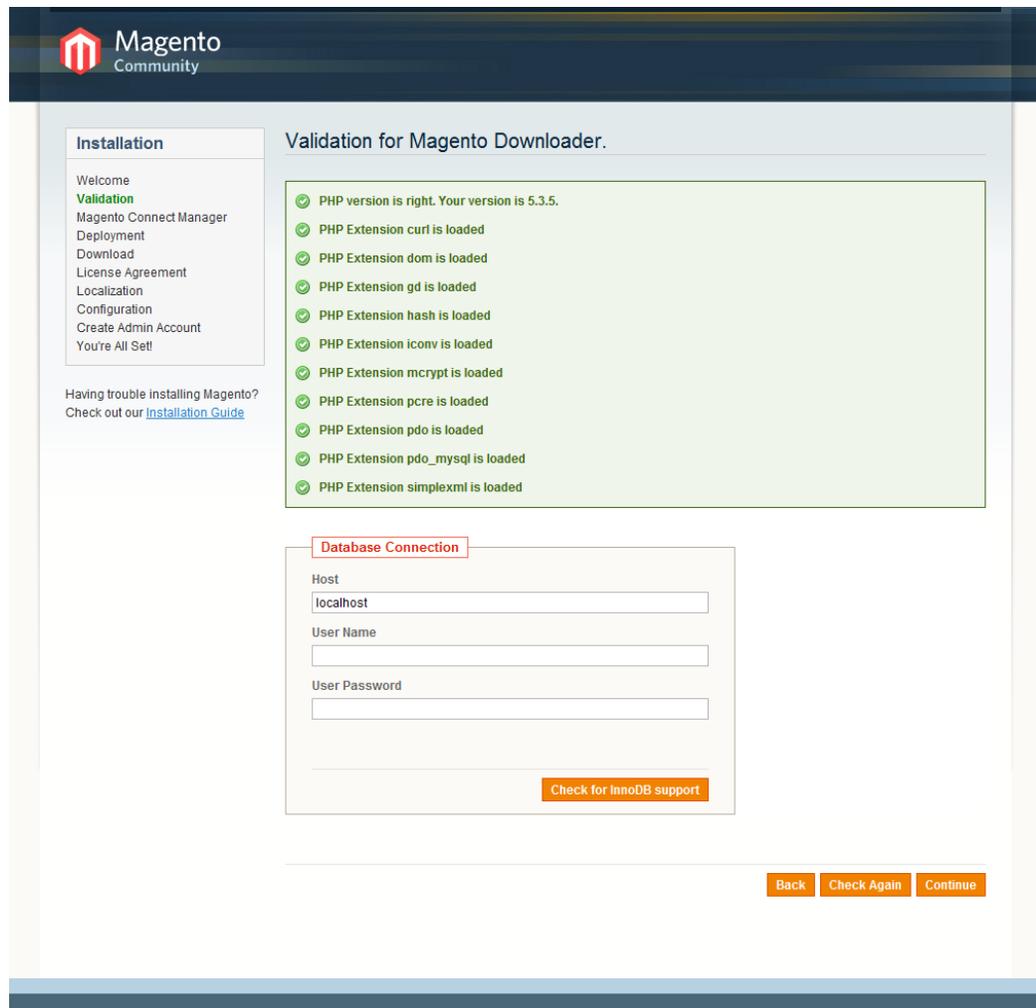


Figure 7. **Magento Downloader Validation Page**

This page tests your environment to determine if it will support Magento. If error warnings are displayed, correct the errors and click **Check Again**.

3. When there are no more errors, specify the host, user name, and user password for the database server in the Database Connection box. To check the authorization data for connecting to the database server and to the data storage, click the **Check InnoDB support** button. The installation will not proceed if the information entered in any of these fields is invalid.
4. Click **Continue** to proceed to the Magento Connect Manager Deployment page.

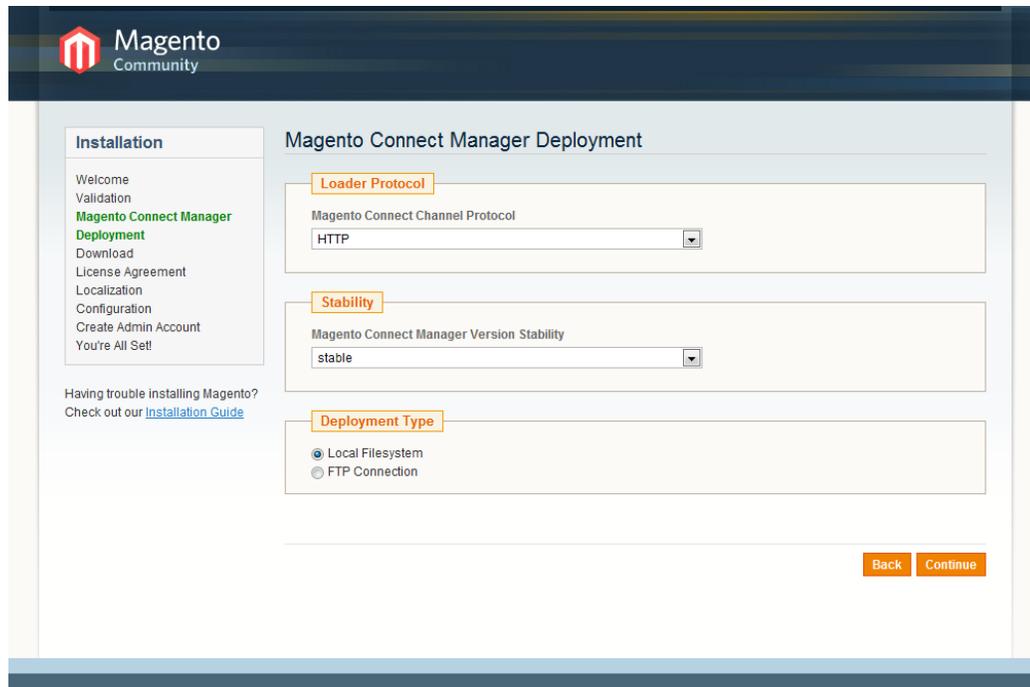


Figure 8. **Magento Downloader Connect Manager Deployment Page**

5. Choose whether Magento Connect Manager will be downloaded via the **HTTP** or the **FTP** protocol. We recommend that you choose **HTTP** because it takes less time than using the FTP protocol. If outgoing HTTP connections are not allowed in your hosting environment, then choose **FTP**.
6. In the **Magento Connect Manager Version Stability** drop-down list, select the **Stable** option. The available options are **stable**, **beta**, or **alpha**.
7. For **Deployment Type**, select either **Local Filesystem** or **FTP Connection** to indicate whether Magento Connect Manager will be deployed on your file system or via an FTP connection. We recommend that you deploy using **FTP**. Deploying Magento Connect Manager through the FTP connection resembles the process of a customer personally uploading files on the server and it does not require changing permissions for reading, writing, and executing files. With file system deployment, because of the permissions that the Apache account provides when deploying this way, deployed files are more vulnerable to permissions problems. In this case, you should contact the server administrator in order to change the file permissions after the installation is completed.

**Note:** The **Local Filesystem** option will be unavailable if the system account of the web server does not have permission to write to the directory when Magento CE is installed.

If you select the **FTP Connection** option as a deployment type, a number of other options become available, including the host name of the FTP server and the credentials for connecting to the FTP server. For these fields, use the values that were provided by the FTP server administrator. In the **Installation Path** field, specify the path to where Magento CE will be installed. (This should be the same directory into which you uploaded the `downloader.php` file.)

To check the connection to the FTP server, click **Check FTP**. If any of the FTP parameters under Deployment Type is invalid, Magento Connect Manager will not be deployed via FTP.

8. Click **Continue** to install the Magento Connect Manager.
9. When you see the message “Magento has been downloaded successfully,” click **Continue** to proceed to the Installer wizard.

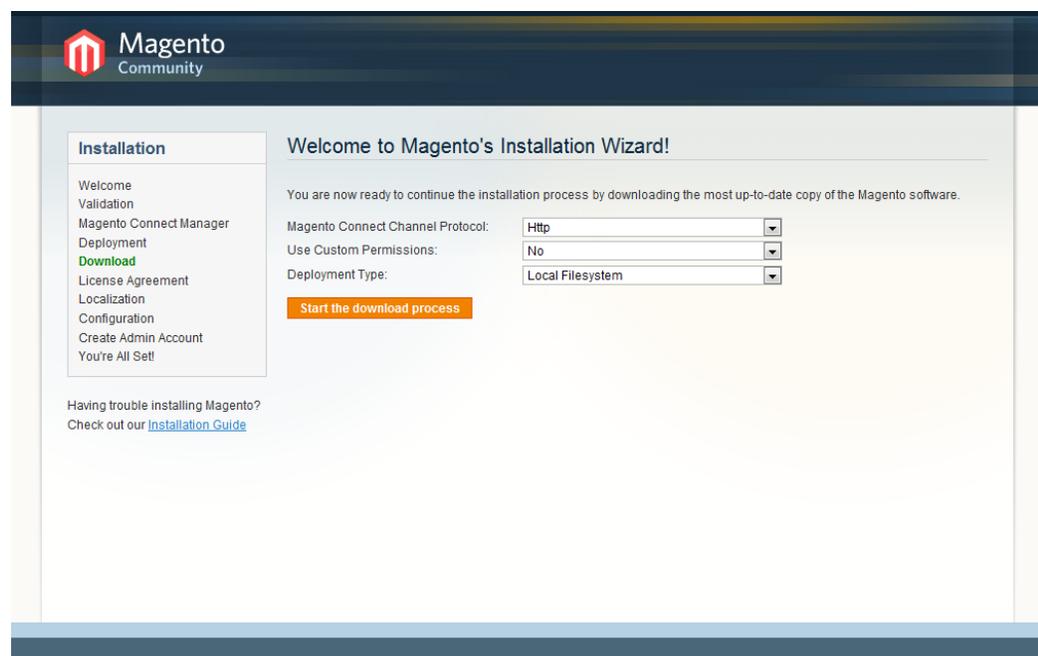


Figure 9. Magento Installation Wizard Welcome Page

10. In the **Magento Connect Channel Protocol** drop-down list, select the same protocol that you selected in step 5.
11. In the Custom Permissions field choose how the execute, read, and write permissions will be applied to the Magento downloaded folders and files on the server.
  - ❖ **Yes** – The Magento CE administrator will be able to execute, write, and read files in the downloaded folders. In the **Folders** and **Files** fields that appear, specify values in the octal number system which will denote the permissions that the Magento administrator will have for folders and files, respectively, on the server.
  - ❖ **No** – custom permissions are not specified for downloaded folders and files. In this case the system default values are used:

- For folders – 0777 (permissions for read, write, and execute)
  - For files – 0666 (permissions for read and write)
12. Select the **Deployment type** that you selected in step 7. The types must match or an error will occur during installation.
  13. Click **Start the download process**. A series of messages is displayed to indicate the progress of the download process, as shown in Figure 10.

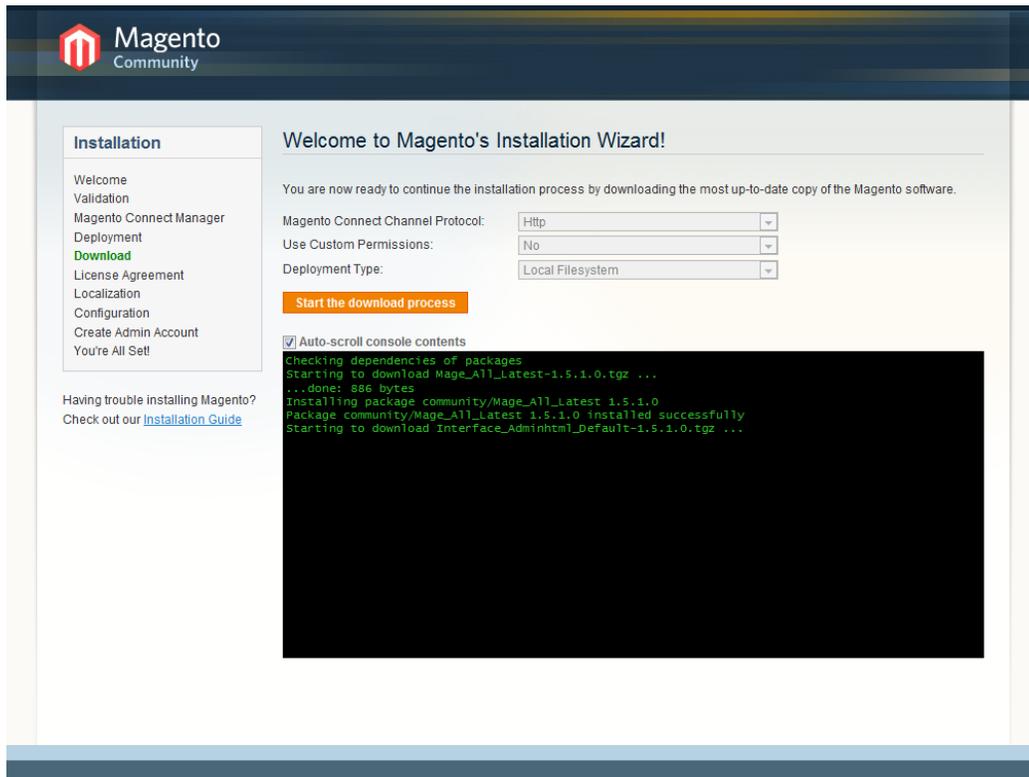


Figure 10. Installation Progress

After this is completed, the following message is displayed at the bottom of the page:

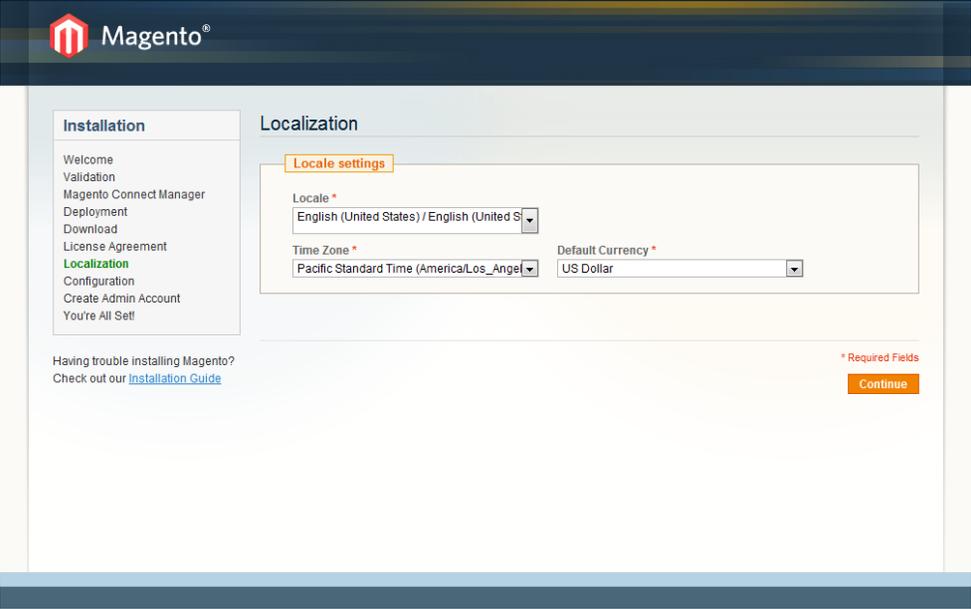
 **Download completed. You can proceed with installation**

**Continue Magento installation**

**Note:** If you were unable to complete the download process through this interface due to a connection error, try to upload the Full Magento Package from the Community download page.

14. Click **Continue Magento installation** to proceed.
15. Read and agree to the terms of Magento's license. More information is provided about this subject in the *Magento License* section on page 3. Click **Continue**.

16. On the Localization page (Figure 11), select your locale, time zone, and default currency. These are default values for any web stores and web store views you create; when you set these up, you can select localization preferences for each one.



The screenshot shows the Magento Installation Wizard's Localization page. At the top left is the Magento logo. Below it is a sidebar menu with the following items: Welcome, Validation, Magento Connect Manager, Deployment, Download, License Agreement, Localization (highlighted in green), Configuration, Create Admin Account, and You're All Set! The main content area is titled "Localization" and contains a section for "Locale settings". This section has three dropdown menus: "Locale \*" set to "English (United States) / English (United S)", "Time Zone \*" set to "Pacific Standard Time (America/Los\_Angel)", and "Default Currency \*" set to "US Dollar". At the bottom left of the main content area, there is a link: "Having trouble installing Magento? Check out our [Installation Guide](#)". At the bottom right, there is a red asterisk icon with the text "\* Required Fields" and an orange "Continue" button.

Figure 11. **Magento Installation Wizard Localization Page**

**Note:** Localization settings can be changed later if needed.

Click **Continue** to proceed to the next page.

17. On the Configuration page (Figure 12), change the default values as needed according to your requirements and database information.

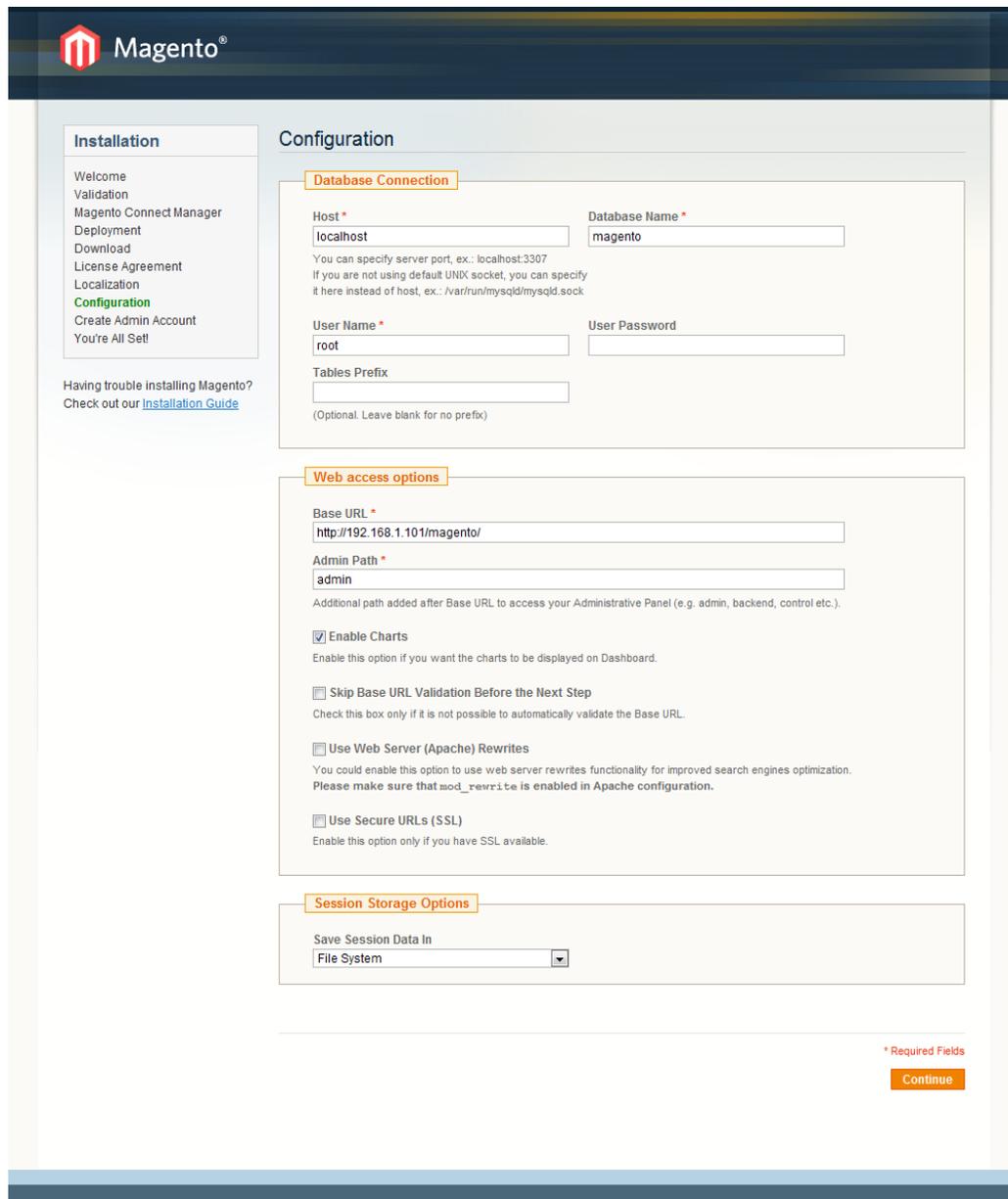


Figure 12. Magento Installation Wizard Configuration Page

The first two options make purchasing and administration more secure. Usually, you can leave the other options as they are.

We strongly recommend setting the following options if your server has an SSL certificate installed:

- ❖ Select the **Use secure URLs (SSL)** check box; additional settings become available to configure this option.
- ❖ Specify the complete base URL for the SSL connection in the **Secure Base URL** field and select the **Run the admin interface with SSL** check box.

We also recommend selecting the **Use Web Server (Apache) Rewriters** option.

**Note:** SSL settings can be changed later if needed.

When you are finished, click **Continue**.

18. The Create Admin Account page enables you to specify access information, as follows:

- ❖ Specify the administrator's name and email.
- ❖ Create a user name and password.
- ❖ Specify the encryption key, or Leave the **Encryption Key** field empty to display the key on the next page.

**Installation**

- Download
- License Agreement
- Localization
- Configuration
- Create Admin Account**
- You're All Set!

Having trouble installing Magento?  
Check out our [Installation Guide](#)

### Create Admin Account

**Personal Information**

First Name \*  Last Name \*

Email \*

**Login Information**

Username \*

Password \*  Confirm Password \*

**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 display it on the next page.

\* Required Fields

**Continue**

Click **Continue** to proceed to the next page.

19. The You're All Set page shows your encryption key.

**Installation**

- Download
- License Agreement
- Localization
- Configuration
- Create Admin Account
- You're All Set!**

Having trouble installing Magento?  
Check out our [Installation Guide](#)

### You're All Set!

Get ready to experience Open-Source eCommerce Evolved.

Before you continue to your store, please make a note of your encryption key (Magento uses it to encrypt passwords, credit cards and more).

**6b42482320eb71e45724ff34e62c174d**

(Make sure you keep it in a safe place.)

**Go to Frontend** **Go to Backend**

**Tip:** Write down the encryption key and keep it in a safe place. If you need or want to move your store data to a new Magento CE site, you will need this encryption key to recover the encrypted data.

***Congratulations! You have now completed the installation of Magento CE!***

**Note:** If you want to run through the Setup Wizard again, you do not have to download all the Magento CE files again. Simply delete the `app/etc/Local.xml` file and any files and directories in the `var/` directory. Go back to <http://www.yourDomain.com/magento-directory> with your browser. The Setup Wizard will run automatically again.

You can visit your new Magento storefront by selecting the **Go to Frontend** button or by specifying the URL of your store in your browser.

You can also access the administration backend and begin configuring your new web store, as described in the *Accessing the Backend* section on page 23.

**Tip:** You can easily open the backend by clicking the **Go to Backend** button on the last page of the Magento Installation Wizard, shown above. We recommend that you bookmark this page for easy access.

**Tip:** The process described above sets you up with a single website, single store and three store views for different languages. This is most probably all you need. However, if you would like to create a more sophisticated web store with multiple options, then see “Setting Up Your Store Hierarchy,” page 129.

## 3 Basic Configuration

This chapter describes how to configure the basic information for your web store. The other aspects of your web store to be configured are described in the subsequent chapters of this guide.

### 3.1 Accessing the Backend

All of the basic configuration tasks are performed in the Magento CE backend. The following describes how to access and log in to the Magento CE backend.

**Tip:** Immediately after you install Magento CE, you can easily open the backend by clicking the **Go to Backend** button on the last page of the Magento Installation Wizard. We recommend that you bookmark the backend page for easy access.

To access the Magento backend administration environment:

1. Use a standard web browser to navigate to the backend by entering the URL that you specified in the Magento Installation Wizard with the addition of the suffix **/admin** (or the one that you specified during installation). For example, if you specified **mywebstore.com** as the base URL, then use <http://www.mywebstore.com/admin> to access your backend.

**Note:** The Magento CE Demo Store backend can be accessed at: <http://demo-admin.magentoocommerce.com/admin>

The Log in to Admin Panel page is displayed, as shown in Figure 13.



Figure 13. Backend Login Page

2. Log in using the user name and password that you created during the installation process.

**Note:** The backend of the Magento Demo Store can be accessed using the **User Name: admin** and **Password: 123123**

3. Click the **Login** button to display the administration panel, as shown in. Figure 14.

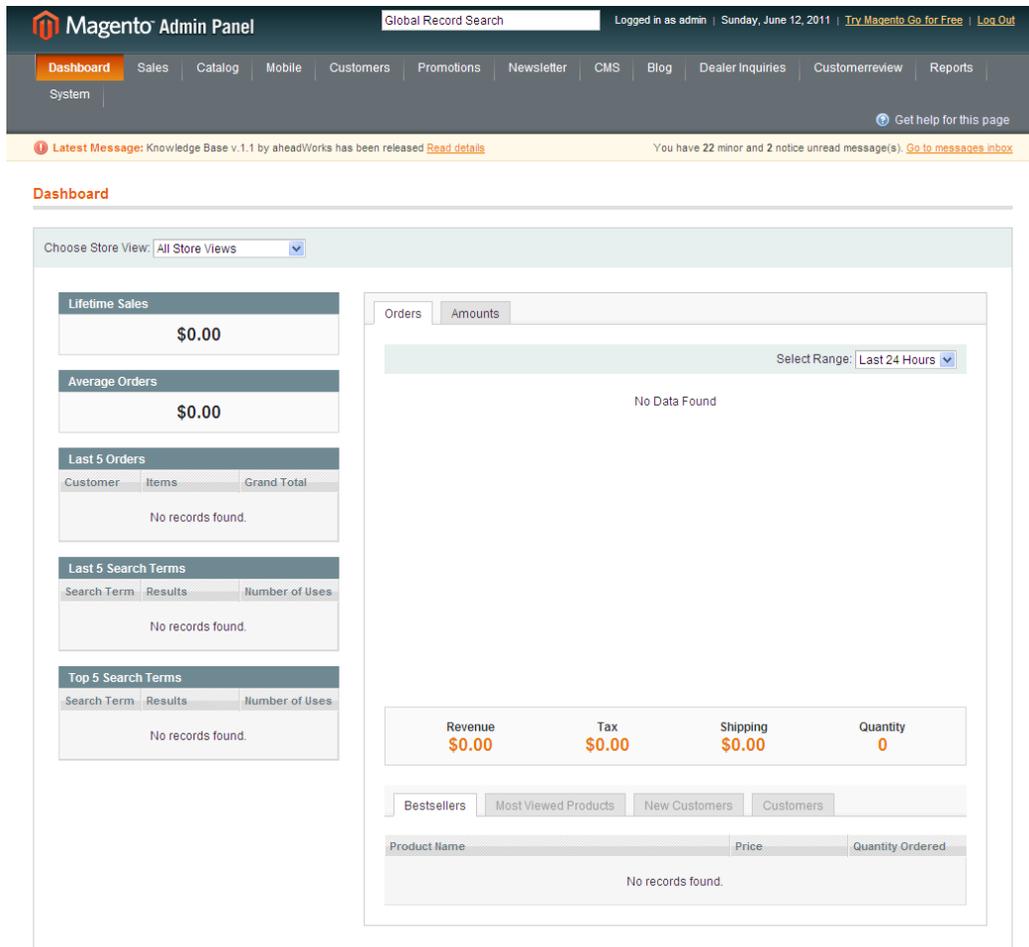


Figure 14. Magento CE Backend

4. After you log in, the Magento messages that you have not yet read are displayed, such as the one shown in Figure 15.

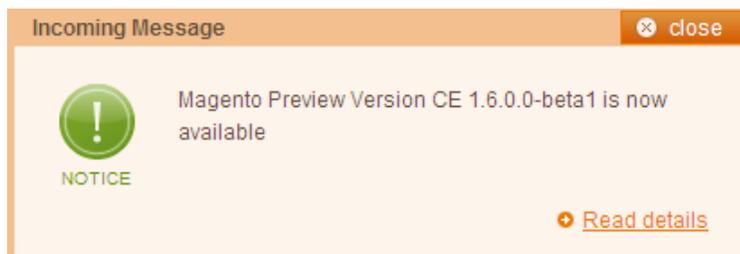


Figure 15. Incoming Message Notice

Additionally, information about other messages is shown in a bar just under the menu (see Figure 16). See “Managing Administrator Messages,” page 62, for more information about managing these messages.

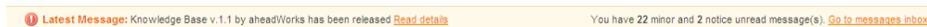


Figure 16. Message Bar

## 3.2 Store Hierarchy

Among the first things you will want to do is plan your store hierarchy, that is, the arrangement of websites, stores, and store views. When Magento CE is installed, a “Main Website,” a default store, and a default store view are created. You will want to create additional websites, stores, and store views, depending on the breadth of the items you are selling and the composition of your target markets.

To be able to create these entities, you need to create at least one root category first. See “Managing Categories,” page 79, for more information about creating root categories. For now, determine how you want your store hierarchy set up.

### 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, but in a single Magento CE 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 not to share any 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. (See “Managing Categories,” page 79, for more information about setting up root categories). 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 separate store views, one for English and one for Spanish. The store views share the same catalog, but each is presented in its respective language. Customers use a drop-down list on the frontend to switch from one store view to another.

## 3.3 Store Pages General Configuration

This section describes how to configure general aspects of your frontend pages. These configurations are performed in the Configuration area of the Admin Panel.

To access the Configuration section, select **System > Configuration**. The tabs in the left column provide access to configuration options for different aspects of your Magento CE instance. The Current Configuration Scope drop-down list in the upper left corner of the page enables you to select the hierarch level (website, store, store view) to which the configuration will be applied. To apply configuration settings at the global level (that is, for all your websites, stores, and store views), leave **Default Config** selected.

To open the options for configuring your store pages design click the **Design** tab in the left column. The Design page opens with a number of field sets.

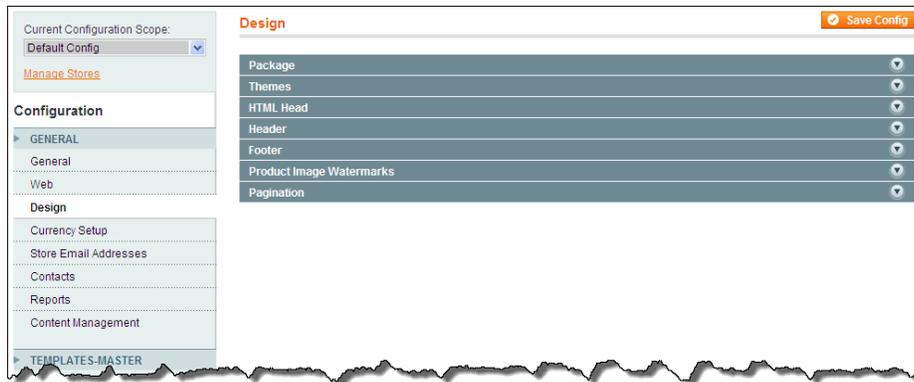


Figure 17. Design Configuration Page

## HTML Head Field Set

The settings in the **HTML Head** field set on the Design tab are used to define general information about your store's pages. These settings may not be visible to your customers, but they are important for things such as traffic analytics and search engine optimization.

To define general page features:

1. Click the **HTML Head** heading to expand the field set as shown in Figure 18.

**Design** Save Config

Package ▼

Themes ▼

HTML Head ▲

Favicon Icon	<input type="text"/> <input type="button" value="Browse..."/>	[STORE VIEW]
	<small>▲ Allowed file types: ICO, PNG, GIF, JPEG, APNG, SVG. Not all browsers support all these formats!</small>	
Default Title	<input type="text" value="Magento Commerce"/>	[STORE VIEW]
Title Prefix	<input type="text"/>	[STORE VIEW]
Title Suffix	<input type="text"/>	[STORE VIEW]
Default Description	<input type="text" value="Default Description"/>	[STORE VIEW]
Default Keywords	<input type="text" value="Magento, Varien, E-commerce"/>	[STORE VIEW]
Default Robots	<input type="text" value="INDEX, FOLLOW"/> ▼	[STORE VIEW]
Miscellaneous Scripts	<input type="text"/>	[STORE VIEW]
	<small>▲ This will be included before head closing tag in page HTML.</small>	
Display Demo Store Notice	<input type="text" value="Yes"/> ▼	[STORE VIEW]

Header ▼

Footer ▼

Product Image Watermarks ▼

Pagination ▼

Figure 18. HTML Head Field Set

**Note:** The words in square brackets (for example, *[STORE VIEW]*) indicate the scope of the associated option.

- Click the **Browse** button and select an icon file (on your local computer) to use as a “favicon.” This small icon appears in the address bar of your customers’ browsers.
- In the **Default Title** field, specify the page title to be displayed in browsers for those pages that do not have their own title. This information is also used to improve search engine visibility and performance.

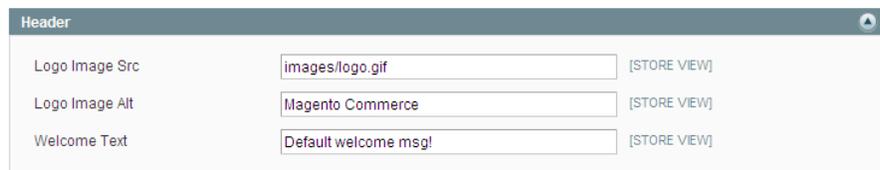
4. In the **Title Prefix** and **Title Suffix** fields, specify a prefix and a suffix to be appended to the pages of your web store that have their own title, such as a prefix of **My Web Store**.
5. In the **Default Description** and **Default Keywords** fields specify words that describe your web store to be used by search engines when page-specific information is not provided. Keywords must be separated by commas.
6. Optional. Select **Display Demo Store Notice** to display a notice at the top of every page that indicates that this is a demo store and that no transactions will be processed. This option is useful while you are setting up your store prior to opening for business.
7. Click the **Save Config** button on the top right of the page.

## Header Field Set

The options on the **Header** field set define the look of the top of each page in your store.

To define the header of each web store page:

1. Click the **Header** tab to expand the section as shown in Figure 19.



The screenshot shows a configuration window titled "Header" with three input fields. The first field is "Logo Image Src" with the value "images/logo.gif" and a "[STORE VIEW]" button. The second field is "Logo Image Alt" with the value "Magento Commerce" and a "[STORE VIEW]" button. The third field is "Welcome Text" with the value "Default welcome msg!" and a "[STORE VIEW]" button.

Figure 19. Header Field Set

2. In the **Logo Image Src** field, specify the logo graphic file to appear on the top left of each page of your web store, as shown in Figure 20 for the Magento Demo Store. Make sure that you name your logo something other than **logo.gif**, so it does not get overwritten in future upgrades.

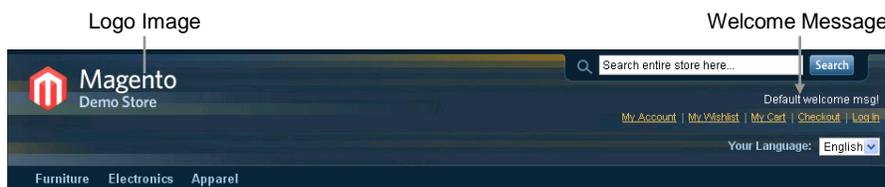


Figure 20. Page Header Section

**Note:** You will need to upload the image file using an FTP client to the `skin/frontend/default/default/images/` directory or to your own skin folder in your Magento CE installation.

3. In the **Logo Image Alt** field, specify the alternative text to be displayed when your customers hover their mouse cursors over the logo image in your web store.
4. In the **Welcome Text** field, specify the welcome message to be displayed on the top right of your web store for customers that are not logged in, as shown in Figure 20.
5. Click **Save Config** to save your changes.

## Footer Field Set

The options in the **Footer** field set define what is displayed at the bottom of each web page in your store.

To define the footer of your web store pages:

1. Select the **Footer** option to expand the page to display the footer options, as shown in Figure 21.

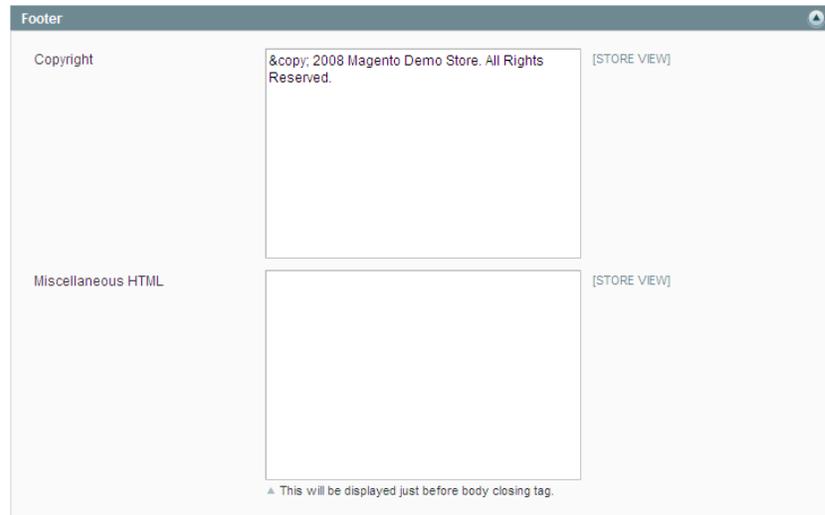


Figure 21. **Footer Field Set**

2. In the **Copyright** field, specify your web store's copyright information.
3. In the **Miscellaneous HTML** field, specify the custom HTML code to be added to the end of the page code that is generated by Magento CE. This area is usually used for adding tracking scripts that track your customers' activity on the site.
4. Click **Save Config** to save your changes.

## 3.4 Store Contacts Configuration

This section describes how to configure store email addresses that are used for internal and external email communications and the Contact Us feature.

### Web Store Emails

The Store Email Address page of the system configuration enables you to specify email addresses and contact names to be used when sending email to customers upon registration and at all steps of the order lifecycle. These email address are also used for sending error reports to the store administrator.

## To define web store email addresses:

1. In the Admin panel, select **System > Configuration > GENERAL > Store Email Address**. Here you can configure the various email addresses used for sending emails from your web store to your customers.

The screenshot shows the 'Store Email Addresses' configuration page. At the top right is a 'Save Config' button. Below the title are four sections, each with a 'Sender Name' and 'Sender Email' field and a '[STORE VIEW]' link:

- General Contact:** Sender Name: Owner; Sender Email: owner@example.com
- Sales Representative:** Sender Name: Sales; Sender Email: sales@example.com
- Customer Support:** Sender Name: CustomerSupport; Sender Email: support@example.com
- Custom Email 1:** (empty fields)
- Custom Email 2:** (empty fields)

Figure 22. Store Email Addresses Page

2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply. All fields on this page can have different values for each store view.
3. In each **Sender Name** field, specify the name of the sender or department from which the emails are sent.
4. In the **Sender Email** field specify the email address used for sending the emails.
5. Click **Save Config** to save your changes.

**Note:** See “Customizing Transactional Emails,” page 169, for more information about emails.

## Contacts

These options define the email to which customers send requests when using the **Contact Us** option at the bottom of the pages of your web store.

## To define your web store contact information:

1. In the Admin Panel, select **System > Configuration > GENERAL > Contacts** to display the Contacts page, as shown in Figure 23.

**Contacts** Save Config

**Contact Us**

Enable Contact Us  [STORE VIEW]

**Email Options**

Send Emails To  [STORE VIEW]

Email Sender  [STORE VIEW]

Email Template  [STORE VIEW]

Figure 23. **Contacts Page**

2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. In the **Enable Contact Us** drop-down list, select **Yes** to enable customers to contact you by email with the **Contact Us** link, or select **No** to disable this communication method.
4. In the **Send Emails To** field, specify the email that is used for receiving feedback when a customer uses the **Contact Us** option in the store.
5. In the **Email Sender** drop-down list, select the email address from which feedback messages are sent.
6. In the **Email Template** drop-down list, select the template to be used for the Contact Us form displayed on the frontend. You can create custom email templates. For more information, see “Customizing Transactional Emails,” page 169.
7. Click **Save Config** to save your changes.

## Sales Emails

You can configure Magento CE to send emails that confirm an order, invoice, shipment, or credit memo to both registered customers and store guests.

### To configure sales emails sent to customers:

1. In the Admin Panel, select **System > Configuration > SALES > Sales Emails**.
2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. Click the **Order** heading to expand the Order field set, as shown in Figure 24.

**Sales Emails** Save Config

**Order**

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 Lo [STORE VIEW]

Send Order Email Copy To: [STORE VIEW] *Comma-separated.*

Send Order Email Copy Method: Bcc [STORE VIEW]

Order Comments [v]

Invoice [v]

Invoice Comments [v]

Shipment [v]

Shipment Comments [v]

Credit Memo [v]

Credit Memo Comments [v]

Figure 24. Sales Emails Page

4. In the Order field set, configure the following options:
  - ❖ In the **Enabled** drop-down list, select **Yes** to enable new order confirmation emails to be sent.
  - ❖ In the **New Order Confirmation Email Sender** drop-down list, select the email address to be used for sending the new order confirmation.
  - ❖ In the **New Order Confirmation Template** drop-down list, select the template to be used for the for the order confirmation emails sent to registered customers.
  - ❖ In the **New Order Confirmation Template for Guest** drop down- list, select the template to be used for the for the order confirmation emails sent to guest customers.
  - ❖ In the **Send Order Email Copy To** field, specify the email address to which a copy of the new order confirmation email is sent. This feature helps you to keep track of the new orders that come in.
5. Configure the options on the other field sets on this page.
6. Click **Save Config** to save your changes.

## 3.5 Shipping Settings

This section describes how to specify shipping options, such as the origin used for shipping rate calculations and whether to enable the multiple shipping destinations feature.

Configuring shipping settings and shipping methods enables you to provide customers a selection of shipping methods with shipping rates during checkout. Magento CE includes extensive integration with major shipping carriers; for USPS, DHL, FedEx, and UPS you can create shipment orders and print shipping labels right from the Magento CE Admin Panel. See “



Shipping,” page 139, for details about shipping system integration.

To define general shipping options:

1. In the Admin Panel, select **System > Configuration > SALES > Shipping Settings**.
2. In the **Current Configuration Scope** drop-down list in the left upper left corner, select the scope for which you want these configurations to apply.
3. Click the **Origin** and **Options** tabs to expand the page to display the shipping options, as shown in Figure 25.

**Shipping Settings** Save Config

**Origin**

Country	United States	[WEBSITE]
Region/State	California	[WEBSITE]
ZIP/Postal Code	90034	[WEBSITE]
City		[WEBSITE]
Street Address		[WEBSITE]
Street Address Line 2		[WEBSITE]

**Options**

Allow Shipping to Multiple Addresses	Yes	[WEBSITE]
Maximum Qty Allowed for Shipping to Multiple Addresses	100	[WEBSITE]

Figure 25. Shipping Settings Page

4. Configure the options to match your store.
5. Click **Save Config** to save your changes.

See “General Shipping Settings,” page 139, for details about configuring shipping methods.

## 3.6 Cookie Restriction Mode

Magento can notify store customers about cookies that are being used by a. The feature is called Cookie Restriction Mode. It is aimed at helping store owners to comply with the European Union Privacy and Electronic Communications Directive and its amendment. According to these documents, websites cannot use cookies until a user consents.

## Enabling and Configuring Cookie Restriction Mode

To enable the cookie restriction mode:

1. Log in to the Magento Admin Panel.
2. Navigate to **System** > **Configuration** > GENERAL > **Web**.
3. In the **Current Configuration Scope** in the upper-left corner of the page select the desired website.
4. Expand the **Session Cookie Management** filed set.
5. In the **Cookie Restriction Mode** field select **Yes**.
6. To save the changes click the **Save Config** button.

## Cookie Restriction Mode: Implementation Details

After the cookie restriction mode is enabled, a message is displayed on the top of each page in the store front. The message informs customers that the website requires cookies to provide all of its features and requests users to confirm that they are informed and consent. See Figure 26.

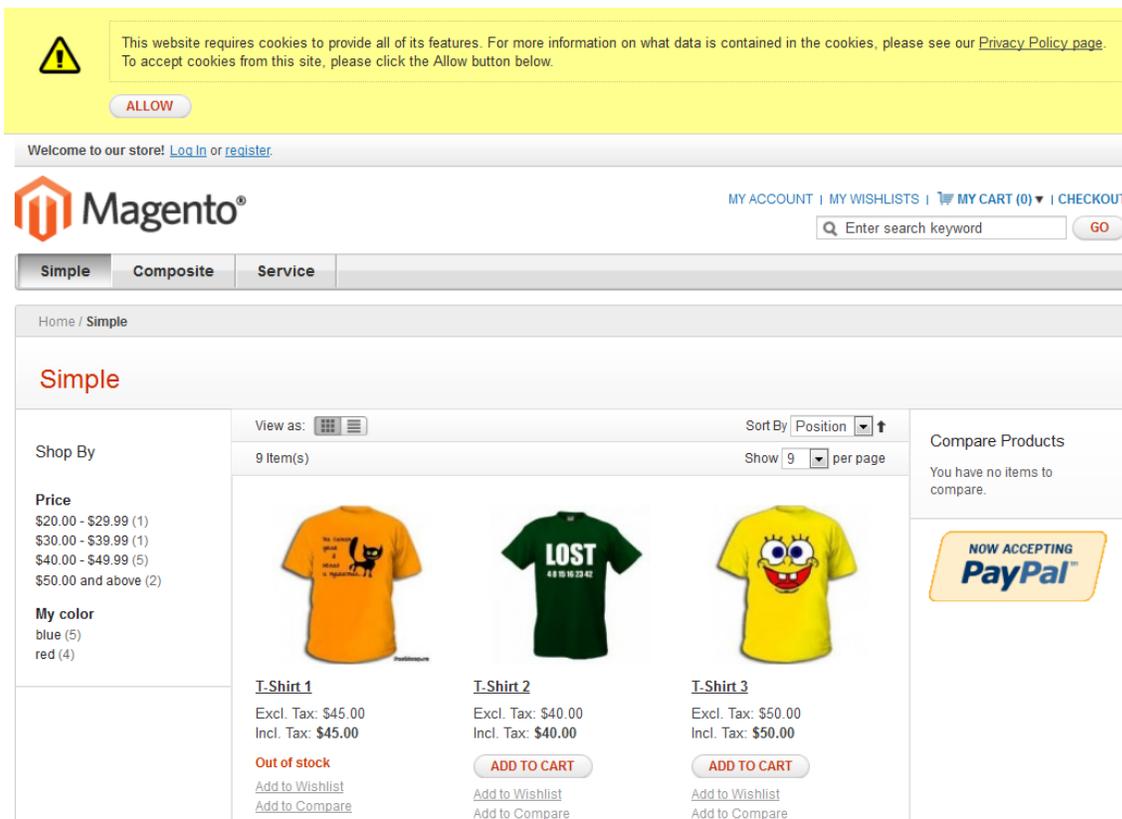


Figure 26. A warning message is displayed in the frontend when the cookie restriction mode is enabled

The message contains a link to the Privacy Policy page, which provides a list of cookies being collected and explains on how they are used. The default content of this page can be changed under **CMS > Pages > Manage Content > Privacy Policy**.

After a customer clicks **Allow**, the message disappears.

If a customer does not click **Allow**, the message persists, but the store functionality is available as usual. However, Google Analytics cookies are not stored in this case, even if the Google Analytics functionality is enabled.

## Cookies Used in Magento

The following table lists cookies, which are always stored by Magento on the customer's side.

Cookie Name	Cookie Description
USER_ALLOWED_SAVE_COOKIE	Indicates whether a customer is allowed to use cookies
external_no_cache	A flag which indicates whether caching is disabled
persistent_shopping_cart	Session key
Stf	If links to a product were sent to friends, this cookie stores the timestamps in the '\$timeStamp1, \$timestamp2, ..., \$timestampN' format.
pollN	A poll ID to indicate that the poll has been already voted.
frontend	Session ID
guest-view	Allows guests to edit their orders.

The following table contains a list of cookies, which Magento additionally stores on customers side if the Full Page Cache functionality is enabled.

Cookie Name	Cookie Description
CUSTOMER	Hashed value of a customer ID in the 'customer_\$customerId' format
CUSTOMER_INFO	Hashed value of a customer group ID in the 'customer_group_\$customerGroupId' format
NEWMESSAGE	Indicates whether a new message has been received
CART	Hashed value of a quote ID in the '\$quoteId' format
COMPARE	List of product IDs added by customer to compare list in the '\$productId 1, \$productId 2, ..., productId N' format
POLL	ID of a recently voted poll
RECENTLYCOMPARED	A customer's list of recently compared product IDs in the '\$productId 1, \$productId 2, ..., productId N' format

WISHLIST	Hashed list of products added to wishlist in the '\$productId 1_\$productId 2_..._productId N' format
WISHLIST_CNT	Hashed number of items in the customer's wishlist in the 'wishlist_item_count_\$productCount' format
CUSTOMER_AUTH	Indicates whether a customer is logged in. A hashed value of 'customer_logged_in_0 1'
CATEGORY_INFO	Stores the category info on the page. This allows displaying pages more quickly.
LAST_CATEGORY	Recently visited category ID in the '\$categoryID' format
VIEWED_PRODUCT_IDS	Recently viewed product IDs in '\$productId 1, \$productId 2, ..., productId N' format
currency	Code of the currency selected by a customer ('USD', 'UAH', 'GBP', etc.)
store	Store view code
NO_CACHE	Indicates whether it is allowed to use cache
LAST_PRODUCT	Last viewed product ID

If the Google Analytics module is enabled and using cookies is allowed by a customer, Magento stores the following Google Analytics cookies:

- \_utma
- \_utmb\_
- \_utmc
- \_utmz.

For a description of the Google Analytics cookies refer the official Google documentation.

## 4 Introducing the Frontend

In order to familiarize you with the features of the frontend, this chapter describes the basic browsing and purchasing features provided for your customers by a web store created using Magento CE. This knowledge will help you make better decisions when setting up your store.

### 4.1 Overview

The frontend provides the view of your web store that is publicly available to customers using the Internet. The frontend shows your product catalog and provides your customers with ordering, payment, and tracking features.

You can access the Magento demo web stores by navigating to <http://demo.magentocommerce.com>. The Single Store Demo is a sample Magento store that uses Magento's default theme and sample data. This sample store is referenced throughout this user guide.

You can access your own store by browsing to the address that you defined for it during installation.

The illustration in Figure 27 shows the first page of a default Magento CE store with sample data.

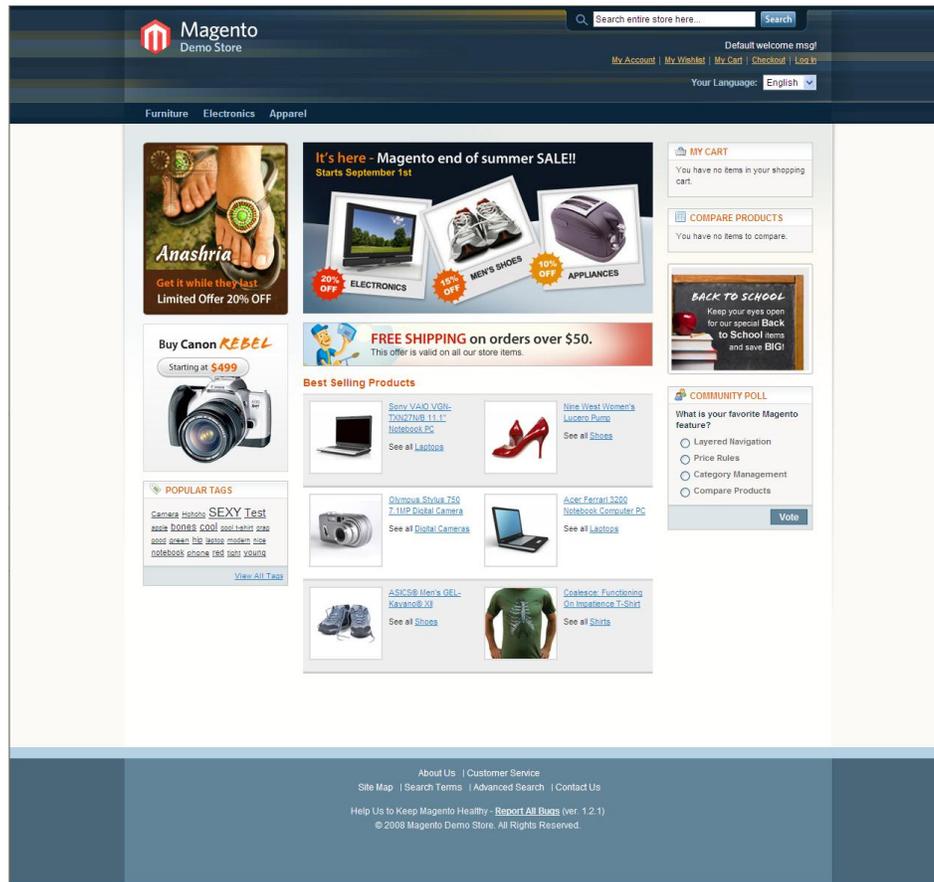


Figure 27. Magento CE Store Frontend

## 4.2 Finding the Right Products

The Magento CE frontend is also referred to in this guide as your *web store*. It provides a variety of options for browsing through the products offered and then drilling down to view detailed information about each product. Magento CE enables you to define the default appearance of how multiple products are presented, such as whether they are shown as a list or grid (table), their sort order, and the filter that is used.

### Categories

The products in the web store are grouped into *categories*, which are displayed in a bar near the top of the web store page. Each product can be assigned to one or more categories.

Categories can have multiple levels of subcategories. A customer can navigate to a subcategory using a category's dropdown menu. Figure 28 shows the five categories on the Magento CE demo store and the subcategories under **Electronics: Cell Phones**, **Cameras** and **Computers**:



Figure 28. Categories and Subcategories

A category or a subcategory can each have a product list or show a landing page that features some products. Figure 29 shows a category that has products:

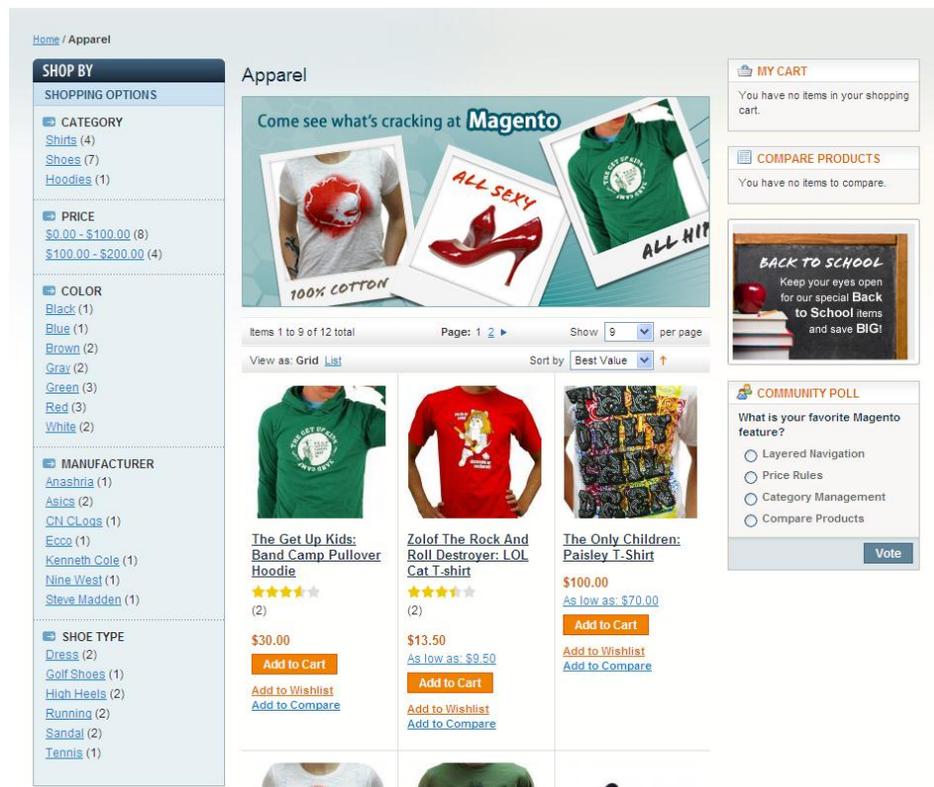


Figure 29. Category Page with Products

## Filtering the Display of Products

Typically, the first step of a customer when browsing through the web store may be to select the category or subcategory of the products of interest. The customer can then filter the products in that category according to the various attributes of these products.

The **SHOP BY** area on the left side of the frontend page provides a variety of product attributes that can be used to access the products in that category. The attributes in a category appear in groups, each with its own title. In the frontend page shown above, the groups that appear are **PRICE** (which shows ranges of prices), **COLOR**, **MANUFACTURER** and **SHOE TYPE**. Next to each attribute is the number of products that have that attribute.

For example: The **Apparel** category has three green products, as shown in Figure 30.



Figure 30. Category Product Counts

After a customer clicks on the **Green** attribute, all the green products are displayed in the web store for browsing and the **SHOP BY** area indicates that the products in this category have been filtered by the **Color: Green** attribute, as shown in Figure 31.

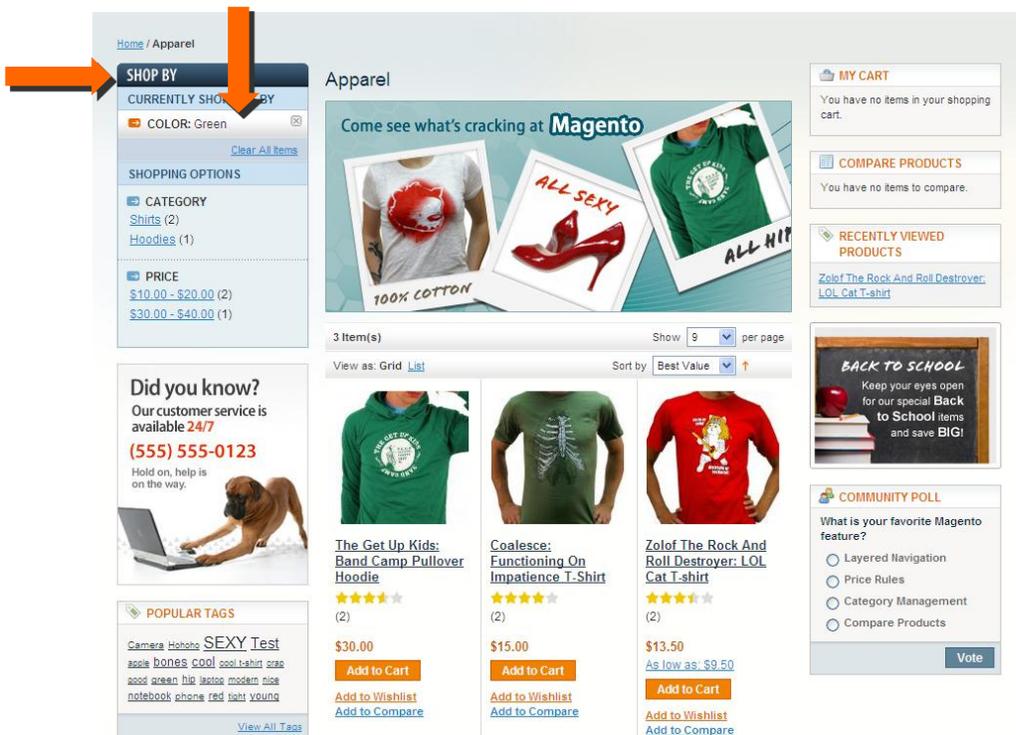


Figure 31. Filter Indication

To clear the filter and thus redisplay all the products in the currently selected category, click the **Clear** icon (🗑️) next to the filter, or click the **Clear All Items** option.

**Note:** The third product is shown because it contains two variants inside: a green and a red version.

## Popular Tags

Another option that Magento CE provides to help customers find the right product is called Popular Tags. Popular Tags provide another property that can be assigned to products that customers can select in order to view the products to which this tag has been assigned (see Figure 32).

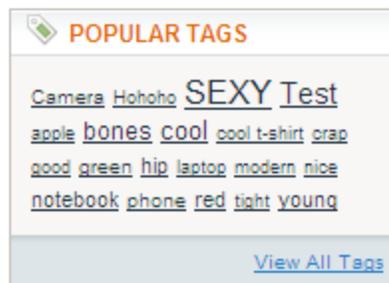


Figure 32. Popular Tags

Popular tags can be assigned by customers in the product page (see Figure 33) and can be approved and edited from the backend, if required.

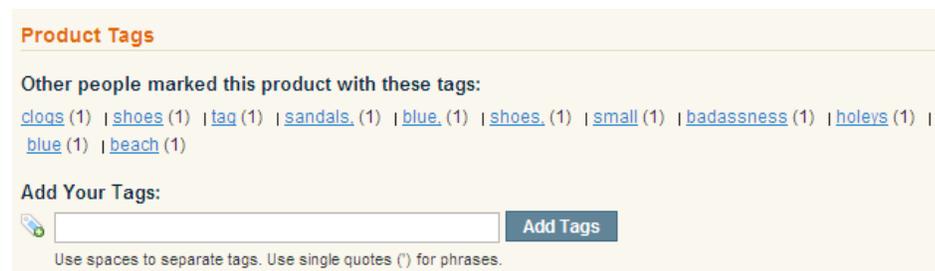


Figure 33. Adding a Tag to a Product

## Searching

The top right of your web store page provides a search field in which a customer can type all or part of the name of a product, or its attributes, in order to find it, as shown in Figure 34.

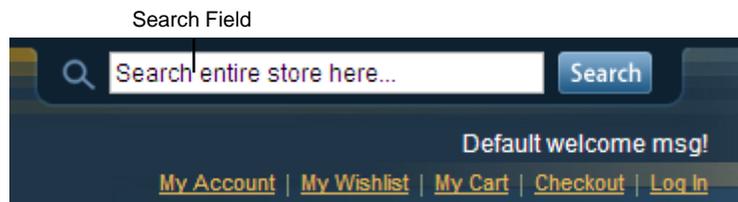


Figure 34. Search Tool

## Comparing Products

Magento CE enables customers to compare two or more selected products, as follows:

1. A customer first clicks the **Add to Compare** link provided for each product that he/she wants to compare, as shown in Figure 35.



Figure 35. Add to Compare Link

2. After selecting all the products to be compared, the customer then clicks the **Compare Items** button in the **COMPARE PRODUCTS** area, as shown in Figure 36.



Figure 36. Compare Products Area

The Compare Products page is then displayed in a pop-up window, as shown in Figure 37.

[Print This Page](#)

	 <p><b>The Get Up Kids: Band Camp Pullover Hoodie</b></p> <p>★★★★☆ (2)</p> <p><b>\$30.00</b></p> <p><a href="#">Add to Cart</a> <a href="#">Add to My Wishlist</a></p>	 <p><b>The Only Children: Paisley T-Shirt</b></p> <p><b>\$100.00</b> <i>As low as: \$70.00</i></p> <p><a href="#">Add to Cart</a> <a href="#">Add to My Wishlist</a></p>
<b>Model</b>	The Get Up Kids: Band Camp Pullover Hoodie	paisley
<b>SKU</b>	4fasd5f5	oc
<b>Short Description</b>	Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies.	Printed on American Apparel Classic style 5495 California cotton T shirt.
<b>Description</b>	Printed on American Apparel Classic style 5495 California Fleece Pull-Over Hoodies. Sizing info is available here.	<ul style="list-style-type: none"> <li>6.1 oz. 100% preshrunk heavyweight cotton</li> <li>Double-needle sleeves and bottom hem</li> </ul>
<b>Color</b>	Green	White
	<p><b>\$30.00</b></p> <p><a href="#">Add to Cart</a> <a href="#">Add to Wishlist</a></p>	<p><b>\$100.00</b> <i>As low as: \$70.00</i></p> <p><a href="#">Add to Cart</a> <a href="#">Add to Wishlist</a></p>

[Close Window](#)

Figure 37. Compare Products Page

**Note:** A row also appears for each comparable attribute defined for these products, such as Color. See “Managing Product Attributes,” page 90, for more information about defining attributes.

## Sorting Products

A customer can sort the products that are displayed by selecting the relevant option in the **Sort by** drop-down list, as shown in Figure 38.



Figure 38. Sort By Drop-down list

## Grid/List View

By selecting the **Grid** or **List** links at the top of the page, a customer can choose to view products displayed in a grid (table), as shown in Figure 38, or as a list, as shown in Figure 39.

View as: [Grid](#) [List](#) 

Sort by   

---



**[Anashria Womens Premier Leather Sandal](#)**

★★★★☆

[4 Review\(s\)](#)  
[Add Your Review](#)

**\$41.95** [Add to Cart](#)

Buckle embellished contrasting straps adorn both the heel and canvas covered wedge of this t-strap sandal to make it a truly unique addition to your wardrobe [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

---



**[ASICS® Men's GEL-Kayano® XII](#)**

**\$134.99** [Add to Cart](#)

The ASICS® GEL-Kayano® XII running shoe delivers the ultimate blend of cushioning and support. [Learn More](#)

[Add to Wishlist](#) | [Add to Compare](#)

Figure 39. List View

## Recently Viewed

The **RECENTLY VIEWED PRODUCTS** area (see Figure 40) lists the products that were recently viewed by the customer, whether they were purchased or not, and enables the customer to easily link back to them.

 **RECENTLY VIEWED PRODUCTS**

[CN Clogs Beach/Garden Clog](#)

[Anashria Womens Premier Leather Sandal](#)

[Zolof The Rock And Roll Destroyer: LOL Cat T-shirt](#)

Figure 40. Recently Viewed Products Area

## 4.3 Promotional Information

Magento CE provides a variety of aspects of product presentation that you can control and that enable you to promote and up-sell products to your customers.

## Product List Banners

You can define the banner that appears at the top of each category landing page with a static block (see Figure 41). This feature adds a graphical element to your category pages that can be used for special promotions, or to highlight certain products. Banners can be defined per category. More information about how to create and add static blocks on your site can be found in “Managing CMS Pages,” page 166.



Figure 41. Product List Banner

## Promotional Pages

Another way to feature products and promotions in your web store is a customized category landing page, which is a static HTML page that may be displayed while the user browsing a category, instead of showing a list of products. See Figure 42.

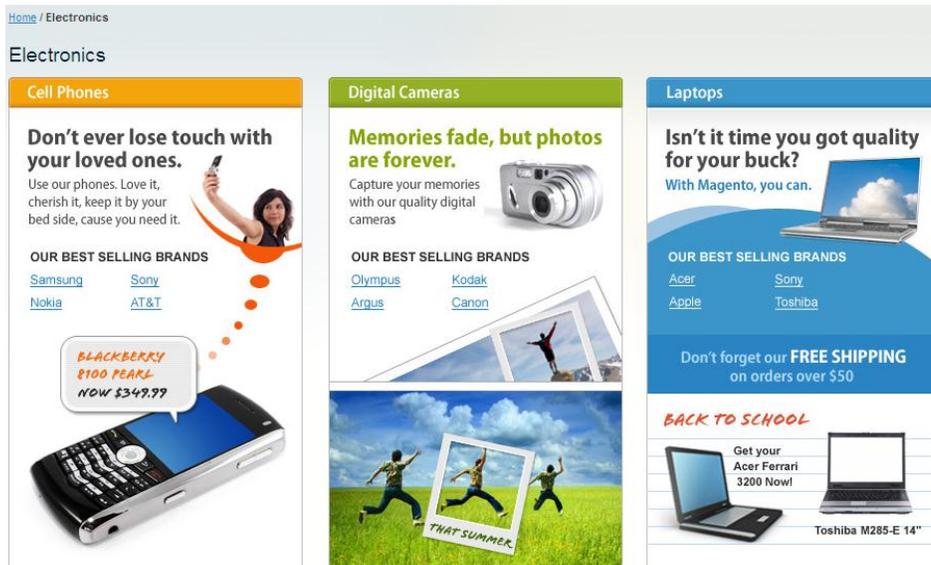


Figure 42. Promotional Page

## Up-sell Products

**Up-sell** products are items that your customer could buy *instead* of the product that is being viewed. These products may be more expensive, of higher quality, or more popular, or produce a higher profit margin.

The example in Figure 43 presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.



Double click on above image to view full picture

−

+

**Microsoft Natural Ergonomic Keyboard 4000**

[Be the first to review this product](#)

Availability: In stock.

**\$99.99**

Qty:  Add to Cart OR [Add to Wishlist](#)  
[Add to Compare](#)

---

**Quick Overview**

The most comfortable ergonomic keyboard on the market!  
We just made a great deal for this Microsoft Natural ergonomic keyboard.

**Product Description**

The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy-access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!

**You may also be interested in the following product(s)**

 <p><b><u>Logitech diNovo Edge Keyboard</u></b></p> <p><b>\$239.99</b></p>	 <p><b><u>Computer</u></b></p> <p>From: <b>\$447.98</b> To: <b>\$4,477.92</b></p>	 <p><b><u>Gaming Computer</u></b></p> <p>From: <b>\$4,999.95</b> To: <b>\$6,348.95</b></p>
---	--	--

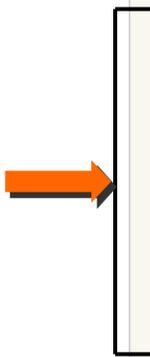


Figure 43. Up-Sell Products

## Related Products

Related products are meant to be purchased *in addition* to the item the customer is viewing. Related products are shown in the right column of your web store in a separate block. The example in Figure 44 shows various mobile phones promoted as related products.

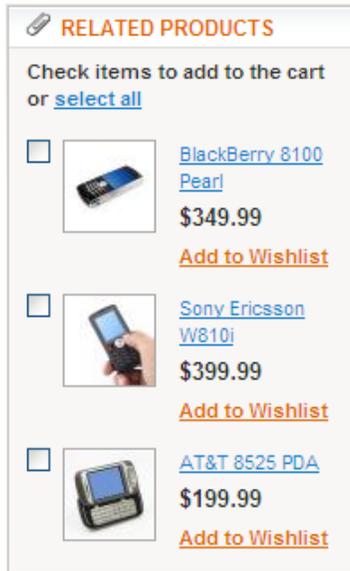


Figure 44. Related Products

## Cross-sell Products

Cross-sell products appear next to the shopping cart. When a customer navigates to the shopping cart page (whether automatically after adding a product or otherwise), these products are displayed as cross-sells to the items already in the shopping cart. They are similar to **impulse buys**, like magazines and candy at the cash registers in grocery stores. See Figure 45.



Figure 45. Cross-Sell Item

## Product Pages

The backend enables you to define the type of information and functionality that is provided in a product's page. Figure 46 shows a typical product page.

The screenshot shows a product page for 'The Get Up Kids: Band Camp Pullover Hoodie'. The main content area includes a product image with a zoom slider, a price of \$30.00, and 'Add to Cart' and 'Add to Wishlist' buttons. Below the image is a 'Quick Overview' section. The page also features a 'Product Description', 'Additional Information' table, a 'You may also be interested in the following product(s)' section with two product cards (Apple MacBook Pro and Akio Dresser), and a 'Product Tags' section with a tag input field. On the right sidebar, there are sections for 'MY CART', 'COMPARE PRODUCTS', 'RECENTLY VIEWED PRODUCTS', 'RECENTLY COMPARED PRODUCTS', and a 'COMMUNITY POLL'.

Figure 46. Product Page

Most of the features provided to present a product in your web store are self-explanatory. The following describes a few of these features:

- ❖ **Image:** The customer can use the slider to zoom in and out of the image, click on it to enlarge it, or pan it to see different parts of it.

- ❖ **Description:** The top of the page shows a short description in the **Quick Overview** area, and farther down you can see a more detailed **Product Description** area. Also, **Additional Information** details are provided about the product in the form of a table.
- ❖ **Product Tags:** Shows the tags assigned to this product. Customers can navigate to other products by clicking on one of these tags. You can also define whether customers can add tags.
- ❖ **Reviews:** Your customers can rate and review your products. The store administrator can approve or remove reviews.
- ❖ **Product Options:** Magento provides a variety of controls that enable you to configure the product options that appear for a customer to select, such as check boxes, drop-down lists, and so on. For example, customers are able to select the size of a shoe, as shown in Figure 47.

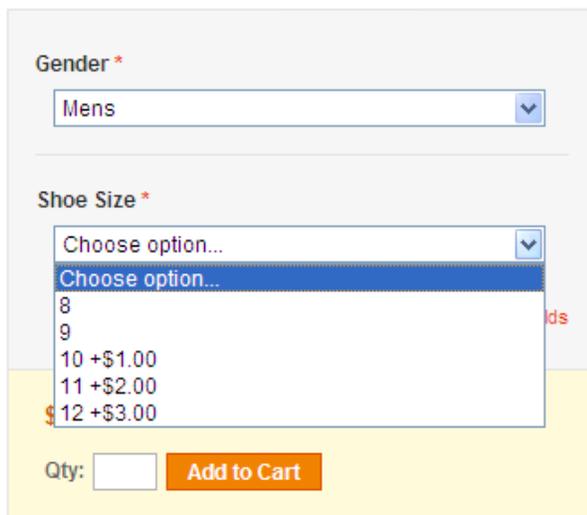


Figure 47. Product Options

## 4.4 Web Store Page Header and Footer

Every web store has a header that appears at the top of each page and a footer that appears at the bottom of each page. These features enable you to control the look and feel of your web store and provide the customer with various functions, as described in this section.

## The Header

The default header of each of your web store pages shows your web store logo and banner. An example is shown in Figure 48.

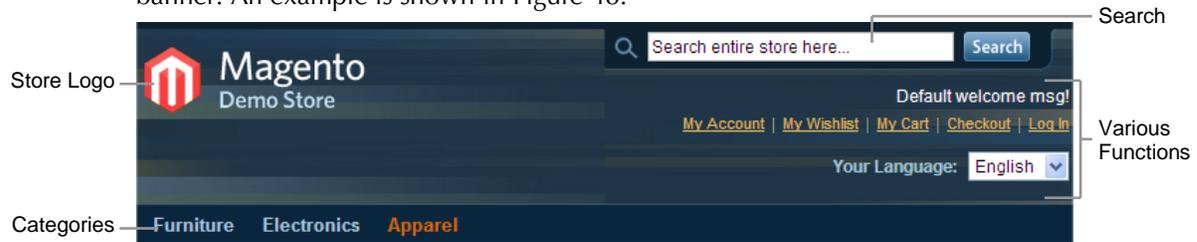


Figure 48. **Web Store Header**

This header also provides a variety of functions on the right, as follows:

- ❖ **My Account:** Enables registered customers to access their order history, track their shipments, download products, and change address information.
- ❖ **My Wish List:** Enables customers to define a list of items that they may want to purchase in the future. They can also share their wish list with their friends.
- ❖ **My Cart:** Enables customers to see the products that they have selected to purchase.
- ❖ **Checkout:** Enables customers to start the checkout process in order to specify payment, billing, and shipping information.
- ❖ **Log In:** Enables customers to identify themselves.
- ❖ **Log Out:** Enables customers to log out of their accounts.

## The Footer

The bottom of each of your web store pages includes a footer (see Figure 49).



Figure 49. **Web Store Footer**

This footer generally provides links to various informational and functional pages in the site, such as **Contact Us** and the **Site Map**.

## 4.5 Purchasing Functionality

### Wishlist

The Wishlist feature enables customers to pick out products which they are interested in, but not ready to order yet. Products can be moved from the wishlist to the shopping cart with one click. Customers can also share the Wishlist their friends right from the Wishlist section of the My Account page. The Wishlist feature is available for registered customers only.

### My Cart

To add a product to your shopping cart, click on the **Add to Cart** button for that product, as shown in Figure 50.

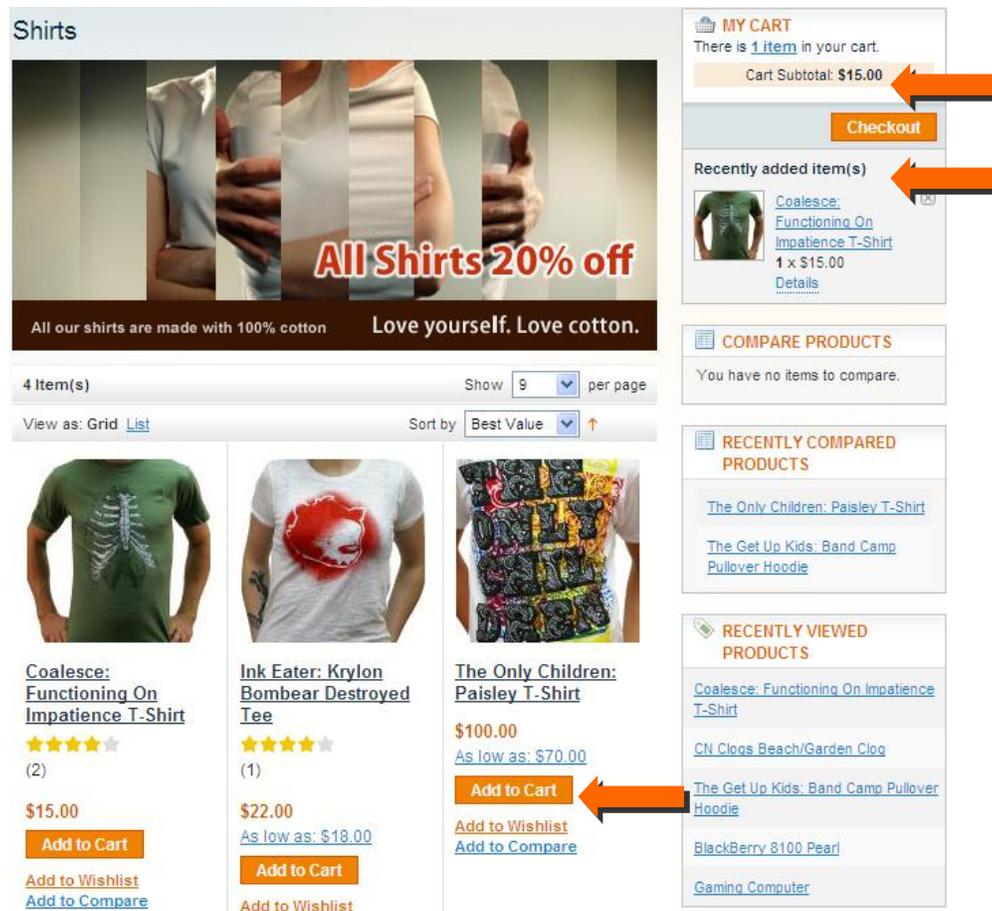


Figure 50. Add to Cart Button

The **My Cart** area shown in Figure 50 displays a brief list of the products in your shopping cart. The **Recently Added items(s)** area shows a list of the last three items added to your shopping cart.

## Clearing My Cart

A customer who wants to remove all items from the shopping cart can do so by clicking the **Clear Shipping Cart** button on the Shopping Cart page (see Figure 51).



Figure 51. Clearing the Shopping Cart

## Checking Out

The **My Cart** area also provides a **Checkout** button (see Figure 52) that takes a customer to the first step of the one-page checkout process (see Figure 53).

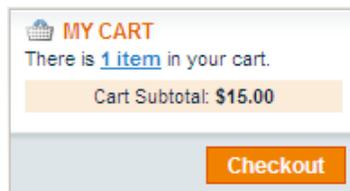


Figure 52. My Cart Area

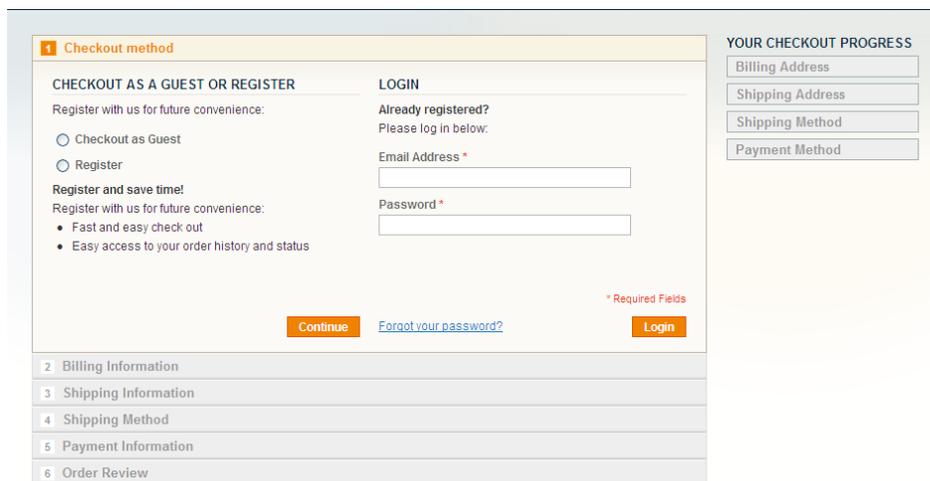


Figure 53. Checking Out

Most of the functionality of the checkout process is available by default. In addition, the backend provides a variety of options to customize the customer checkout process, such as various payment and shipping methods that can be offered to your customers.

A customer can make a one-time purchase as a guest or can register and create an account. Customers that have created an account can later track the status of their orders.

**Tip:** Magento CE also provides multi-shipping functionality that enables customers to ship items to more than one address at the same time. This is a very useful feature for sending gifts, for example. This feature can be configured under **System > Configuration > SALES > Shipping Settings > Options**.

**Tip:** Customers can also register and create an account by using the **My Account** or **Log In** link on the top right of each page.

Figure 54 shows an example of checking out as a guest by selecting the **Checkout as Guest** option in the step above

Click **Continue** to see the next step in which the customer can enter the billing and identification information.

The screenshot displays the 'Billing Information' step of a checkout process. The form contains the following fields and options:

- First Name \*** and **Last Name \*** (text input)
- Company** (text input)
- Email Address \*** (text input)
- Address \*** (text input)
- City \*** (text input)
- State/Province \*** (dropdown menu with 'Please select region, state or province')
- Zip/Postal Code \*** (text input)
- Country \*** (dropdown menu with 'United States')
- Telephone \*** (text input)
- Fax** (text input)

Shipping options:  Ship to this address,  Ship to different address

Buttons: **Continue** (orange), **Back** (grey)

Progress bar (YOUR CHECKOUT PROGRESS):

- 1 Checkout method
- 2 **Billing Information** (highlighted)
- 3 Shipping Information
- 4 Shipping Method
- 5 Payment Information
- 6 Order Review

Figure 54. Checkout as Guest

Click **Continue** to specify the **Shipping Address**, select the **Shipping Method**, and select the **Payment Method**.

The last step of the checkout process enables the customer to review the entire order, as shown in Figure 55.

1	Checkout method
2	Billing Information
3	Shipping Information
4	Shipping Method
5	Payment Information
6	<b>Order Review</b>

Product Name	Price	Qty	Subtotal
Coalesce: Functioning On Impatience T-Shirt	\$15.00	1	\$15.00
Size Small			
		Subtotal	\$15.00
		Shipping & Handling (Flat Rate - Fixed)	\$5.00
		Tax	\$1.24
		<b>Grand Total</b>	<b>\$21.24</b>

Forgot an Item? [Edit Your Cart](#)

**Place Order**

**YOUR CHECKOUT PROGRESS**

[Billing Address](#) | [Change](#)

Test User  
Company  
test street 1  
test street 2  
Test City, California, 90123  
United States  
T: 123-123-1234

[Shipping Address](#) | [Change](#)

Test User  
Company  
test street 1  
test street 2  
Test City, California, 90123  
United States  
T: 123-123-1234

[Shipping Method](#) | [Change](#)

Flat Rate - Fixed \$5.00

[Payment Method](#) | [Change](#)

Check / Money order

Figure 55. **Order Review**

**Note:** The right column shows the summary of information entered during the previous checkout steps and enables you to change any of the information that is incorrect.

Customers then confirm the order and receive an order number, or they can change their minds and edit their carts using the **Edit Your Cart** link. If they proceed with the order and the payment is processed successfully, then a “Thank You” page is displayed, as shown in Figure 56.

**Your order has been received**

---

Thank you for your purchase!

Your order # is: [100011640](#).

You will receive an order confirmation email with details of your order and a link to track its progress. Click [here to print](#) a copy of your order confirmation.

**Continue Shopping**

Figure 56. **“Thank You” Page**

A confirmation email can be sent to the customer. An example is shown in Figure 55. The confirmation email can be configured by under **System > Configuration > Sales Emails**.



**Hello Test Customer,**

Thank you for your order from Main Website Store. Once your package ships we will send an email with a link to track your order. You can check the status of your order by [logging into your account](#). If you have any questions about your order please contact us at [dummyemail@magentocommerce.com](mailto:dummyemail@magentocommerce.com) or call us at (555) 555-0123 Monday - Friday, 8am - 5pm PST.

Your order confirmation is below. Thank you again for your business.

**Your Order #100000021** (placed on May 23, 2009)

<b>Billing Information:</b> Test Customer Test Street Test City, California, 90123 United States T: 123-123-1234	<b>Payment Method:</b> Name on the Card: Test Customer Credit Card Type: Visa Credit Card Number: xxxx-1111 Expiration Date: 03/2011																								
<b>Shipping Information:</b> Test Customer Test Street Test City, California, 90123 United States T: 123-123-1234	<b>Shipping Method:</b> Flat Rate - Fixed																								
<table border="1"><thead><tr><th>Item</th><th>SKU</th><th>Qty</th><th>Subtotal</th></tr></thead><tbody><tr><td>DVD player</td><td>3003</td><td>1</td><td>\$150.00</td></tr><tr><td></td><td></td><td>Subtotal</td><td>\$150.00</td></tr><tr><td></td><td></td><td>Shipping &amp; Handling</td><td>\$5.00</td></tr><tr><td></td><td></td><td>Tax</td><td>\$12.38</td></tr><tr><td colspan="3"><b>Grand Total</b></td><td><b>\$167.38</b></td></tr></tbody></table>		Item	SKU	Qty	Subtotal	DVD player	3003	1	\$150.00			Subtotal	\$150.00			Shipping & Handling	\$5.00			Tax	\$12.38	<b>Grand Total</b>			<b>\$167.38</b>
Item	SKU	Qty	Subtotal																						
DVD player	3003	1	\$150.00																						
		Subtotal	\$150.00																						
		Shipping & Handling	\$5.00																						
		Tax	\$12.38																						
<b>Grand Total</b>			<b>\$167.38</b>																						

Thank you again,  
**Main Website Store**

Figure 57. Confirmation Email

## 4.6 Managing Customer Relations

### Customer Emails

Magento CE can send a variety of automatically generated customer emails (such as when a customer places an order or opens an account) and enables you to customize them as you require. For more information about customizing the emails sent from the store to customers see “Customizing Transactional Emails,” page 169.

### Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to give their opinions, feedback, and comments about products. They appear in the frontend, as shown in Figure 58.



Figure 58. Ratings and Reviews

The number of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual textual reviews provided by customers. For more details, see “Managing Ratings and Reviews”, page 229.

## Community Polls

Each web store can provide a Community Poll, as shown in Figure 59. For more details, see “Managing Polls,” page 234.



Figure 59. Community Poll



## 5 Introducing the Backend

In order to familiarize you with the features of the backend, this chapter describes the ongoing management tasks that you can perform in the backend while running your Magento web store on a day-to-day basis.

See “Accessing the Backend,” page 23, for details on logging in to your store’s backend.

See “Setting Up Your Catalog,” page 71, for a full description of how to set up your catalog. Each of the subsequent chapters features a description of the other aspects of customizing your backend.

### 5.1 Understanding Scope

Magento CE enables you to organize your operations into multiple websites, stores, and store views. (See “Store Hierarchy,” page 25, for descriptions of these terms.) Many of the configuration pages in the backend enable you to select the website, store, or store view that you want your configuration changes to apply to. Selecting the website, store, or store view is known as selecting the *scope* of your changes.

To select the scope for configuration changes, use the **Current Configuration Scope** drop-down list in the upper left corner of the configuration page, as shown in Figure 60.

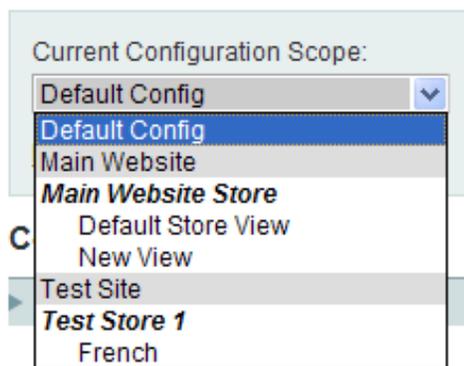


Figure 60. Selecting Configuration Scope

If you select **Default Config**, the option choices you make are applied as default values for all websites, stores, and store views.

On the configuration pages, you will see scope indicators to the right of each option. These indicate the lowest level of the hierarchy at which you can set the value of these options. For example, the value of the **Default Display Currency** option may be set at the default (global) level, but can be overridden at the store view level, as indicated by the “[STORE VIEW]” indicator for that option (see Figure 61).

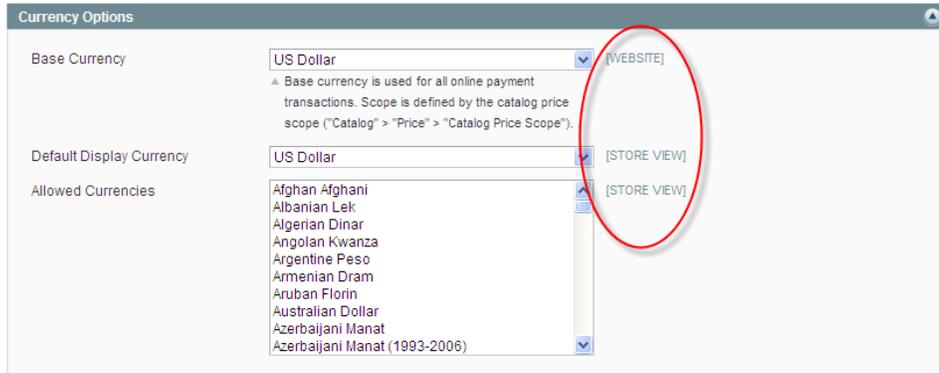


Figure 61. Scope Indicators

## 5.2 Managing Administrator Messages

When you log in to the backend, any new messages are displayed in a pop-up box. Typically, these messages are notifications of new Magento CE or extension releases. You can manage these messages much like you would manage your email.

To display all the messages in your inbox:

Click the **Go to messages inbox** on the top right of the page. The Messages Inbox page is displayed, which provides standard message handling features (see Figure 62).

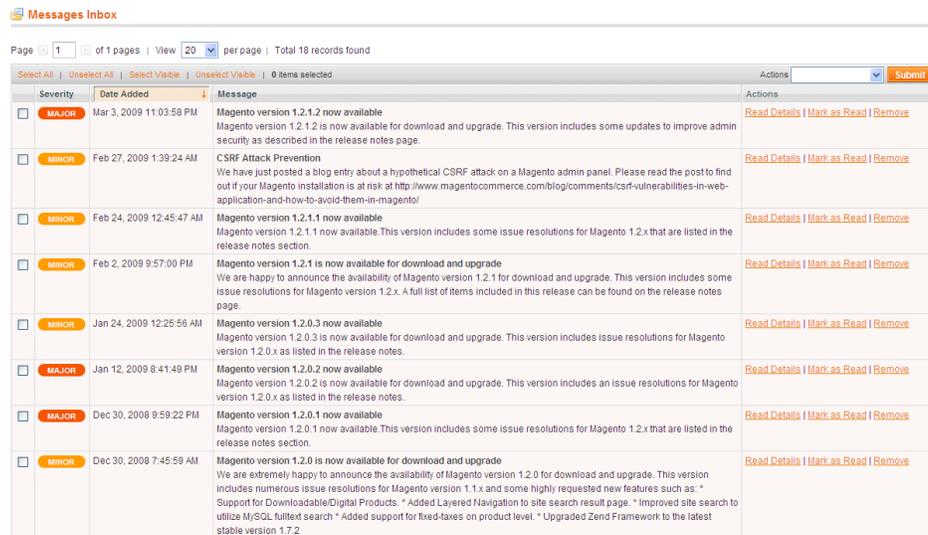


Figure 62. Messages Inbox Page

You can mark selected messages as **Read** so that they do not appear again when you log in. You can also **Remove** marked messages so that they are permanently deleted.

## 5.3 Supervising Web Store Activities

The Dashboard (Figure 63) is the first page to be displayed by default after you log in. It can also be accessed by clicking **Dashboard** on the Admin Panel top menu.

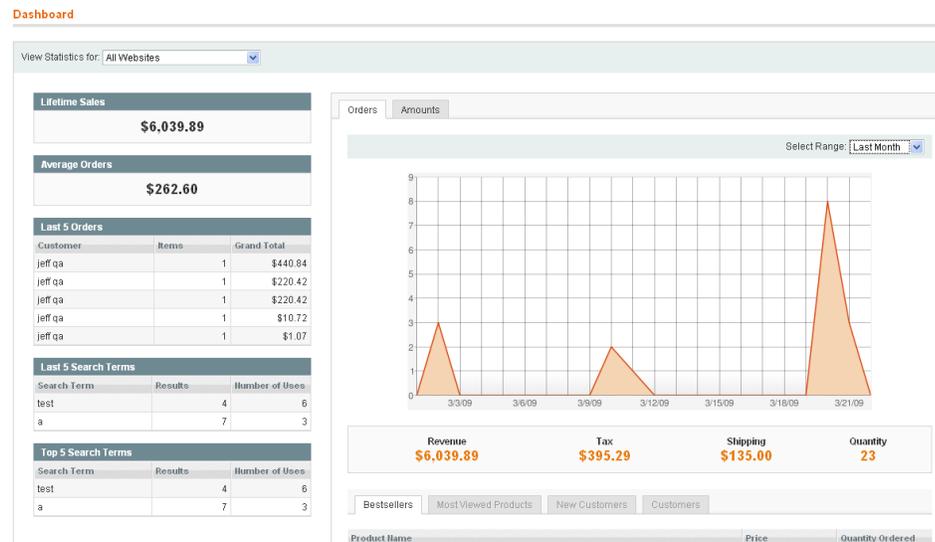


Figure 63. Dashboard

This page shows you basic information and statistics for managing your web store. The following describes the options in this page:

### Chart

**Orders tab:** The **Orders** tab in the center of the page shows a graph that indicates the quantity of orders being processed in your web store for each point on the time scale within the specified range. The range is selected in the **Select Range** drop-down list at the top of the chart. Underneath you can see the revenue, tax and shipping amounts of your orders and the total quantity of the orders. Only orders for which at least one invoice, shipment, or credit memo has been created or which have been created from external gateways (for example, PayPal Express) are included in the reports.

**Amounts tab:** The **Amounts** tab in the center of the page shows a graph indicating the revenue for each point on the time scale within the specified range. The range is selected in the **Select Range** drop-down list at the top of the chart.

**Revenue, Tax, Shipping, and Quantity:** These statistics are calculated as follows:

- ❖ Revenue = Total Invoiced Amount - Tax Invoiced Amount - Shipping Invoiced Amount - (Total Refunded Amount - Tax Refunded Amount - Shipping Refunded Amount)
- ❖ Tax = Tax Invoiced Amount - Tax Refunded Amount
- ❖ Shipping = Shipping Invoiced Amount - Shipping Refunded Amount

**Note:** Charts can be enabled or disabled under [System > Configuration > ADVANCED > Admin > Dashboard](#).

## Left Information Panel

The panel on the left shows you the total amount of orders handled in your Magento CE web store, the average amount of each order, information about your last five orders, and the last five and top five search terms.

## Bottom Information Tabs

The bottom of the Dashboard (Figure 64) provides additional information about your web store, as follows:



Product Name	Price	Number of Views
The Get Up Kids: Band Camp Pullover Hoodie	\$30.00	5
CN Clogs Beach/Garden Clog	\$15.99	2
Computer		2
Gaming Computer	\$4,999.95	2
Coalesce: Functioning On Impatience T-Shirt	\$15.00	2

Figure 64. **Additional Dashboard Information**

- ❖ **Bestsellers Tab:** Shows a list of the best-selling products in your web store, their price, and the quantity ordered.
- ❖ **Most Viewed Products Tab:** Shows a list of the most recently viewed products and the number of times they were viewed.
- ❖ **New Customers:** Shows a list of the most recently registered customers.
- ❖ **Customers:** Shows a list of your top customers, meaning the customers that have ordered the most items from your web store in the last year.

## 5.4 Managing Orders

This section first describes how to view and manage orders, as well as how to create orders from the backend.

## Viewing the Orders in Your Web Store

To view the orders in your web store:

In the Admin Panel, select **Sales > Orders** to display the Orders page, as shown in Figure 65.

Order #	Purchased from (store)	Purchased On	Bill to Name	Ship to Name	G.T. (Base)	G.T. (Purchased)	Status	Action
100000002	Main Website Main Store English	Mar 22, 2009 12:24:43 AM	Test User	Test User	\$21.24	\$21.24	Pending	<a href="#">View</a>
100000001	Main Website Main Store English	Mar 22, 2009 12:24:10 AM	Test User	Test User	\$21.24	\$21.24	Pending	<a href="#">View</a>

Figure 65. Orders Page

This page displays a list of the orders placed in your web store.

The following describes some of the options for managing orders in this page:

- ❖ **Quantity of Orders Displayed:** The top part of the page enables you to control how many orders are displayed in the page, as shown in Figure 66.

Page 1 of 1 pages | View 20 per page | Total 2 records found | [New Order RSS](#)

Figure 66. Order Display Controls

- ❖ **Selecting Orders:** The area under the order display controls enables you to select/unselect all the orders in your web store or to select/unselect all the orders currently visible, meaning those that are currently displayed in this page.

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

Figure 67. Order Selection Controls

**Note:** You can also select individual orders by selecting the check box on the left of each order.

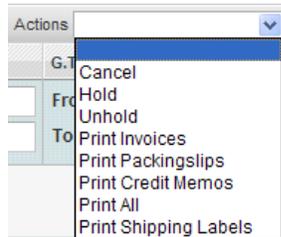
- ❖ **Filtering Orders:** The area under the order selection controls enables you to filter the orders that are displayed by specifying values in one or more of the fields and then clicking **Search**. To display all orders, click **Reset Filter**.

Filtering Sorting

Figure 68. Filtering Controls

**Note:** The list displays only those orders that meet all the criteria that you specified.

- ❖ **Sorting orders:** Click on the header of a column to sort the orders by the value of that column. Each click toggles between an ascending sort and a descending sort.
- ❖ **Order actions:** The **Actions** drop-down list provides a list of actions that may be performed on the selected orders. The actions that can be performed include the following:



- **Cancel:** Sets the order status to **Canceled** and disables any further processing.
  - **Hold:** Puts the order on hold. The order is not affected in any way, but no further action may be performed unless you release it from Hold status.
  - **Unhold:** Releases the order from Hold status.
  - **Printing options:** These options enable you to print various documents related to the order.
- ❖ **Viewing an order:** To view and/or edit an existing order, click row for the desired order or click the **View** option in the order's row in the **Action** column. The Order View page opens, showing details about the order.

## Viewing an Order's Details

Magento CE provides a large variety of information for each order. This section provides a quick review of some of the information provided for an existing order. The navigation bar at the top of the Order View page enables you to access the various sections:

**Information, Invoices, Credit Memos, Shipments, Comments History, and Transactions.**

### Information Page

This page provides an overview of the most important information about the order, such as the current status of the order, the products ordered, customer information, billing, shipping, and payment information.

The screenshot displays the 'Order Information Page' for Order # 100000002, dated Jun 18, 2011 4:49:53 PM. The page is divided into several sections:

- Order Confirmation:** A green banner at the top states 'The order has been created.' Below it, the order number and date are shown, along with action buttons: Back, Edit, Cancel, Send Email, Hold, Invoice, Ship, and Reorder.
- Order # 100000002 (the order confirmation email is not sent):** A summary table showing:
 

Order Date	Jun 18, 2011 4:49:53 PM
Order Status	Pending
Purchased From	Main Website Main Website Store Default Store View
- Account Information:** Customer Name: Vincent Van Gogh; Email: vinnie@vangogh.com; Customer Group: General.
- Billing Address:** Vincent Van Gogh, 131 N Main St, Sherman Oaks, California, 91423, United States. T: 818-555-5555.
- Shipping Address:** Vincent Van Gogh, 131 N Main St, Sherman Oaks, California, 91423, United States. T: 818-555-5555.
- Payment Information:** Check / Money order; Order was placed using USD.
- Shipping & Handling Information:** Flat Rate - Fixed \$5.00.
- Items Ordered:** A table with columns: Product, Item Status, Original Price, Price, Qty, Subtotal, Tax Amount, Tax Percent, Discount Amount, Row Total.
 

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Product 3 SKU: 333	Ordered	\$150.00	\$150.00	Ordered 1	\$150.00	\$0.00	0%	\$0.00	\$150.00
- Comments History:** A section for adding and managing comments. It includes a 'Status' dropdown (set to Pending), a 'Comment' text box, and checkboxes for 'Notify Customer by Email' and 'Visible on Frontend'. A 'Submit Comment' button is present. Below, a list shows a comment from 'Jun 18, 2011 4:49:54 PM | Pending' with the note 'Customer Not Notified'.
- Order Totals:** A summary table:
 

Subtotal	\$150.00
Shipping & Handling	\$5.00
<b>Grand Total</b>	<b>\$155.00</b>
Total Paid	\$0.00
Total Refunded	\$0.00
<b>Total Due</b>	<b>\$155.00</b>

Figure 69. Order Information Page

**Note:** The SKU (Stock Keeping Unit) specifies the product code that is used to keep track of the actual inventory. SKUs are defined during product creation. For details about managing your product catalog, see “Setting Up Your Catalog,” page 71.

The **Comments History** area of this page provides information about the lifecycle of the order. Every time that an invoice, shipment, or credit memo document is created, a record with each document’s identification is added on this tab. Also, here you can find out whether the customer was notified about the creation of each order document. For each partial refund, the system provides the order amount to be returned to the customer. You can change order status in the **Status** drop-down list.

To add a comment to the order:

1. Specify the comment text in the **Comment** text box.
2. If you want to send the comment to the customer by email, select the **Notify Customer by Email** check box.
3. If you want to make the comment visible in the order view on the frontend, select the **Visible on Frontend** check-box to specify that the customer is sent a copy of the comments that you add in the Comment box.
4. Click **Submit Comment**.

All comments are stored on the Comments History page. To open it, click the Comments History tab on the left.

## Invoices Page

An invoice represents a confirmation of payment. The Invoices page enables you to view the list of invoices generated for an order.

You can generate an invoice individually or together with a shipment. If the products in an order are shipped in multiple shipments, then an invoice is generated for each shipment for the products in that shipment.

## Credit Memos

The Credit Memos page displays a list of the refunds given for products in this order. You can click on a credit memo in the list to display the refund details.

## Shipments Page

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be created per order.

The Shipment page displays a list of the shipments sent for products in this order. You can click on a shipment in the list to display the shipment details.

On the Shipment page, you can also add tracking numbers that were received from shipping service providers. The tracking number enables customers to learn the status of the shipments in their orders using the **My Account** option that appears in the header of the frontend. For the supported shipping service providers you can create and print shipping labels from the Shipment page.

## Comment History Page

The Comment History page enables you to view a list of comments that have been added to the order record over the course of its life cycle. It is a good practice to add comments at every stage of the order, especially if problems come up.

## Transactions Page

The Transactions page enables you to view a list of transactions that are associated with this order.

## Creating New Orders

You may want to create an order using the backend, for example when an order is received over the phone.

**Tip:** Typically, orders are placed by customers in the frontend. In addition, you can create orders in the backend. This enables you to take orders by phone, mail or fax and then enter them into your web store to be managed and tracked. This feature is useful for call center operators to take orders directly from your customers. The ordering process in the backend is not much different from the one your customers experience. The backend provides all the same functions that your customers have when creating an order from your web store, including the ability to move products between the shopping cart and wishlist. It also enables you to give customers special prices and discounts.

To create a new order from the backend:

1. Select **Sales > Orders**.
2. Click the **Create New Order** button on the top right.

A full description of this procedure is provided in “Managing Orders,” page 221.

## 5.5 Managing Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to submit their opinions, feedback, and comments about products. Product reviews and ratings can also be added using the backend. To access the ratings and reviews management features, select **Catalog > Reviews and Ratings**.

For more information about ratings and reviews, see “Managing Customer-Generated Content,” page 229.

## 5.6 Generating Reports

Magento CE provides a variety of reports that you can access at any time. These reports are available under the **Reports** menu at the top of the Admin Panel.

Some of the most important reports are described in “Reports,” page 237.

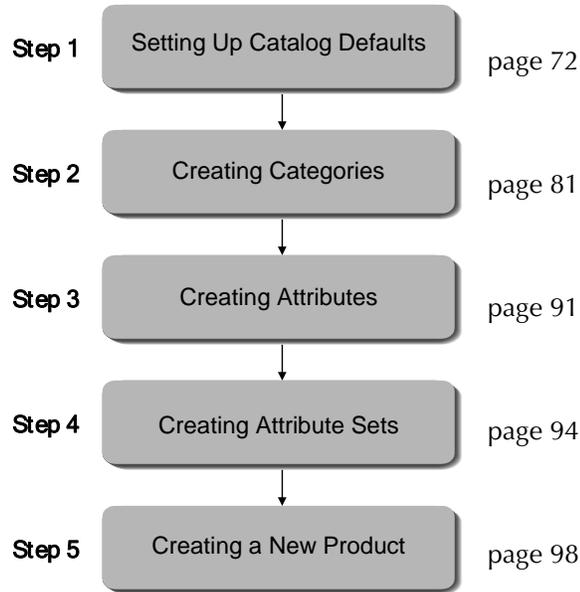


# 6 Setting Up Your Catalog

This chapter describes how to create a catalog for your Magento CE web store, how to add products, and how to define their attributes.

## 6.1 Overview

The best workflow for creating your products is as follows:



The following describes the process depicted above:

- ❖ **Step 1:** “Setting Up Catalog Defaults,” page 72. This step describes how to set basic catalog default configurations that define its behavior.
- ❖ **Step 2:** “Creating Categories,” page 81. The next step is to create the categories that will contain your products. Each product can be assigned to one or more categories.

A Magento CE store with Sample Data provides three such categories: **Furniture**, **Electronics**, and **Apparel**. Categories can have multiple levels of subcategories. A customer can click on a category to see a drop-down list of subcategories, such as **Cell Phones**, **Cameras**, and **Computers**, as shown in Figure 70.



Figure 70. Categories and Subcategories

- ❖ **Step 3: Creating Attributes**, page 91. Next, you can create the attributes that represent a product's characteristics. Attributes are a powerful Magento CE concept to make finding and comparing products easier.
- ❖ **Step 4: Creating Attribute Sets**, page 94. Attribute sets are logical groups of attributes that simplify the process of assigning attributes to a product. They do not appear in the front-end user interface.
  - **Creating a New Attribute Group**, page 96. Part of the process of creating an attribute set is to create attribute groups. These groups determine how attributes appear in the backend when defining a product.
- ❖ **Step 5: Creating a New Product**, page 98. This step shows how to fill in product information in order to maximize conversion and how to assign Categories to help customers navigate to the products of interest to them. Attribute sets and attributes are assigned to products to describe them, provide multiple options and help the customer search through the product list.

## 6.2 Setting Up Catalog Defaults

The first step to creating your catalog is to configure the catalog system default settings. In many cases, these settings can be overridden at lower levels (such as in individual categories and products).

### To configure catalog defaults:

In the Admin Panel, select **System > Configuration > CATALOG > Catalog**. In the **Current Configuration Scope** drop-down, select the scope of this configuration. The following describes some of the more important sections in the page.

### Frontend

This section determines how your products are shown on the frontend catalog pages.

Frontend	
List Mode	Grid (default) / List [STORE VIEW]
Products per Page on Grid Allowed Values	9,15,30 [STORE VIEW] ▲ Comma-separated.
Products per Page on Grid Default Value	9 [STORE VIEW] ▲ Must be in the allowed values list.
Products per Page on List Allowed Values	5,10,15,20,25 [STORE VIEW] ▲ Comma-separated.
Products per Page on List Default Value	10 [STORE VIEW] ▲ Must be in the allowed values list.
Allow All Products per Page	No [STORE VIEW] ▲ Whether to show "All" option in the "Show X Per Page" dropdown.
Product Listing Sort by	Best Value [STORE VIEW]
Use Flat Catalog Category	No [GLOBAL]
Use Flat Catalog Product	No [GLOBAL]
Allow Dynamic Media URLs in Products and Categories	Yes [STORE VIEW] ▲ E.g. {{media url="path/to/image.jpg"}} {{skin url="path/to/picture.gif"}}. Dynamic directives parsing impacts catalog performance.

Figure 71. Catalog Frontend Configuration

#### ❖ List Mode

- **Grid Only:** The products are displayed only in a grid structure.
- **List Only:** The products are displayed only in a list.
- **Grid (Default)/List:** The products are displayed in a grid structure by default, but your customers are able to switch to list.
- **List (Default)/Grid:** The products are displayed in a list structure by default, but your customers are able to switch to grid.

#### ❖ Products per Page: For each display type (List and Grid), specify the following:

- Specify, in a comma-separated list, what the options are for the number of products to display on a product page. These options will be listed in a drop-down list on the frontend.
- Specify how many products are displayed on a page by default.

#### ❖ Allow All Products per Page: Select whether the customers are allowed to display all products on a single category page.

#### ❖ Product Listing Sort By: The products are sorted, by default, by the selected attribute. The **Best Value** products are featured products as determined by the store administrator; for more information, see “Creating Categories,” page 81. The customer can select from the other options on a per-page basis.

You can configure attributes to be used for sorting using the **Used for Sorting in Product Listing** setting of an attribute. For details, see “Managing Product Attributes,” page 90.

- ❖ **Use Flat Catalog Category:** Selecting **Yes** “flattens” multiple category database tables into a single table for increased performance on the frontend. Magento recommends selecting **Yes** for any size catalog.
- ❖ **Use Flat Catalog Product:** Selecting **Yes** “flattens” multiple product database tables into a single table for increased performance on the frontend. Magento recommends selecting **Yes** if your catalog contains more than 1,000 SKUs
- ❖ **Allow Dynamic Media URLs in Products and Categories:** Selecting **No** can improve performance

## Sitemap

This section determines how your site map is displayed to customers.

- **Use Tree Like Category Sitemap:** Selecting **Yes** displays the site map as a tree, showing all categories and subcategories as branches. Selecting **No** displays the categories and subcategories in a single column.
- **Minimum Lines per Page:** Determines the number of lines on each page when the site map is distributed among several pages.

## Product Reviews

This section enables unregistered guests in your store to write product reviews.

## 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. For more information on how to configure email templates and email sender addresses, see “Customizing Transactional Emails,” page 169.

Product Alerts		
Allow Alert When Product Price Changes	No	[STORE VIEW]
Price Alert Email Template	Product price alert (Default Template from Local...)	[STORE VIEW]
Allow Alert When Product Comes Back in Stock	No	[WEBSITE]
Stock Alert Email Template	Product stock alert (Default Template from Local...)	[STORE VIEW]
Alert Email Sender	General Contact	[STORE VIEW]

The price change alert creates a **Sign up for price alert** link in every product page. Clicking this link subscribes your customers to this alert for that particular product so that they receive an email each time the product price is changed. This includes adding or changing **Special Prices** in addition to the regular **Price** field.

The in-stock alert creates a link called **Sign up to get notified when this product is back in stock** in every **Out of Stock** product. Clicking this link subscribes your customer to this alert so that they receive an email when the product status changes to **In Stock**.

For each product, there is a tab listing all the customers subscribed to either of these alerts.

## Product Alerts Run Settings

These settings enable you to select how often Magento CE 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.

- ❖ **Frequency:** Choose how often product alerts are sent out: **Daily**, **Weekly**, or **Monthly**.
- ❖ **Start Time:** 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:** 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:** Select the role that the email will be “from.”
- ❖ **Error Email Template:** Select the email template to use for product alert error notifications. For more information, see “Customizing Transactional Emails,” page 169.

## Product Image Placeholders

This section enables you to specify an image for each of the sizes that are used instead of the product image, if it is missing.

## Recently Viewed/Compared Products

This feature is described in detail in “Recently Viewed,” page 47. The configuration section enables you to specify how many products are shown by default in each list.

The screenshot shows a configuration window titled "Recently Viewed/Compared Products". It contains three settings:

- Show for Current:** A dropdown menu set to "Website" with a "[WEBSITE]" label to its right.
- Default Recently Viewed Products Count:** A text input field containing the number "5" with a "[STORE VIEW]" label to its right.
- Default Recently Compared Products Count:** A text input field containing the number "5" with a "[STORE VIEW]" label to its right.

Figure 72. Recently Viewed/Compared Products Settings

## Price

The **Price** section contains only the **Catalog Price Scope** drop-down list, in which you can select the scope of the base currency (**Global** or **Website**).

## Layered Navigation

The **Layered Navigation** section enables you to choose whether the price ranges that are displayed in the layered navigation tool are calculated automatically or manually. If you select **Manual**, the **Default Price Navigation Step** field becomes visible, enabling you to specify the default size of the price ranges.

## Category Top Navigation

The **Category Top Navigation** section enables you to define how many levels of subcategories are displayed by clicking on a category in the top navigation bar on the frontend. Setting this value to 0 (zero) enables all levels to be displayed. If you have a large number of subcategory levels, this can potentially make it difficult for the user to navigate.

## Search Engine Optimizations

In order to make your site more search engine friendly, configure the following:

Search Engine Optimizations		
Autogenerated Site Map	Enable	[STORE VIEW]
Popular Search Terms	Enable	[STORE VIEW]
Product URL Suffix	.html	[STORE VIEW]
	▲ Cache refresh needed.	
Category URL Suffix	.html	[STORE VIEW]
	▲ Cache refresh needed.	
Use Categories Path for Product URLs	Yes	[STORE VIEW]
Create Permanent Redirect for old URLs if Url key changed	Yes	[STORE VIEW]
Page Title Separator	-	[STORE VIEW]
Use Canonical Link Meta Tag For Categories	No	[STORE VIEW]
Use Canonical Link Meta Tag For Products	No	[STORE VIEW]

Figure 73. Search Engine Optimization Settings

- ❖ **Auto generated Site Map:** Enable this feature to display a **Site Map** link in the footer of the frontend pages. This enables a customer to view an automatically generated site map including a list of all of your existing categories. In addition to the auto-generated site map, Magento CE enables integration with Google Sitemap. More information is provided on the following pages.

- ❖ **Popular Search Terms:** Enable this feature to display a **Search Terms** link in the footer of the frontend pages. This enables customers to link to a list of all search terms. This is an SEO feature because each of these search terms counts as a link to your site and is explored by search engines to discover content on your site.
- ❖ **Product URL Suffix and Category URL Suffix:** These options determine which suffix is displayed on each product and category page. Typically this value will be **.html** or **.htm**. When you change this value (and click **Save Config**), you must perform a cache refresh by selecting **System > Cache Management** and clicking **Flush Magento Cache**.
- ❖ **Use Categories Path for Product URLs:** This option determines how the URL is composed. Select **Yes** to specify that the URL links for products include the associated category and a separate link is generated for each associated category. Select **No** to specify that the URL rewrites include only the product name and that there is only one link for each product, regardless of how many categories the product is associated with.
- ❖ **Create Permanent Redirect for old URLs if URL key changed:** Selecting **Yes** automatically creates a redirect for the old URL that points to the new URL if a page is moved. Doing so eliminates the “404 Not Found” error message that customers see if a page they had bookmarked is moved.
- ❖ **Page Title Separator:** Specify a character to replace the space character ( ) with when the system uses the page title to construct the page’s URL. Typically you would use an underscore ( \_ ) or hyphen ( - ).
- ❖ **Use Canonical Link Meta Tag For Categories and Use Canonical Link Meta Tag For Products:** Select whether to add a tag to each category or product page that points to a “preferred” URL for search engines to index when encountering pages that contain the same content (but which may be sorted differently, for instance).

## Catalog Search

The options in this section define how the catalog search feature behaves.

- ❖ **Minimal Query Length:** Defines the minimum number of characters that the customer must specify in the **Search** field on the frontend.
- ❖ **Maximum Query Length:** Defines the maximum number of characters that the customer may specify in the **Search** field.
- ❖ **Maximum Query Words Count:** Define the maximum number of terms that can be specified in the **Search** field. This limit applies to the “Like” search type only.
- ❖ **Search Type:** Define the type of search that is performed:
  - **Like:** Includes only results that are close in spelling to the specified search terms.
  - **Fulltext:** Includes only results that exactly match the specified search terms.

- **Combine (Like and Fulltext):** Includes both exact matches and close matches.
- ❖ **Apply Layered Navigation if Search Results are Less Than:** Defines the maximum number of results for which layered navigation can be applied. If the number of results is more than this number, then the results are presented as a simple list. If you specify 0, then layered navigation is always applied. Limiting the number of results can increase performance.

## Downloadable Products Options

This section controls the settings for products of Downloadable type. The most important settings are:



Downloadable Product Options	
Order Item Status to Enable Downloads	Invoiced [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 [WEBSITE]
▲ Guest checkout will only work with shareable.	

Figure 74. Downloadable Products Options

- ❖ **Order Item Status to Enable Downloads:** Controls whether customers can access their downloadable product links immediately after the order is placed or only after the invoice is created for the order.
- ❖ **Default Maximum Number of Downloads:** Controls how many times a downloadable product may be downloaded by the customer after it has been purchased.
- ❖ **Shareable:** Setting this option to **Yes** enables non-registered customers (guest customers) to access their downloads. This is the only option for customers to access their products if you want to offer guest checkout or quick checkout methods, such as PayPal Express or Google Checkout. This setting can be overridden at the product level.
- ❖ **Default Sample Title and Default Link Title:** These settings control what is displayed throughout the store when referring to samples and downloadable products (links).
- ❖ **Open Links in New Window:** Controls whether the download page opens in a new window.
- ❖ **Use Content-Disposition:** Controls whether the content is opened in a browser window or downloaded.

- ❖ **Disable Guest Checkout if Cart Contains Downloadable Items:** This setting disables the Guest Checkout option only if there are downloadable items in a cart, and leaves it enabled if a customer is purchasing other products. If you set this option to **Yes**, be sure to set the **Shareable** option to **Yes** as well.

## Date and Time Custom Options

The options in this section control how dates and times are displayed in your store.

- ❖ **Use JavaScript Calendar:** Enables your store to present a JavaScript-powered calendar date picker in any field that requires the customer to select a date. When this option is set to **No**, then drop-down lists are provided to select the date and time.
- ❖ **Date Fields Order and Time Format:** Select the order in which the day, month, and year values are presented in the format xx/yy/zz., and select a 12-hour (a.m./p.m.) or 24-hour time format. These fields are important for store views that are targeted for specific countries that use date and time formats that are different from your local custom.
- ❖ **Year Range:** Indicate the range of years that is available for selection in either the JavaScript calendar or calendar drop-down lists. Use a four-digit year format.

## 6.3 Managing Categories

This section describes how to display, create, and edit categories and subcategories.

The products in the web store are grouped into categories. Categories enable you to give your store structure and form. In Magento CE, each store you create is assigned to a unique category. Any other category that you want to use in your store must be created as a subcategory. All categories are technically considered subcategories because you are placing them under the root category. See Figure 75.

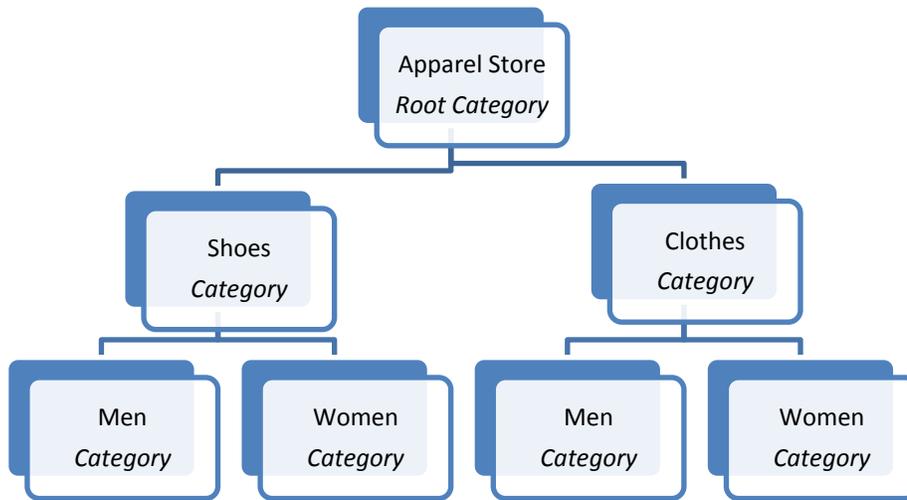


Figure 75. Example Category Structure

The way category names are displayed on the frontend depends on the layout. If the default theme is used for the web store, categories are shown in a bar near the top of the store web page.

Each product can be assigned to one or more categories, as described in “Finding the Right Products,” page 40.

## Displaying Categories

To display a list of all defined categories:

Select **Catalog > Manage Categories**. The categories are listed in a tree view on the left, as shown in Figure 76.

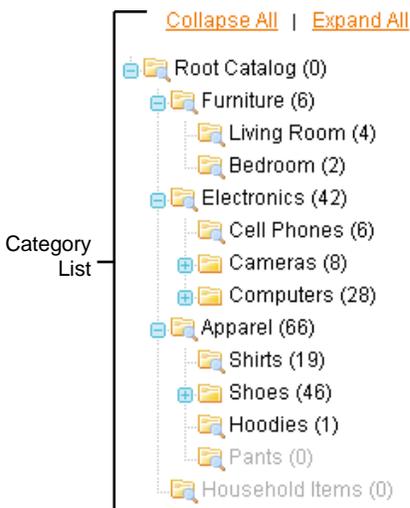


Figure 76. Category List

If you have loaded Sample Data, these sample categories (Furniture, Electronics and Apparel) will appear in the category tree. Disabled categories are listed in gray text.

## Creating Categories

This section describes the most important steps in creating a category.

### To create a new category:

- ❖ To create a new root category, make sure that **Choose Store View** in the upper-left corner of the page is set to **Default Config**, and click **Add Root Category**.
- ❖ To create a subcategory, select the parent category (it can be either a root category or a category) in the list and click **Add Subcategory**.

Four tabs of information are provided to describe this category: **General Information**, **Display Settings**, **Custom Design**, and **Category Products**. Click each tab and specify the requested information, as described below.

**Note:** Required fields appear with a red asterisk (\*).

### General Information Tab

Most of the fields in this page are self-explanatory. In this tab, you are asked to provide a category name, description, images (used to represent your category) as well as meta keywords and description for better search engine positioning.

The screenshot shows a 'General Information' form with the following fields and options:

- Name \***: Text input field with a '[STORE VIEW]' link.
- Is Active \***: Dropdown menu set to 'No' with a '[STORE VIEW]' link.
- URL key**: Text input field with a '[STORE VIEW]' link.
- Thumbnail Image**: Image selection area with a 'Browse...' button and a '[STORE VIEW]' link.
- Description**: Large text area with a '[STORE VIEW]' link. A 'WYSIWYG Editor' label is present below the field.
- Image**: Image selection area with a 'Browse...' button and a '[STORE VIEW]' link.
- Page Title**: Text input field with a '[STORE VIEW]' link.
- Meta Keywords**: Text area with a '[STORE VIEW]' link.
- Meta Description**: Text area with a '[STORE VIEW]' link.
- Include in Navigation Menu \***: Dropdown menu set to 'Yes' with a '[STORE VIEW]' link.

Figure 77. Create a New Category – General Information

1. Specify a name for this category in the **Name** field.
2. Set the **Is Active** field to **Yes** to specify that this category appears in the store.
3. In the **URL key** field you can specify a relative URL path which can be entered in place of the standard Target Path. It is “search engine friendly” because it can use the name of the category instead of the ID number. If you leave this field blank, Magento CE will automatically generate a URL with the name of the category upon creation of the category. If you enter a value here manually, you cannot use spaces in this field. The **URL key** field is not displayed for root categories.
4. For **Thumbnail Image**, use the **Browse** button to select and upload a thumbnail image to represent the category.
5. Specify a description in the **Description** text box. This description is presented on the frontend.

**Note:** You can use HTML tags in this text box. Alternatively, click the **WYSIWYG Editor** button to open a full-function HTML editor. The “What You See Is What You Get” (WYSIWYG) Editor includes a spelling checker, for which you need to download and install a plug-in for your browser.

6. The **Image** field is used for a category image. Click the **Browse** button next to the field to select the file. This image will appear in the frontend for each category’s page between the category name and the content.
7. In the **Page Title** field, specify the title of the page, which will be displayed on the browser tab header when the customer opens this category page.
8. In the **Meta Keywords** and **Meta Description** text boxes, specify the keywords and description for search engines to use for this category when indexing your site.
9. Select **Yes** for **Include in Navigation Menu** so that the category will appear in the navigation menu on the frontend.
10. Click **Save Category** to save your changes.

## Display Settings Tab

The **Display Settings** tab enables you to specify how this category is presented to the customer.

Display Settings		
Display Mode	Products only	[STORE VIEW]
CMS Block	Please select a static block ...	[STORE VIEW]
Is Anchor	No	[GLOBAL]
Available Product Listing Sort By *	Best Value Name Price	[STORE VIEW]
	<input checked="" type="checkbox"/> Use All Available Attributes	
Default Product Listing Sort By *	Best Value	[STORE VIEW]
	<input checked="" type="checkbox"/> Use Config Settings	
Layered Navigation Price Step		[STORE VIEW]
	<input checked="" type="checkbox"/> Use Config Settings	

Figure 78. Create a New Category – Display Settings

1. In the **Display Mode** field, select one of the following options to specify how you would like your category page to appear:
  - ❖ Static block only
  - ❖ Static block and product list below it
  - ❖ Product list only
2. In the **CMS Block** field, select the static block that you would like to be shown for this category (if selected in the **Display Mode** field). This block must first be created in the CMS section; for more information, see “Managing CMS Pages,” page 166.

- ❖ In the **Is Anchor** field, select **Yes** to specify that this category page is an anchor. Anchors are used for the layered navigation in Magento CE, as described in “Layered Navigation,” page 86.
  - If you set the category to be an anchor for Layered Navigation, then your web store displays the subcategories of this category in the **SHOP BY** panel on the left. This area also shows a linked list of the filterable attributes of the products in this category and its subcategories.
  - Figure 79 shows the **SHOP BY** panel for the Apparel category, which is set as an anchor.



Figure 79. Anchored Category

3. For **Available Product Listing Sort By**, specify the attributes by which the customer can sort the list of products in this category. By default, all available attributes can be used for sorting; clear the **Use All Available Attributes** check box to modify the list.
4. For **Default Product Listing Sort By**, select the attribute by which the product list is sorted by default. This is set in the catalog configuration (see “Setting Up Catalog Defaults,” page 72), but you can clear the **Use Config Settings** check box to select a default sorting attribute for this particular category.
5. For **Layered Navigation Price Step**, specify the size of the price range to be used when calculating the price “buckets” for the Layered Navigation. This is set in the catalog configuration, but you can clear the **Use Config Settings** check box to specify a price range size for this particular category.

## Custom Design Tab

The **Custom Design** tab contains additional settings to control the theme and layout updates that are used for this category page. Depending on the settings they can also affect child pages as well. All of these settings are optional. For more information about custom designs and page layouts, see “Design and Content,” page 161.

1. For **Use Parent Category Settings**, choose **Yes** to “inherit” the settings of this subcategory from its parent category. Doing so ensures a consistent look within a category family, and disables all other settings on this page. This setting is not available for root categories.
2. For **Apply to Products**, select **Yes** to apply the category page settings to the product pages of the products in this category.

3. Select a custom design from the **Custom Design** drop-down list. Magento CE comes with several custom designs already defined, and you can modify these custom designs or create your own. For more information, see “Managing CMS Pages,” page 166.
4. For the **Active From** and **Active To** fields, select the start and end dates for this custom design to be applied to this category. If you do not select a start date, the custom design is applied immediately. If you do not select an end date, the custom design is applied to this category until you manually deactivate it.
5. For **Page Layout**, select a layout from the drop-down list.
  - ❖ **No layout updates:** Uses the default settings that come with the Magento CE installation
  - ❖ **Empty:** Displays the category page without any objects, except for the content (products or static blocks only), category name, and view options (number to display per page, view as grid or list, and sort by options)
  - ❖ **1 column:** Displays the contents, category name and view options, as well as the header, footer, search field, and navigation bar
  - ❖ **Column on the left:** Adds the left column to the 1 column display, which by default includes the currency selection and layered navigation
  - ❖ **Column on the right:** Adds the right column to the 1 column display, which by default includes the shopping cart view, wishlist, compared products list, polls, and newsletter sign-up
  - ❖ **3 columns:** Displays both the left and the right columns
6. The **Custom Layout Update** is essentially a static block, with a few differences. Rather than HTML, the structure must be in XML format. The Update will appear at the bottom of the page, below the products, whereas a static block will appear above the products (if the static block is set to display with products). The custom layout update will appear on the page only during the dates specified in the **Active From** and **Active To** date range.
7. Click **Save Category** to save your changes.

## Catalog Products Tab

This tab enables you to specify the products that belong to this category.

**Note:** You can also assign a product to a category when editing a product's record. For more information, see “Managing Products,” page 97.

Page 1 of 1 pages | View 20 per page | Total 6 records found [Reset Filter](#) [Search](#)

<input type="checkbox"/>	ID	Name	SKU	Price	Position
Any				From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>
<input type="checkbox"/>	6	Cat picture	123954991	\$1.00	<input type="text"/>
<input type="checkbox"/>	5	Configurable product	ssdfsdf	\$1.00	<input type="text"/>
<input type="checkbox"/>	4	Product 4	32asdf	\$165.00	<input type="text"/>
<input type="checkbox"/>	3	Product 3	333	\$150.00	<input type="text"/>
<input type="checkbox"/>	2	Product 2	22asd	\$120.00	<input type="text"/>
<input type="checkbox"/>	1	Product 1	1111	\$100.00	<input type="text"/>

Figure 80. Creating a New Category – Products

1. If needed, use the filter fields at the top of the table to filter the list of products. Click **Reset Filter** to clear all filter settings.
2. Select the check box in the left column for each product that belongs in this category. Remember that a product can be assigned to more than one category.
3. In the **Position** column, specify a whole number that indicates the order in which the product is listed when the products are sorted by **Best Value**. The product with a **Position** value of 1 is listed first, 2 is listed second, and so on. If more than one product has the same value for **Position**, the product with the lowest (that is, closest to 1) ID number is listed first.
4. Click **Save Category** to save your changes. You may need to refresh the page to display the category in the tree.

## Editing Categories

### To edit a Category:

Click on a category in the tree, edit its information and click **Save Category**.

## Layered Navigation

### What is Layered Navigation?

Of course, you want the customers browsing through your site to find the products that interest them in the fastest possible way. Otherwise, your sales opportunities are lost. When a customer is confronted with a category containing 60 products spread across multiple pages, most customers simply leave the site when they cannot find what they need on the first page. Magento CE enables you to provide customers with the option to find the products that they want by making a selection from a variety of filters, such as price, manufacturer, or any other aspect of the products, as shown in Figure 81. Layered navigation information is shown on category listing pages while searching for products. Show your customers what they want and you will raise conversions!

The example in Figure 81 shows an enabled layered navigation filter by PRICE range and COLOR.

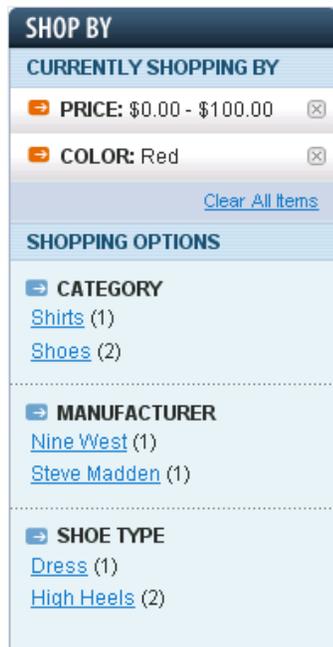


Figure 81. Layered Navigation

## Default Layered Navigation

In Magento CE, two properties appear as navigation filters by default: **PRICE** and **CATEGORY**.

- **PRICE:** Price ranges are selected logically in order to provide another filter for navigation. The ranges themselves are determined by the prices of products contained within them. There are never more than ten price ranges displayed at a time and products are distributed accordingly.
- **CATEGORY:** If you define a category as an **Anchor Category** (see “Display Settings Tab,” page 83), its subcategories are displayed as layered navigation options. Figure 81 shows that the first filter is **CATEGORY** and it features two options: Shirts and Shoes. In this example, Shirts and Shoes are subcategories of the category that is represented by this layered navigation block.

## Defining Layered Navigation Filters

The additional filters in Figure 81 are **Manufacturer** and **Shoe Type**. These are product attributes that have been selected as filterable. This is defined in the **Use in Layered Navigation** field under **Catalog > Attributes**, as described on page 91.

There are two types of filterable attributes:

- **Filterable (with results):** Links appear only for values where the number of results (the number in parentheses next to each value) is greater than zero.
- **Filterable (no results):** Links appear for all values, regardless of the number of results.

In order for an attribute to appear as a layered navigation filter, the **Catalog Input Type for Storeowner** must be **Dropdown**, **Multiple Select** or **Price**. This controls the number of possible filter options and makes them consistent.

## Price Layered Navigation

The Price Layered Navigation algorithm enables you to create price ranges so that products are evenly distributed among ranges. You can also split each range iteratively.

The enhanced configuration controls for the Price Layered Navigation feature were introduced in Magento CE version 1.7 and Magento EE version 1.12.

## Configuring the Price Layered Navigation Algorithm

The algorithm for calculating the price layered navigation is configured in the Magento Admin Panel under **System > CATALOG > Catalog > Layered Navigation**.

To set and configure the new price layered navigation algorithm:

1. Log in to the Magento Admin Panel.
2. Navigate to **System > Configuration > CATALOG > Catalog**.
3. In the **Current Configuration Scope** in the upper-left corner of the page select the desired store view.
4. Expand the **Layered Navigation** field set. In the **Display Product Count** field, decide whether the number of products which fall into a price range will be displayed.
5. In the **Price Navigation Step Calculation** field select **Automatic (equalize product counts)**. Additional options appear.

**Note:** The **Automatic (equalize price ranges)** option of the **Price Navigation Step Calculation** field is similar to the **Automatic** option which was available in the previous versions of Magento. If you select the **Automatic (equalize price ranges)** option, the previously existing price layered navigation algorithm will be used.

6. In the **Display Price Interval as One Price** field, decide what will be the system behavior if all products which fall into a certain price range have the same price. Select **Yes** if you want to display a single price (not the range finite values).
7. In the **Interval Division Limit** field, specify the threshold for a number of products within a price range after which the range cannot be further split. The default value is 9.
8. To save the changes click **Save Config**.

## Price Layered Navigation Algorithm: Store Customer Experience

The price layered navigation algorithm provides the optimal distribution of products among price ranges. In addition, the feature provides iterative splitting of price ranges.

Previously, if a customer selected to view products from a certain price range, there was no further subdivision to smaller price ranges on the resulting catalog page. For example, if a store customer clicked the **\$0.00-\$99** range, the price filter on the page with a list of products contained the selected range only. See Figure 82.

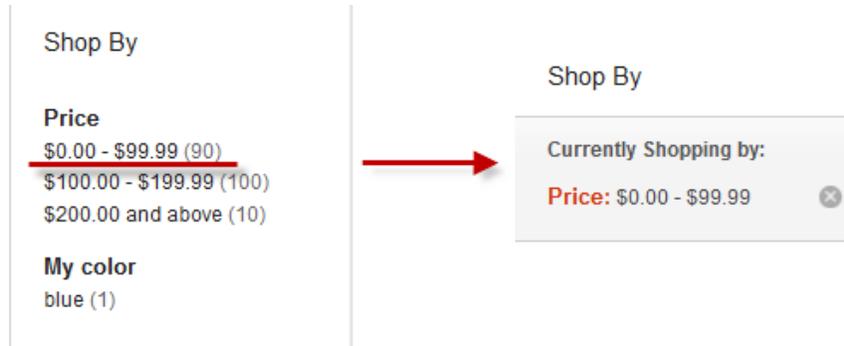


Figure 82. Store customer experience with price layered navigation in Magento Enterprise 1.11 and earlier

With the iterative splitting feature, after a customer chooses to view the **\$0.00-\$99** range, the price filter on the page with a list of products can contain several sub-ranges. See Figure 83.

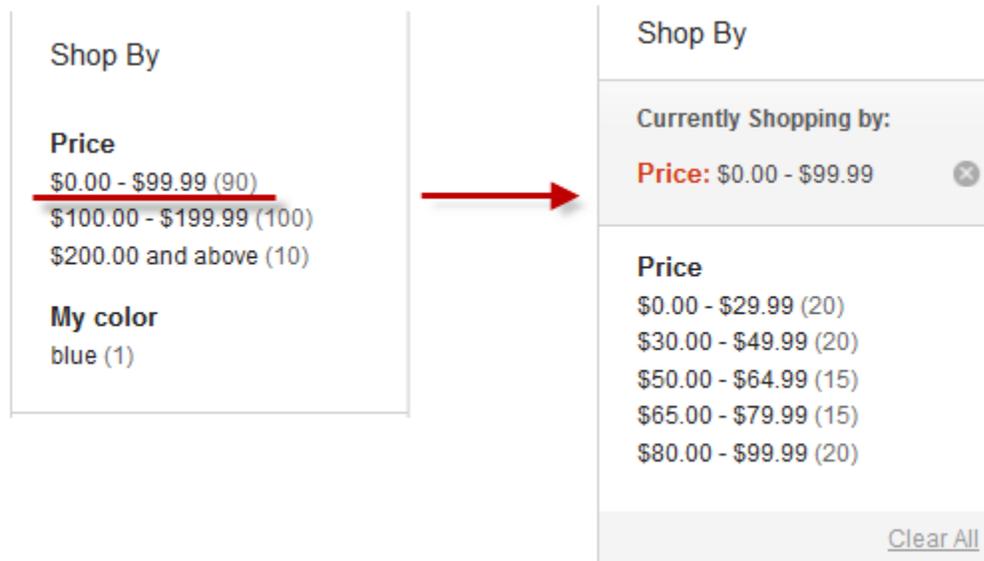


Figure 83. Store customer experience with price layered navigation in Magento Enterprise 1.12

**Note:** A price range is not further splitted after the number of products which fall into this range reaches the threshold set in the **Interval Division Limit** field under **System > Configuration > CATALOG > Catalog > Layered Navigation**.

## 6.4 Managing Product Attributes

### What is an Attribute in Magento?

An attribute represents a property of a product, such as: its name, image, SKU, color, manufacturer, and so on. Attributes enable you to add new product properties without having to write a single line of code or to add any columns to your database.

Understanding attributes is crucial for making your store easy to use for customers.

You assign attributes to your products in order to enable your customers and search engines to find them more easily. Your Magento CE web store automatically displays products according to their attributes, for easy accessibility by your customers, in the **SHOP BY** layered navigation panel on the left of your web store, as shown in Figure 84.

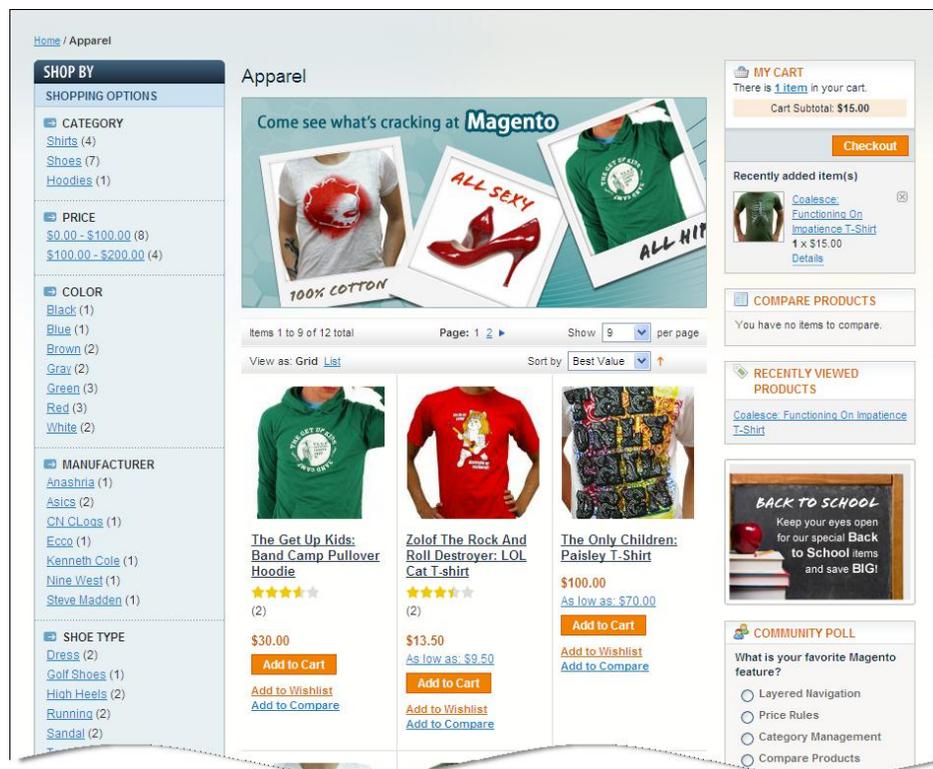


Figure 84. Category Page with Layered Navigation

Attributes also determine which products are displayed when a customer performs a search for a keyword.

**System attributes** define the properties that are required by the store to function properly. These attributes cannot be deleted.

You can add as many additional attributes as desired. In the Magento CE backend you can define attributes in sets. Attribute sets ease the definition process so that similar products can be created with the same attributes. Attribute sets enable you to assign multiple attributes to a product at one time by assigning an entire attribute set to a product.

If a store sells televisions, shoes, books, and power tools, then four attribute sets could be defined: one specific to televisions, one for shoes, and so on. When a new power tool product is added to your catalog, you can simply select the “Power Tool” attribute set to add the relevant attributes to this product.

You should first define attributes, then define attribute sets and assign the relevant attributes to the attribute sets, as described in this section.

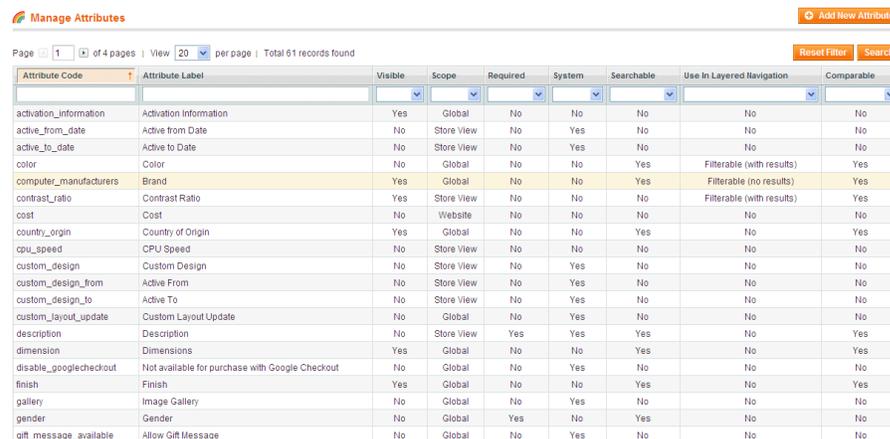
## Creating Attributes

Attributes must be defined before defining attribute sets and products.

**Note:** Only attribute sets can be assigned to a product, not individual attributes.

To define attributes:

1. Select **Catalog > Attributes > Manage Attributes**. A list of existing attributes is displayed, as shown in Figure 85.



Attribute Code	Attribute Label	Visible	Scope	Required	System	Searchable	Use In Layered Navigation	Comparable
activation_information	Activation Information	Yes	Global	No	No	No	No	No
active_from_date	Active From Date	No	Store View	No	Yes	No	No	No
active_to_date	Active To Date	No	Store View	No	Yes	No	No	No
color	Color	No	Global	No	No	Yes	Filterable (with results)	Yes
computer_manufacturers	Brand	Yes	Global	No	No	Yes	Filterable (no results)	Yes
contrast_ratio	Contrast Ratio	Yes	Store View	No	No	No	Filterable (with results)	Yes
cost	Cost	No	Website	No	No	No	No	No
country_origin	Country of Origin	Yes	Global	No	No	Yes	No	Yes
cpu_speed	CPU Speed	No	Store View	No	No	No	No	No
custom_design	Custom Design	No	Store View	No	Yes	No	No	No
custom_design_from	Active From	No	Store View	No	Yes	No	No	No
custom_design_to	Active To	No	Store View	No	Yes	No	No	No
custom_layout_update	Custom Layout Update	No	Global	No	Yes	No	No	No
description	Description	No	Store View	Yes	Yes	Yes	No	Yes
dimension	Dimensions	Yes	Global	No	No	Yes	No	Yes
disable_googlecheckout	Not available for purchase with Google Checkout	No	Global	No	Yes	No	No	No
finish	Finish	Yes	Global	No	No	Yes	No	Yes
gallery	Image Gallery	No	Global	No	Yes	No	No	No
gender	Gender	No	Global	Yes	No	Yes	No	No
gift_message_available	Allow Gift Message	No	Global	No	Yes	No	No	No

Figure 85. Manage Attributes Page

2. Click **Add New Attribute** to display the New Product Attribute page (Figure 86) in which you can define a new attribute.

Attribute Properties	
Attribute Code *	<input type="text"/> <small>▲ For internal use. Must be unique with no spaces</small>
Scope	Store View <small>▲ Declare attribute value saving scope</small>
Catalog Input Type for Store Owner	Text Field
Default Value	<input type="text"/>
Unique Value	No <small>▲ Not shared with other products</small>
Values Required	No
Input Validation for Store Owner	None
Apply To *	All Product Types

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

Figure 86. New Product Attribute Page

3. In the **Attribute Code** field, specify a unique identifier for this attribute. Do not use spaces. The code does not appear on the frontend.
4. In the **Scope** field select the scope to which this attribute applies.
5. The **Catalog Input Type for Store Owner** setting controls how a store administrator specifies values for attributes. For descriptive textual attributes, you can use the **Text Field** or **Text Area** types; for list prices you use the **Price** type. Note that not all types can be used for layered navigation.
6. If this attribute has a default value, specify it in the **Default Value** field.
7. If the value of the attribute must be unique for each product (for example, a SKU number), select **Yes** for **Unique Value**.
8. If the value of the attribute cannot be blank for any product, select **Yes** for **Values Required**.

9. In the **Input Validation for Store Owner** field, select the type of validation that should be enforced on values of this attribute. For example, if the values of this attribute will be email addresses, select **Email** to cause the system to check each entered value of this attribute against the rules for valid email addresses.
10. If this attribute will apply only to certain Magento CE product types, select **Selected Product Types** for **Apply To**. In the list that appears, select one or more product types for this attribute (use Ctrl+click to select multiple items).
11. For **Use in Quick Search** and **Use in Advanced Search**, select **Yes** to enable the quick search and advanced search tools to search this attribute's values.
12. For **Comparable on Front-end**, select **Yes** to have this attribute appear in the compare window when products are compared.
13. The **Use in Layered Navigation** field defines whether the attribute is used in layered navigation. The following options are available:
  - ❖ **Filterable (with results)**: Only those attribute values that correspond to the existing products in your frontend catalog will be used in the layered navigation.
  - ❖ **Filterable (no results)**: All values of the attribute that you have created on the **Manage Label / Options** tab will be listed.
  - ❖ **No**: Not used in layered navigation.

Note that only attributes with the **Dropdown**, **Multiple Select**, or **Price** input type can be used in layered navigation.

14. The **Use for Promo Rule Conditions**, field defines whether the attribute can be used in defining conditions for catalog and shopping cart price rules.
15. The **Position** parameter determines the position of the attribute in the layered navigation block with respect to other filterable attributes.
16. In the **Visible on Product View Pages on Frontend** field, select **Yes** to specify that this attribute appears in the **Additional Information** part of a product's page in the web store, as shown in Figure 87.

Additional Information	
Model	LX.FR206.001
Brand	Acer
In Depth	<ul style="list-style-type: none"> <li>• Mobile AMD Athlon 64 2800+</li> <li>• 1MB L2 Cache</li> <li>• 512MB of PC2700 DDR333 SDRAM</li> <li>• 2 RAM Slots (0 open - upgrading requires chip removal)</li> <li>• RAM is upgradeable to 2GB</li> </ul>
Screensize	15-inch, 200-nit, high-brightness TFT LCD screen
Harddrive	80 gig Western Digital
Processor	Mobile AMD Athlon 64 2800+
Memory	512MB of PC2700 DDR333 SDRAM

Figure 87. Attributes on the Additional Information Panel

17. For **Allow HTML Tags on Frontend**, select **Yes** to enable HTML tags that are specified in this attribute's values to be honored on the frontend.
18. For **Used in Product Listing**, select **Yes** to list values of this attribute in the product listing.

19. For **Used for Sorting in Product Listing**, select **Yes** to enable the product list to be sorted by values of this attribute.
20. Click **Manage Label/Options** at the top left of the page to display the Manage Label/Options page, as shown in Figure 88.



Figure 88. Manage Label/Options Page

21. In the **Manage Titles** box, specify a display name for this attribute for each store view. If you specify a value only in the **Admin** field, that value will be used in all cases.
22. For attributes with an input type of **Dropdown** or **Multiple Select**, you can enter values that can be specified for the attribute. To add a value, click the **Add Options** button. You can specify a different label for the value for each store view and set the default value by selecting the **Is Default** option button. For the **Dropdown** input type, you can select the **Is Default** option button only for one attribute value. For the **Multiple Select** input type, you can select multiple values by selecting the **Is Default** check box next to the desired attribute values.

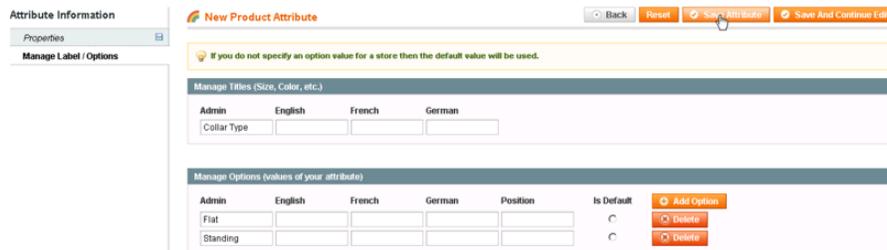


Figure 89. Attribute Value Specifications

23. Click **Save Attribute**.

## 6.5 Creating Attribute Sets

An attribute set is a collection of attributes, customized to fit certain types of products. All attribute sets must contain all of Magento’s system attributes, but you can customize them to include different combinations of simple attributes. Only attribute sets (not individual attributes) can be assigned to a product. If you want to add a small number of attributes, you can add them to the Default set, but if you want to add attributes that will be applied only to a subset of products, it is advisable to create an attribute set for each set of attributes that you want to assign to products. An attribute set can inherit attributes from another attribute set. This feature saves you from redefining sets of attributes that apply to many different products.

## To create a new attribute set:

1. In the Admin Panel, select **Catalog > Attributes > Manage Attribute Sets**. A list of existing attribute sets is displayed, as shown in Figure 90.

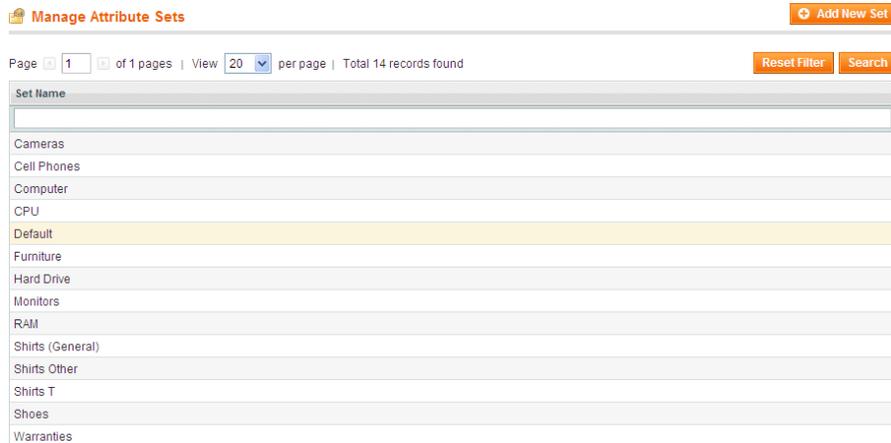


Figure 90. Manage Attribute Sets Page

**Note:** Figure 90 shows the attribute sets that are provided in Magento's Sample Data.

**Note:** The Default attribute set is composed mostly of system attributes. This attribute set is typically inherited by all other attribute sets.

2. Click the **Add New Set** button to display the Add New Attribute Set page (Figure 91).



Figure 91. Add New Attribute Set Page

3. In the **Name** field, specify the name of this attribute set. This name is used only in the backend.
4. In the **Based On** field, select another attribute set from which this attribute set is to inherit. This enables you to reuse the attributes that are already defined in a set to build other attribute sets. The simple option is to leave the **Default** option that appears in this field.

Click **Save Attribute Set** to display the Edit Attribute Set page (Figure 92).

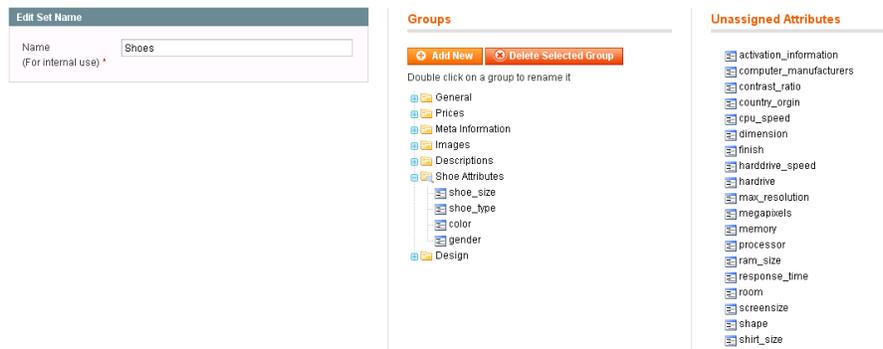


Figure 92. Edit Attribute Set

**Note:** System attributes are indicated by an icon with an orange dot.

The top left of the page shows the name of the attribute set that you are defining. The center of the page shows a hierarchical tree representing groups of attributes. An attribute group is a logical grouping of attributes within an attribute set. See “Creating a New Attribute Group,” page 96, for a description of how to define attribute groups.

The right side of the page shows a list of attributes defined in other attribute sets and not assigned to this attribute set.

5. Assign attributes to this attribute set by dragging them from the **Unassigned Attributes** area on the right into a group in the tree in the **Groups** area.

## Creating a New Attribute Group

The center of the Edit Attribute Set page shows a hierarchical tree representing groups of attributes.

Attribute groups can be thought of as folders that contain attributes. Each group corresponds to a different tab on the product page in the backend. Magento CE comes with six attribute groups by default: General, Prices, Meta Information, Images, Recurring Profiles, Design, and Gift Options. They contain the various system attributes. System attributes cannot be removed from an attribute set; however, they can be moved to other attribute groups. Therefore, you can remove an attribute group as long as there are no system attributes within it. The order of both the attribute groups and the attributes can be changed by selecting and dragging them. This affects the order of tabs and attributes on the product page in the backend, respectively. You can also create a new attribute group, to which you can move system attributes, or associate simple attributes.

## Groups

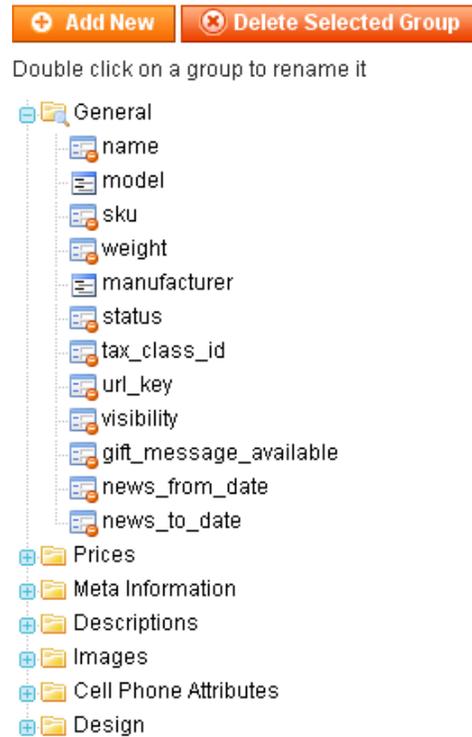


Figure 93. **Attribute Groups**

### To create a new attribute group:

1. Click **Add New** in the **Groups** area to display a popup window asking for the group name.
2. Specify the name of the new group and click **OK**.
3. Click and drag attributes from the **Unassigned Attributes** area into the newly created group to assign them to this group.
4. You can also click and drag attributes that are already assigned to move them between groups.

## 6.6 Managing Products

This section describes how to define and edit products.

**Tip:** You should first define attributes and an attribute set, as described in “Managing Product Attributes,” page 90, before you define products that have those attributes.

## Product Types

Magento CE offers a variety of product types that enable significant flexibility when defining products. The following lists the available product types and their typical usage:

- ❖ **Simple Product:** This is the most basic product type. It is suitable for all kinds of physical (shipped) products.
- ❖ **Grouped:** This option enables you to display several similar products on a single page. For example, if you are selling chefs' knives and you have the same knife in four sizes, you can make a grouped product to display all four of these sizes. Customers can select the size(s) that they want and the quantity they need, and add them to the cart from this page.
- ❖ **Configurable:** This product type enables your customers to select the variant that they want by choosing options. For example, you can sell T-shirts in two colors and three sizes. You would have to create six variants as individual products (each with its own SKU) and then add these six to a configurable product where customers can choose the size and color, and then add it to their cart. A very similar functionality is possible by using Custom Options for Simple products. The difference between a configurable product and a product including custom options is that inventory is not checked or updated for individual options during the purchase of the latter and there is no possibility to go directly to a product with a given set of options. This also makes it hard for a search engine to find the product option.
- ❖ **Virtual Product:** This is a product that does not require shipping or inventory. It is generally used for warranties or services.
- ❖ **Downloadable Product:** This is a digitally downloadable product that sells one or more files of a product and provides samples of those files. These downloadable files can reside on your server or be provided as URLs to any other server.
- ❖ **Bundle:** This product is composed of components that are presented in different ways and are made from existing products. A good example of a bundle is a complete computer. For this computer, you can configure how much RAM or what kind of monitor is included with this computer in your store.

## Creating a New Product

The following steps are the same for all product types. Subsequent sections describe the differences between each of the product types.

### To create a new product:

1. In the Admin Panel, select **Catalog > Manage Products** to display the Manage Products page, as shown in Figure 94.

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Websites	Action
166	HTC Touch Diamond	Simple Product	Cell Phones	HTC Touch Diamond	\$ 750.00	999997	Catalog, Search	Enabled	Main Website	Edit
165	My Computer	Bundle Product	Computer	mycomputer		999998	Catalog, Search	Enabled	Main Website	Edit
164	Gaming Computer	Bundle Product	Default	computer_fixed	\$ 4,999.95	999995	Catalog, Search	Enabled	Main Website	Edit
163	Computer	Bundle Product	Default	computer		999995	Catalog, Search	Enabled	Main Website	Edit
162	Microsoft Wireless Optical Mouse 5000	Simple Product	Default	micronmouse5000	\$ 59.99	999999	Catalog, Search	Enabled	Main Website	Edit
161	Logitech diNovo Edge Keyboard	Simple Product	Default	logidinovo	\$ 239.99	999995	Catalog, Search	Enabled	Main Website	Edit
160	Logitech Cordless Optical Trackman	Simple Product	Default	logitechcord	\$ 79.99	999995	Catalog, Search	Enabled	Main Website	Edit
159	Microsoft Natural Ergonomic Keyboard 4000	Simple Product	Default	microsoftnatural	\$ 99.99	999998	Catalog, Search	Enabled	Main Website	Edit
158	Sony VAIO 11.1" Notebook PC	Bundle Product	Computer	VON-T0N27NBW		999998	Catalog, Search	Enabled	Main Website	Edit
157	30" Flat-Panel TFT-LCD Cinema HD Monitor	Simple Product	Monitors	M9179LL	\$ 699.99	999997	Catalog, Search	Enabled	Main Website	Edit
156	19" Widescreen Flat-Panel LCD Monitor	Simple Product	Monitors	W1952TQ-TF	\$ 399.99	999998	Catalog, Search	Enabled	Main Website	Edit

Figure 94. Manage Products Page

**Note:** Figure 94 shows the products defined in the Sample Data provided with Magento. If you downloaded Sample Data, as described in the **Step 2: Downloading Sample Data** section on page 11, then you may want to leave the products in for you to refer to as examples and delete them later.

2. Click **Add Product** on the top right of the page to display the New Product page (Figure 95).

Figure 95. New Product Page

## Product Wizard, First Page

The New Product page is the first page of a product definition wizard that walks you through the process of defining a product.

1. In the **Attribute Set** field, select the attribute set that contains the attributes that best describe this product. See “Managing Product Attributes,” page 90, for a description of how to define attributes.
2. In the **Product Type** field, choose the type of product you want to create.
3. Click **Continue** to display the **General** tab, as shown in Figure 96. (This tab may look different depending on the product type that you choose.)

The screenshot shows the 'New Product (Default)' form in the 'General' tab. The form is titled 'New Product (Default)' and has buttons for 'Back', 'Reset', 'Save', and 'Save and Continue Edit'. A sidebar on the left lists various tabs: General, Prices, Meta Information, Images, Description, Design, Recurring Profile, Gift Options, Inventory, Websites, Categories, Related Products, Up-sells, Cross-sells, and Custom Options. The 'General' tab is active, showing the following fields:

- Name \* (STORE VIEW)
- SKU \* (GLOBAL)
- Weight \* (GLOBAL)
- Status \* (WEBSITE) - dropdown menu with "-- Please Select --"
- Tax Class \* (STORE VIEW) - dropdown menu with "-- Please Select --"
- URL key (GLOBAL)
- Visibility \* (STORE VIEW) - dropdown menu with "Catalog, Search"
- Manufacturer (GLOBAL) - dropdown menu
- Color (GLOBAL) - dropdown menu
- Set Product as New from Date (GLOBAL) - date picker
- Set Product as New to Date (GLOBAL) - date picker
- Country of Manufacture (WEBSITE) - dropdown menu
- In feed (GLOBAL) - dropdown menu with "No"

Figure 96. General Tab

## General Tab

Fill in all the mandatory fields, which are indicated by a red asterisk (\*).

- ❖ **Name:** The product name as it appears in the frontend.
- ❖ **SKU:** The product's store keeping unit (SKU). Magento CE uses SKU as a unique identifier for this product. SKU is global, meaning if you update the SKU for a product in one web store, it updates in all other web stores as well.
- ❖ **Weight:** The product's weight. This value is usually used for shipping calculations. Specify only the number. Shipping service providers will interpret it according to the measurement units they use.
- ❖ **Status:** Select **Enabled** to make this product available on the frontend.
- ❖ **Tax Class:** The tax class of the product. See "Product Tax Class," page 133, for more information.
- ❖ **Visibility:** Determines whether the product is displayed in the catalog pages and/or search results. The following options are available:
  - **Not Visible Individually** - The product will not be displayed individually in the frontend; however, it can be a component of a composite, configurable, bundle, or grouped product.
  - **Catalog** - The product will displayed on pages of categories it is associated to, but it will not appear in search results.
  - **Search** - The product will be displayed when your customers search for it either using the quick or Advanced Search tools, but will not be displayed on the related category page.
  - **Catalog, Search** - The product will be available on category view pages to which it is associated and on the search result page.

The following describes the other fields in this page:

- ❖ **URL key:** The search engine-friendly URL identifier is the name used for this product in the product’s URL. You cannot use spaces in this field. If the URL key is left blank, one is automatically generated by Magento CE.
- ❖ **Manufacturer:** Select the name of the manufacturer from the drop-down list.
- ❖ **Color:** Select the color of the product, if applicable.
- ❖ **Set Product as New from/to Date:** The date range in which this product can be promoted as a new product in various locations throughout your site.
- ❖ **Country of Manufacture:** Select the country in which the product was manufactured.
- ❖ **In feed:** Determines whether this product is included in your store’s product RSS feed.

**Note:** Additional fields may appear on this (and other pages) if you add attributes to the Default attribute set or base the product on another attribute set.

**Note:** The **Create New Attribute** button opens a popup window that enables you to enter an attribute to be added to the selected attribute set. However, we recommend defining the attributes structure first.

## Prices Tab

Click the **Prices** tab in the **Product Information** panel on the left to display the **Prices** tab, as shown in Figure 97.

The screenshot shows the 'Prices' tab interface. At the top right, there is a button labeled 'Create New Attribute'. The form contains the following fields and controls:

- Price \***: Input field with a '[WEBSITE]' label and a '[USD]' unit indicator below it.
- Cost**: Input field with a '[WEBSITE]' label and a '[USD]' unit indicator below it.
- Tier Price**: A table with columns: Website, Customer Group, Qty, Price, and Action. An 'Add Tier' button is located at the bottom right of the table.
- Special Price**: Input field with a '[WEBSITE]' label and a '[USD]' unit indicator below it.
- Special Price From Date**: Input field with a calendar icon and a '[GLOBAL]' label.
- Special Price To Date**: Input field with a calendar icon and a '[GLOBAL]' label.
- Is product available for purchase with Google Checkout**: A dropdown menu currently set to 'Yes' with a '[GLOBAL]' label.
- Apply MAP**: A dropdown menu currently set to 'Use config' with a '[WEBSITE]' label.
- Display Actual Price**: A dropdown menu currently set to 'Use config' with a '[WEBSITE]' label.
- Manufacturer's Suggested Retail Price**: Input field with a '[WEBSITE]' label and a '[USD]' unit indicator below it.

Figure 97. **Prices Tab**

Fill in all the mandatory fields, which are indicated by a red asterisk (\*).

This tab enables you to enter the **Price**, **Cost** and **Special Price** information for this product. You can also add Tier Pricing, as described in “Tier Pricing,” page 200.

- ❖ The **Special Price** field is used for discounting or promotions, as described in “Special Prices,” page 199.
- ❖ The **Cost** field is only used in the backend. It can be used for generating margin and profit reports.
- ❖ The **Apply Map**, **Display Actual Price**, and **Manufacturer’s Suggested Retail Price** fields are used for implementing the Minimum Advertised Price feature for this product. For more information, see “Minimum Advertised Price,” page 202.

## Meta Information Tab

Click **Meta Info** on the left to display the **Meta Information** tab, as shown in Figure 98.

Meta Information + Create New Attribute

Meta Title [STORE VIEW]

Meta Keywords [STORE VIEW]

Meta Description [STORE VIEW]

▲ Maximum 255 chars

Figure 98. Meta Information Tab

4. Specify information that enables search engines to more easily find and index this product.

## Images Tab

Customers generally like to see what they are buying before they make a purchase. The **Images** tab enables you to upload pictures of your product.

1. Click the **Images** tab on the left to display the **Images** tab, as shown in Figure 99.

Images

Image type and information need to be specified for each store view.

Image	Label	Sort Order	Thumbnail [STORE VIEW]	Small Image [STORE VIEW]	Base Image [STORE VIEW]	Exclude	Remove
No image							

Browse Files... Upload Files

Figure 99. Images Tab

- Specify the image to be displayed in the web store to represent this product. Use the **Browse** button to select the image file from your local file system.

**Tip:** You can select more than one file in this window to upload multiple images at once.

- After you have specified the image files of this product, click the **Upload Files** button. The **Images** tab shows uploaded the image files, as shown in Figure 100.

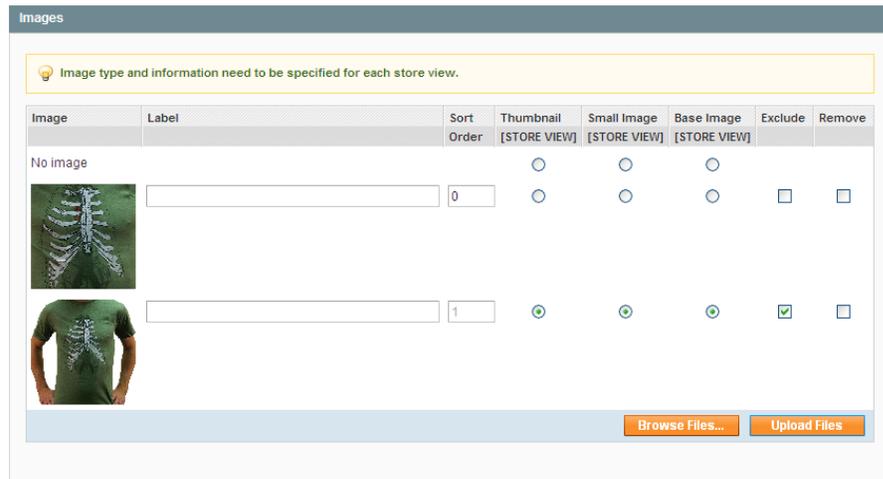


Figure 100. **Images Tab with Images Uploaded**

- Select the appropriate options for each of the images, as follows:
  - ❖ **Label:** Alternate text for the image tag
  - ❖ **Sort Order:** The order in which the images are displayed in the Slideshow and MORE VIEWS gallery
  - ❖ **Thumbnail:** Used in shopping cart and related items
  - ❖ **Small Image:** Used in the Category listing, wishlist and so on
  - ❖ **Base Image:** Large product image (zoomed in)
  - ❖ **Exclude:** Excludes the image from the Slideshow and MORE VIEWS gallery
  - ❖ **Remove:** Deletes the image from the collection; if the **Remove** check box is selected, the image will be removed after you save the product

## Description Tab

Click **Description** on the left to open the **Description** tab, which enables you to create descriptions for the product (see Figure 101).

The image shows a user interface for editing product descriptions. At the top, there is a dark header bar with the word "Description" on the left and a button labeled "Create New Attribute" on the right. Below this, the main content area is divided into two sections. The first section is labeled "Description \*" and contains a large empty text box. To the right of this box is a "[STORE VIEW]" link. Below the text box is a button labeled "WYSIWYG Editor". The second section is labeled "Short Description \*" and contains a smaller empty text box. To the right of this box is another "[STORE VIEW]" link. Below this text box is another button labeled "WYSIWYG Editor".

Figure 101. **Description Tab**

Both of the fields on this tab are mandatory. For both fields, you can use the WYSIWIG editor to format your descriptions.

- ❖ **Description:** The information that you enter in the **Description** field is shown in the product's page under the title **Product Description**.
- ❖ **Short Description:** The information that you enter in the **Short Description** field appears on the product's page under the title **Quick Overview**. This information is also shown when products are displayed in a list.

## Design Tab

The **Design** tab contains additional settings to control the appearance of this product's product page, as shown in Figure 102.

Figure 102. Design Tab

All of these settings are optional. For more information about custom designs and page layouts, see “Design and Content,” page 161.

1. Select a custom design from the **Custom Design** drop-down list. Magento CE comes with several custom designs already defined, and you can modify these custom designs or create your own.
2. For the **Active From** and **Active To** fields, select the start and end dates for this custom design to be applied to this product. If you do not select a start date, the custom design is applied immediately. If you do not select an end date, the custom design is applied to this product until you manually deactivate it.
3. The **Custom Layout Update** is essentially a static block, with a few differences. Rather than HTML, the structure must be in XML format. The Update will appear at the bottom of the page, below the products, whereas a static block will appear above the products (if the static block is set to display with products). The Custom Layout Update will appear on the page only during the dates specified in the Active date range.
4. For **Page Layout**, select a layout from the drop-down list.
  - ❖ **No layout updates:** Uses the default settings that come with the Magento CE installation
  - ❖ **Empty:** Displays the category page without any objects, except for the content (products or static blocks only), category name, and view options (number to display per page, view as grid or list, and sort by options)
  - ❖ **1 column:** Displays the contents, category name and view options, as well as the header, footer, search field, and navigation bar
  - ❖ **Column on the left:** Adds the left column to the 1 column display, which by default includes the currency selection and layered navigation
  - ❖ **Column on the right:** Adds the right column to the 1 column display, which by default includes the shopping cart view, wishlist, compared products list, polls, and newsletter sign-up

- ❖ **3 columns:** Displays both the left and the right columns
- 5. For **Display Product Options In**, select a location for the product options to appear in the layout.

## Recurring Profile Tab

By default, the **Recurring Profile** tab only appears for simple and virtual products. However you can configure it to become available for other product types, by changing the **Apply To** option of the Enable Recurring Profile attribute. A recurring profile enables you to set and configure recurring payments on a product. These are most often used for subscriptions or products with installment payment plans. When a product like this is purchased from your store, the customer is redirected to a third-party payment system where a “recurring payment agreement” with the store is authorized by the customer. Currently, creating recurring profiles is available only for the PayPal Express Checkout payment method.

To enable a recurring profile for this product, select **Yes** for **Enable Recurring Profile**. Additional options become visible, as shown in Figure 103.

Recurring Profile
Create New Attribute

Enable Recurring Profile

Recurring Payment Profile

**Schedule** [GLOBAL]

Customer Can Define Start Date

Schedule Description   
▲ 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   
▲ Automatically bill the outstanding balance amount in the next billing cycle (if there were failed payments).

**Billing**

Billing Period Unit \*   
▲ 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.

**Trial Period**

Trial Billing Period Unit

Trial Billing Frequency

Maximum Trial Billing Cycles

Trial Billing Amount

**Initial Fees**

Initial Fee   
▲ Initial non-recurring payment amount due immediately upon profile creation.

Allow Initial Fee Failure   
▲ Whether to suspend the payment profile if the initial fee fails or add it to the outstanding balance.

Figure 103. Recurring Profile Tab

Most of the options on this tab are self-explanatory. For additional details on how recurring profiles work, see the <http://www.magentocommerce.com/knowledge-base/entry/working-with-recurring-profiles/> article in the Magento Knowledge Base.

**Note:** Creating a recurring profile for a product does not create subsequent orders in the Magento Admin Panel.

## Gift Options Tab

The **Gift Options** tab contains one option. The **Allow Gift Message** option determines whether customers are able to add a gift message to this particular product during checkout.

The default value of this setting is controlled by a Sales configuration setting (**System > Configuration > Sales > Gift Options**). To change this option, clear the **Use Config Settings** check box.

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## Inventory Tab

The **Inventory** tab enables you to control various aspects of inventory management for this product.

Many of the settings on this tab are controlled by the Inventory configuration settings (**System > Configuration > Inventory**). To override these configuration settings for this product, clear the appropriate **Use Config Settings** check box.

1. Select the **Inventory** option in the left panel to display the **Inventory** tab, as shown in Figure 104.

Inventory	
Manage Stock	Yes [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Qty*	0 [GLOBAL]
Qty for Item's Status to become Out of Stock	0 [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Minimum Qty Allowed in Shopping Cart	1 [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Maximum Qty Allowed in Shopping Cart	10000 [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Qty Uses Decimals	No [GLOBAL]
Backorders	No Backorders [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Notify for Quantity Below	1 [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Enable Qty Increments	No [GLOBAL] <input checked="" type="checkbox"/> Use Config Settings
Stock Availability	Out of Stock [GLOBAL]

Figure 104. Inventory Tab

2. In the **Manage Stock** field, select **Yes** to specify that all inventory options are available for this single product, or select **No** to specify that you do not want to manage product inventory (in this case, the product is permanently available in the store to your customers).
3. In the **Qty** field, specify how many items of this product you have in stock.
4. In the **Qty for Item's Status to become Out of Stock** field specifies that if stock quantity falls below this level, then the product becomes **Out of Stock**.
5. The **Minimum / Maximum Qty Allowed in Shopping Cart** fields enable you to limit availability to products that have great prices to retailers, so that they are not sold to wholesale customers.
6. In the **Qty Uses Decimals** field, select **Yes** to specify that customers can enter decimal quantities for this product, as opposed to integers. This is suitable for a product sold by the weight, volume or length. For example: 2.35 pounds of concrete or 3.75 feet of carpeting.

7. The **Backorders** field enables your customers to place an order for a product that has an in-stock quantity of less than 0. This option also enables you to notify your customers that even though there are no items of a product currently available, they can still place an order. You can do this by selecting the **Allow Qty Below 0** option and the **Notify Customer** option. You can also enable this option without notifying customers by only selecting the **Allow Qty below 0** option.
8. The **Enable Qty Increments** field enables you to choose whether this product is sold in quantities other than 1 (for example wine that is sold in multiples of 6 bottles). If you select **Yes** for this option, the **Qty Increments** field becomes visible, enabling you to specify the quantity increment for this product.
9. In the **Stock Availability** field, select the **In Stock** option if this product is in stock, or select **Out of Stock** otherwise.

## Websites Tab

The **Websites** tab enables you to choose which websites, stores, and store views this product is available on. Use the check boxes to make your selections. To set up websites, stores, and store views, see “Setting Up Your Store Hierarchy,” page 129.

1. Select the **Websites** option in the left panel to display the **Websites** tab, as shown in Figure 105.

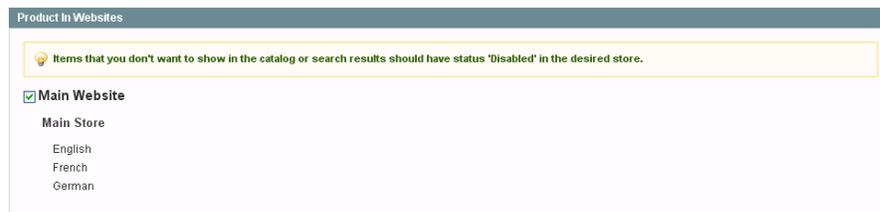


Figure 105. Websites Tab

2. If your store has more than one website, store or store view, you must assign the product to the appropriate website in order to make it available in this website.

**Note:** Sample Data contains three store views. If you want to create a product in the Sample Data environment, you must select the **Main Website** option when creating a product.

## Categories Tab

The **Categories** tab enables you to assign this product to one or more categories.

1. Select the **Categories** option in the left panel to display the **Categories** tab, as shown in Figure 106.



Figure 106. Categories Tab

- Specify the categories to which this product belongs by selecting the appropriate check boxes.

**Note:** You can assign a product to more than one category.

**Note:** You can also assign products to a category while editing the category.

## Related Products, Cross-Sell, and Up-Sell Tabs

Each of these pages is similar and enables you to configure relationships between products. The interface in Figure 107 appears in each of these pages:



Figure 107. Product Relationship Interface

- ❖ To display all the products in the list, click the **Reset Filter** button.
- ❖ Select the relevant checkboxes to assign products. You can use any of the filters available to make it easier to search for the products that you want.

For more information about these pages, see “Promotions,” page 181.

## Product Alerts Tab

This page is only available when alerts are enabled (**System > Configuration > Catalog**).



Figure 108. Product Alerts Tab

This page displays a list of the customers that have subscribed to each type of alert for this product, and the dates on which they were notified about changes.

## Product Reviews Tab

This tab provides a list of reviews posted by customers about a product that is being edited (the tab is not available for new product records for which there are no reviews). You can use the **Edit** button that appears in each review row to approve, edit or remove the review.

**Note:** The **Pending Reviews RSS** link enables you to receive notifications of all pending reviews and enables you to first approve them before they are shown on the site.

Page 1 of 1 pages | View 20 per page | Total 2 records found | [Pending Reviews RSS](#) Reset Filter Search

ID	Created On	Status	Title	Nickname	Review	Visible In	Type	Product Name	Product SKU	Action
	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
74	Aug 31, 2007 7:01:23 PM	Approved	Amazing	Me	What a cool shirt, i wear it everyday	Main Website Main Store German Main Website Main Store French	Guest	Coalesce: Functioning On Impatience T-Shirt	coal_1	<a href="#">Edit</a>
53	Aug 29, 2007 9:07:46 AM	Approved	Comfortable!!!	Essentl	This is the most comfortable shirt I own... I...	Main Website Main Store English Main Website Main Store French	Customer	Coalesce: Functioning On Impatience T-Shirt	coal_1	<a href="#">Edit</a>

Figure 109. Product Reviews Tab

## Product Tags Tab

This tab displays the tags that customers have assigned to a product, and how many times each tag was used. This tab is not available in new product records for which no tags have been assigned.

Tag Name	# of Use	Status
<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>
blue	1	Approved
bones	4	Approved
cool t-shirt	1	Approved
emo	1	Approved
Geil	1	Approved
good	1	Approved
green	3	Approved
hip	3	Approved
Hohoho	2	Approved
Hupe	1	Approved
mal	1	Approved
...	1	Approved

Figure 110. Product Tags Tab

**Note:** You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.

## Customers Tagged Product Tab

This page enables you to see which customers have tagged specific products.

First Name	Last Name	Email	Tag Name
John	Doe	john.doe@example.com	bones
John	Doe	john.doe@example.com	t-shirt
John	Doe	john.doe@example.com	hip
John	Doe	john.doe@example.com	mal
John	Doe	john.doe@example.com	young
John	Doe	john.doe@example.com	Test
John	Doe	john.doe@example.com	green
John	Doe	john.doe@example.com	tight
John	Doe	john.doe@example.com	young
John	Doe	john.doe@example.com	pas
John	Doe	john.doe@example.com	good

Figure 111. Customers Tagged Product Tab

**Note:** You can click on a tag row to edit it or Approve, Reject, Disable or Delete it.

## Custom Group Configuration Pages

Additional configuration pages may appear depending upon the groups that you have created using the Attribute Sets tool. See “Creating Attribute Sets,” page 94 for more information about attribute sets. An example custom group T-Shirts attribute is shown in Figure 112.

T-shirts Attributes
+ Create New Attribute

Gender \*  [GLOBAL]

Figure 112. Custom Attribute

Fill in the attributes that appear in this page according to the definitions that are specified in the attribute set. Some of these attributes may be mandatory and each may be one of a variety of types according to the definitions of the attribute set.

## Custom Options Tab

This page enables you to easily create product variants or products that can accept customer input, such as custom imprints or gifts. See “Creating Variations of a Product,” page 123, for more information on this topic.

## Product Type Dependent Configuration Pages

Depending upon the product type, additional configuration tabs may be available. The following provides a quick review of these types of pages.

### Downloadable Products: Downloadable Information Tab

The **Downloadable Information** tab enables you to specify options for a downloadable product.

The screenshot displays two configuration sections: 'Samples' and 'Links'.

**Samples Section:**

- Title: Samples [STORE VIEW]
- Table with columns: Title, File, Sort Order.
- File options: File (selected) with a browse button (...), and URL.
- Buttons: Add New Row, Upload Files.

**Links Section:**

- Title: Links [STORE VIEW]
- Links can be purchased separately: Yes [GLOBAL]
- Table with columns: Title, Price, Max. Downloads, Shareable, Sample, File, Sort Order.
- Price: [USD]
- Max. Downloads: 0, with an Unlimited checkbox.
- Shareable: Use config [v]
- File options: File (selected) with a browse button (...), and URL.
- Buttons: Add New Row, Upload Files.

Figure 113. Downloadable Information Tab

This page contains two sections:

- ❖ The **Samples** section enables you to display a sample of the downloadable product on the product's information page. For example, this can be a short sample of a music file, a few pages of an eBook, or a trial version of a software application. You can provide as many samples as you require by clicking the **Add New Row** button and filling out the fields. You can add files using either of two methods:
  - Selecting the **File** option, clicking the Browse button (...) and then clicking the **Upload Files** button. This will upload the file from your local computer to the server.
  - Selecting the **URL** option, specifying the link to a file that is already on a server in a different location, and clicking the **Upload Files** button.

Samples that you put in the Samples section appear in the store as shown in Figure 114.

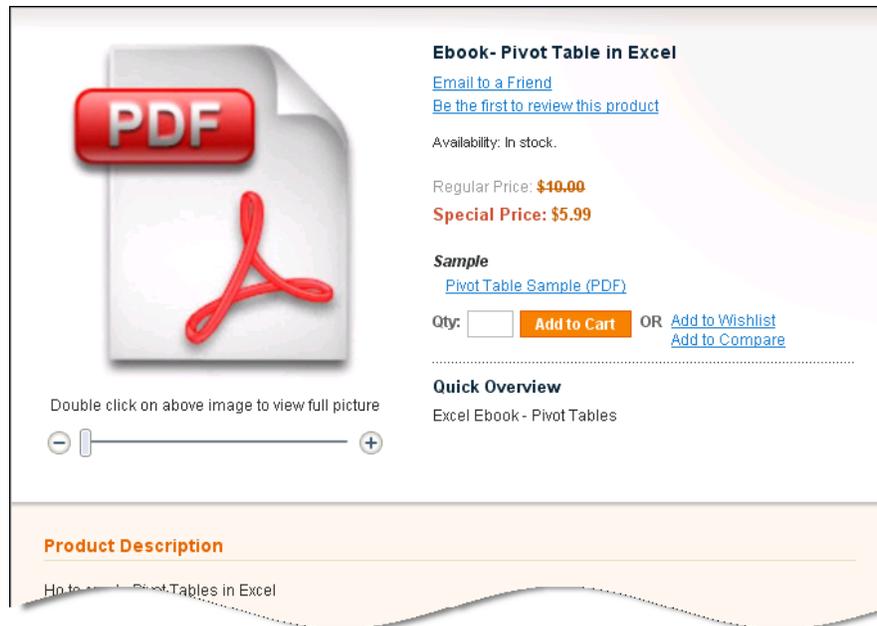


Figure 114. Downloadable Product Sample

- ❖ The **Links** section contains the actual products that can be purchased, along with possible samples for them.
  - The **Links can be purchased separately** option controls whether each of the downloadable products can be purchased by itself or not. This feature enables, for example, the tracks of a music CD product to be purchased separately. If you set this option to **Yes**, then you must input the price for each of the downloadable items.
  - Each of the items also has two options controlling its behavior. The **Max. Downloads** option controls how many times after purchase a product can be downloaded by the customer. The **Shareable** option controls whether after each purchase of the product, the downloadable item is available for download without logging in, or if it requires logging in. If the **Shareable** option is set to **Yes**, then customers can click links in the Order Confirmation email that they receive in order to get the product. However, this setting also enables anyone who gets this link to download the product. Setting this option to **Yes** is the only way to enable Guests to check out (or to enable a comparable quick checkout method, such as PayPal Express or Google Checkout) to download the product. There are configuration settings that must be selected to match your store.

The uploading process is similar to the uploading of the samples, as described above, with the exception of providing an option to tie in sample files for each downloadable product. This feature can be used to provide customers with a short sample of each track of a music CD, for example.

Figure 115 shows a product in a store with three links and samples for each of them, for which the setting **Links can be purchased separately** was set to **Yes**.

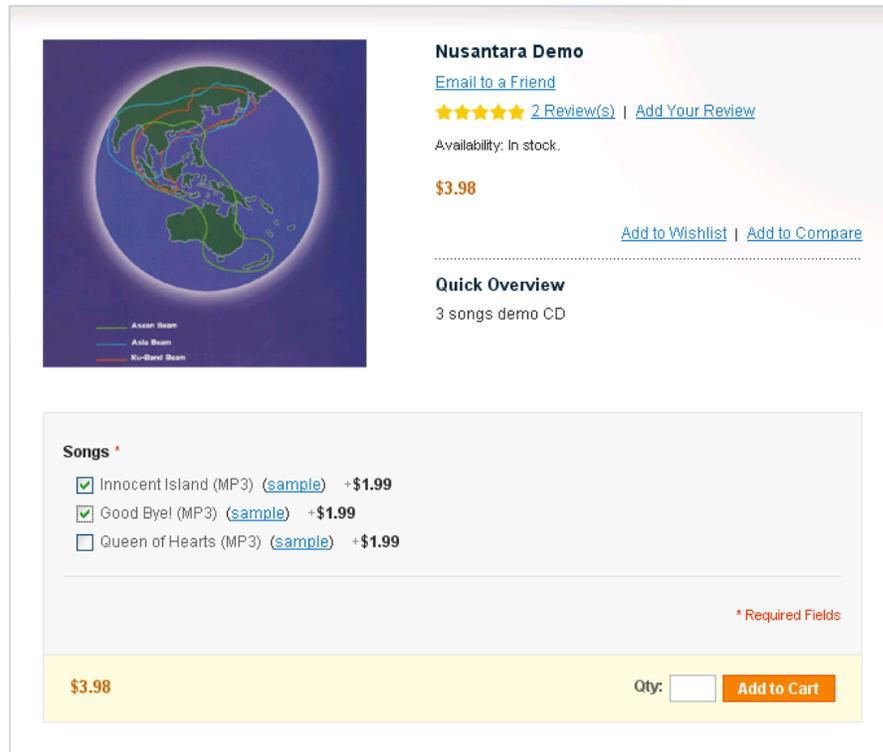


Figure 115. Downloadable Product Links and Samples

### Bundle Product: Bundle Items Tab

An example of a bundled product is the Build Your Own Computer offering found in the demo store, as shown in Figure 116.



Double click on above image to view full picture

⊖

|

⊕

### My Computer

[Email to a Friend](#)  
[Be the first to review this product](#)

Availability: In stock.

**From:** \$635.98  
**To:** \$3,786.70

**Price as configured:** \$112.50

[Add to Wishlist](#) | [Add to Compare](#)

---

#### Quick Overview

test description

**Case \***

Apevia Black X-Cruiser Case ATX Mid-Tower Case (Default) +\$112.50

**CPU \***

Choose a selection...

**Hard Drive \***

- Western Digital - 1TB HD - 7200RPM +\$299.25
- Western Digital 500GB HD - 7200RPM +\$224.25
- Seagate 500GB HD - 5400RPM +\$224.25
- Seagate 250GB HD - 5400RPM +\$74.25

**Ram \***

- Crucial 512MB PC4200 DDR2 533MHz Memory +\$74.99
- Crucial 1GB PC4200 DDR2 533MHz Memory +\$113.24
- Crucial 2GB PC4200 DDR2 533MHz Memory +\$149.99

**Monitor \***

- 1 x 30" Flat-Panel TFT-LCD Cinema HD Monitor +\$524.99
- 1 x 19" Widescreen Flat-Panel LCD Monitor +\$299.99
- 1 x 24" Widescreen Flat-Panel LCD Monitor +\$524.99
- 1 x 22" Syncmaster LCD Monitor +\$299.99

\* Required Fields

Qty: 1

Qty: 0

Qty: 0

Qty: 0

Qty: 0

**Price as configured:** \$112.50

Qty:

Add to Cart

Figure 116. Bundle Product

In Bundled product types, there are differences in the **General** and **Prices** pages, as follows:

- ❖ **SKU Fixed or Dynamic (General tab):** Specifies whether the entire product is assigned an SKU based on its components, or is the SKU fixed for the bundle.

- ❖ **Weight Fixed or Dynamic (General tab):** Specifies whether the entire product’s weight is based on the weight of its individual components, or is the weight fixed for the entire bundle.
- ❖ **Price Fixed or Dynamic (Price tab):** Specifies whether the price of the product is based on the price of its individual component, or is the price fixed for the entire bundle.
- ❖ **Price View (Price tab):** Specifies whether the product’s price is shown as a range, from the least expensive component to the most expensive (**Price Range**), or is only the least expensive shown (**As Low As**).

The **Bundle Items** tab contains the following settings:

- ❖ **Ship Bundle Items:** Specifies whether individual components are shipped separately or whether the entire product is shipped.
- ❖ **Bundle Items:** Bundled Items appear in the store as a list of available options. You can add a new option using the **Add New Option** button. For each option you can configure its title, input type (single and multiple selection fields are available), whether the field is mandatory (for example: it can be **True** for a computer processor and **False** for an additional battery of a laptop computer), and its position on the page.

Figure 117. **Bundle Items Tab**

After you add options, you can specify individual values for each option. Click the **Add Selection** button to open a selection area, as shown in Figure 118.

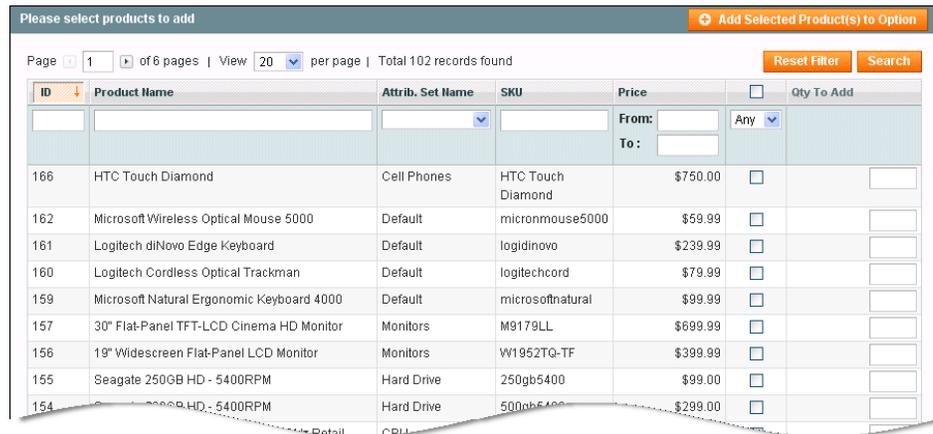


Figure 118. Adding Products to a Bundle

You can select any product that you want using the check boxes. Click the **Add Selected Product(s) to Option** button to confirm the assignment. For each selection, you can then define the following options:

- ❖ **Default Qty:** Specifies the default quantity shown in the product view page
- ❖ **User Defined Qty:** When set to **Yes**, this option enables customers to enter a quantity for a given selection
- ❖ **Position:** Specifies the Orders of a selection
- ❖ **Default:** Specifies the predefined value

### Grouped Product: Associated Products Tab

A grouped product enables you to purchase each of the items separately.

In the store, a grouped product appears as shown in Figure 119.

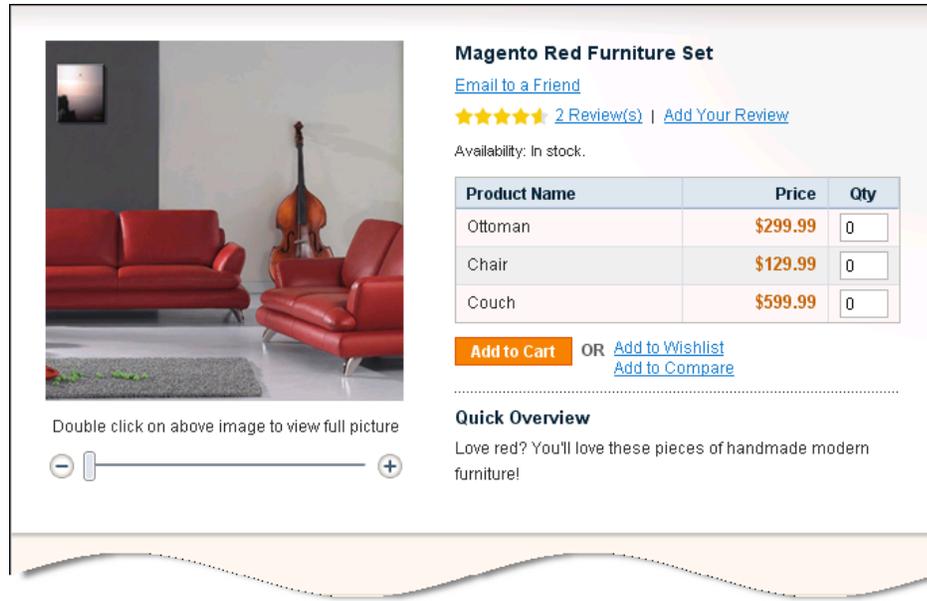


Figure 119. Grouped Product

When creating a Grouped Product, the Associated Products page enables you to specify which products are included in a group, as well as the default quantity for each and their position (order) on the page.

<input checked="" type="checkbox"/>	ID ↓	Name	SKU	Price	Default Qty	Position
Yes ▾				From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>
<input checked="" type="checkbox"/>	53	Couch	1113	\$599.99	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	52	Chair	1112	\$129.99	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	51	Ottoman	1111	\$299.99	<input type="text"/>	<input type="text"/>

Figure 120. Associated Products in a Grouped Product

**Note:** There is no global price for grouped products. Their price is controlled only by the individual elements that you purchase.

### Configurable Product: Associated Products Tab

Configurable products must be associated with simple products using attributes that a customer can select from a configurable product page. This means that when a shirt is offered in three sizes, then three simple products must be assigned to the configurable product, one for each size.

The configurable product appears in the store with a section that provides customers with options, such as the **Size** option shown in Figure 120.

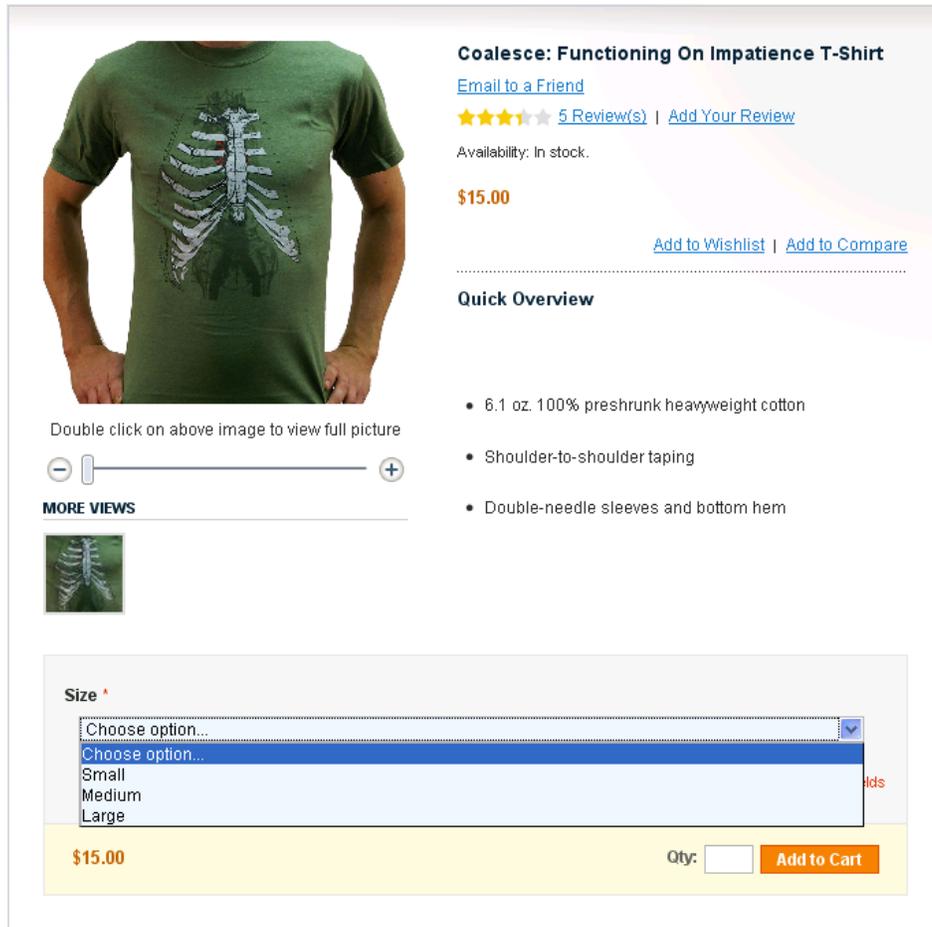


Figure 121. Configurable Product

This is the most complex configuration page and it is described below it in three stages.

### Select Configurable Attributes

This section enables you to select the product attributes that can be configured. The only attributes that are available on this tab are those that have a scope of **Global**, an input type of **Dropdown**, and the **Use to create configurable product** option set to **Yes**.



Figure 122. Select Configurable Attributes

Use the check boxes to select one or more desired attribute, and then click **Continue**.

## Create Simple Associated Product

This section enables you to create simple products along with the configurable product.



Figure 123. Create Simple Associated Product

Click the **Create Empty** button to open a popup window with a regular product creation page, but which has a preselected product type, **Simple Product**, and an attribute set that is the same as the configurable product.

The **Copy from Configurable** button works in a very similar manner to the above, but it pre-fills many of the fields with information from the selected configurable product, as shown in Figure 124.

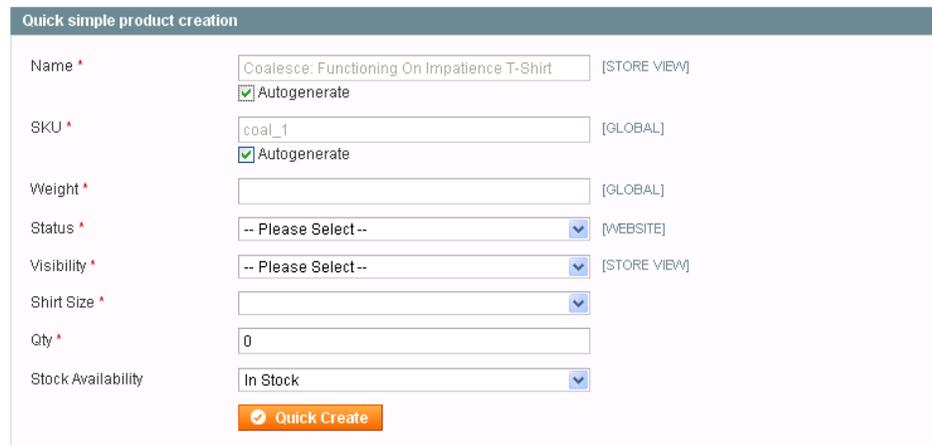


Figure 124. Quick Simple Product Creation

This area enables you to quickly create simple products without filling in all the information. Fill in the required fields and click the **Quick Create** button to create this product. The **Auto generate** option enables Magento CE to select the **Name** and **SKU** based on the attributes.

## Super Product Attributes Configuration

This section enables you to specify the attribute name that appears in the store for selection and the price for each of the options. Two price options are provided: **Fixed** or **Percentage**.

Super product attributes configuration

💡 Price values for options should be specified in system base currency.  
Attribute names can be specified per store.

**Shirt Size**      **Attribute Name:**

Option: **Small**      Price:  Fixed ▼

Option: **Medium**      Price:  Fixed ▼

Option: **Large**      Price:  Fixed ▼

The price for configurable products is a combination of the price from the **Prices** tab, as described in “Prices Tab,” page 101, and the values entered in this area. This means that if the configurable product’s price is \$20 and the price for the Medium option is: **Percentage** and **10**, then this variation of the product costs \$22. The price of the associated products is not used for calculation.

Page  of 1 pages | View  per page | Total 3 records found [Reset Filter](#) [Search](#)

<input checked="" type="checkbox"/>	ID	Name	Attrib. Set Name	SKU	Price	Inventory	Shirt Size	Action
Yes <span style="float: right;">▼</span>	<input type="text"/>	<input type="text"/>	<input type="text"/>	coal_	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	35	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_sm	\$15.00	In Stock	Small	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	117	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_md	\$15.00	In Stock	Medium	<a href="#">Edit</a>
<input checked="" type="checkbox"/>	118	Coalesce: Functioning On Impatience T-Shirt	Shirts T	coal_lrg	\$15.00	In Stock	Large	<a href="#">Edit</a>

Figure 125. Selecting Associated Products

## Completing the Product Wizard

Click the **Save** or **Save and Continue Editing** button in the top right corner of the page. If you choose the latter, after saving the product you are redirected back to its page.

### To edit an existing product:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products, as shown in Figure 126.

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Website	Action
45	Argus QC-2185 Quick Click 5MP Digital Camera	Simple Product	Cameras	QC-2185	\$37.49	120	Catalog, Search	Enabled	Main Website	Edit
46	Olympus Stylus 750 7.1MP Digital Camera	Simple Product	Cameras	750	\$181.94	932	Catalog, Search	Enabled	Main Website	Edit
156	19" Widescreen Flat-Panel LCD Monitor	Simple Product	Monitors	W1952TQ-TF	\$399.99	453	Catalog, Search	Enabled	Main Website	Edit
147	22" Syncmaster LCD Monitor	Simple Product	Monitors	226bw	\$399.99	385	Catalog, Search	Enabled	Main Website	Edit
152	24" Widescreen Flat-Panel LCD Monitor	Simple Product	Monitors	W2452T-TF	\$699.99	504	Catalog, Search	Enabled	Main Website	Edit
157	30" Flat-Panel TFT-LCD Cinema HD Monitor	Simple Product	Monitors	M9179LL	\$899.99	563	Catalog, Search	Enabled	Main Website	Edit
26	Acer Ferrari 3200 Notebook Computer PC	Simple Product	Computer	LXFR206.001	\$1,799.99	11	Catalog, Search	Enabled	Main Website	Edit
41	Akio Dresser	Simple Product	Furniture	384822	\$399.99	339	Catalog, Search	Enabled	Main Website	Edit
146	AMD A64 X2 3800+ 2.0GHz OEM	Simple Product	CPU	amda64	\$99.99	303	Catalog, Search	Enabled	Main Website	Edit

Figure 126. Product List

- Click the **Edit** link on the right side of the row of the relevant product.

## Mass-Changing Products

Magento CE provides various features that enable changes to be made on multiple products or their properties. On the product list, mark products using the selection check boxes. Then select one of the actions from the **Actions** dropdown field and click the **Submit** button:

- ❖ **Delete:** Deletes the selected products from the store.
- ❖ **Change Status:** Disables or enables multiple products at once.
- ❖ **Update Attributes:** Updates the attributes of multiple products. When you click the **Submit** button, a new page opens containing a list of all attributes for all selected products. Select the **Change** check box for any attribute that you want to change, then specify the new attribute values. Click **Save** to confirm the changes.

**Note:** You can use the **Duplicate Product** feature to create separate products without having to enter every value each time. To use it, click the **Duplicate** button on the product page of an existing product.

## 6.7 Creating Variations of a Product

This section describes how to create variations of a product by adding input controls (input options) to a product's page. An example of the variation of a product is the same product with different colors or sizes. In this case a customized field must be added by you to enable the customer to select the required color or size.

**Tip:** If you want to track the quantity that is sold of each variant of the product, you must create a separate product for each variant of the product and group them in the product of type Configurable, and not use the variations options described here.

To create variations of a product:

1. From the **Catalog** menu, select the **Manage Products** option to display a list of products.
2. Click the **Add Product** button to create a new product or click the **Edit** link to the right of the relevant product to open the edit page.
3. Select the **Custom Options** tab.
4. Click the **Add New Options** button on the top right of this page to display the controls shown in Figure 127.

The screenshot shows the 'Custom Options' interface. At the top right is an orange button labeled 'Add New Option'. Below it is a form with four columns: 'Title', 'Input Type', 'Is Required', and 'Sort Order'. The 'Input Type' dropdown menu is open, showing options: Text, Field, Area, Select, Drop-down, Radio Buttons, Checkbox, and Multiple Select. A 'Delete Option' button is visible on the right side of the form.

Figure 127. Creating Custom Options

5. In the **Title** field, specify a name for this new property, such as the name **Size**.
6. In the **Input Type** field, select the type of input that can be given in this field, such as text or dropdown menu, as shown above.
7. In the **Is Required** field, select **Yes** to indicate that this is a mandatory field, meaning that a customer must select an option in this field in order to purchase this specific product.
8. If there is more than one option, then specify the order in which this option appears in the **Sort Order** field. A value of **1** indicates that it appears first.
9. Click the **Add New Row** button to display the row shown in Figure 128, in which you can define the new variation of this product. For example, the product in a certain size and its corresponding price.

The screenshot shows the 'Custom Options' interface with a completed row. The 'Title' field contains 'Size', 'Input Type' is 'Drop-down', 'Is Required' is 'Yes', and 'Sort Order' is '1'. Below this is a table for variations:

Title *	Price	Price Type	SKU	Sort Order
XL	10	Fixed	shirt-xl	1

An 'Add New Row' button is located at the bottom right of the table.

Figure 128. Creating a Product Variation

10. In the **Title** field, specify the name of this variation of the product, such as **Size XL**.
11. All the prices in these rows are relative to the price of this product as defined in the **Prices** page of the product wizard described on page 101. In the **Price Type** field, select one of the following options:

- ❖ **Fixed:** To specify that the price of this variation of the product differs from the price of the base product by a fixed monetary amount, such as **\$1**.
  - ❖ **Percentage:** To specify that the price of this variation of the product differs from the price of the base product by a percentage, such as **10%**.
12. In the **Price** field, specify the difference between the price of this variation of the product and the price of the base product. Specify a fixed amount or a percentage according to the value that you entered in the **Price Type** field. You can also enter negative values.
  13. In the **SKU** field, specify the SKU for this variation of the product.
  14. If there is more than one variation, then specify the order in which this option appears in the **Sort Order** field. A value of **1** indicates that it appears first.
  15. Click the **Save** button. This example product is shown in the web store, as shown in Figure 129.



Figure 129. Product Variation in the Frontend

In this example, you can see that the price is **\$13.50**. However, if the **Green** color is selected, then the price is **\$18.75**, as shown in Figure 130.

Figure 130. Price Change for Product Variation

**Note:** If this product is added to the customer’s shopping cart, then the variation information appears there, as shown below:

Remove	Product Name	Unit Price	Qty	Subtotal
	 <p>Zolof The Rock And Roll Destroyer: LOL Cat T-shirt</p> <p>Size Small</p> <p>Color Green</p>	\$18.75	<input type="text" value="1"/>	\$18.75

Continue Shopping Update Shopping Cart

## 6.8 Importing and Exporting Product Data

Unless you have a small product catalog, the prospect of creating each product manually, one by one, is daunting. Magento CE has a solution: Import your product data from a comma-separated values (CSV) spreadsheet file. You can also export your product data to a CSV file.

### Working with CSV Files

In order to import a CSV file into Magento CE, it must have certain characteristics. Specifically, each column heading must exactly match the Attribute Code for the attribute in that column.

**Tip:** To ensure that a CSV file’s column headings are understood by Magento CE, first export a product CSV file (see “Exporting Product Data,” page 128). You can then edit this file (by adding or updating rows) and then re-import it.

For the Category column, specify product category in textual form based on a category’s path, with a slash (/) between each category level; for example, **Furniture/Living Room**. Do not include the Root Category in the path.

## Importing Product Data

With the Import feature, you can upload a file that contains the records for as many products as you want.

The file that you upload must be in Comma-Separated Values (CSV) format. Most spreadsheet and database applications can read and create CSV files.

### To import a product CSV file:

1. In the Admin Panel, select **System > Import/Export > Import** to open the Import page, as shown in Figure 131.

Figure 131. Import Page

2. Select **Products** from the **Entity Type** drop-down list.
3. Select one of the **Import Behavior** options from the drop-down list:
  - ❖ **Append Complex Data:** Adds new or edited products to your store’s database. Magento CE will not create duplicate entries for existing products and customers included in your CSV file.
  - ❖ **Replace Existing Complex Data:** Completely replaces your existing data or portions thereof.
  - ❖ **Delete Entities:** Completely deletes your existing database or portions thereof.
4. Click **Browse** and locate the CSV file in your local computer’s file system.

**Note** The total size of the CSV file must not exceed the maximum size for your environment (typically 32 MB) and must be saved with UTF-8 encoding. Check your spreadsheet or database application documentation for information about saving a CSV file with UTF-8 encoding.

5. Click **Check Data** to validate the uploaded file.
6. If the uploaded file is valid, a “File is valid!” response appears. Import your products or customers by clicking **Import**. If your file contains errors, Magento CE notifies you of the errors and enables you to skip the erroneous rows and importing the valid products or customers by clicking **Import**.

When the import is complete, the “Import was successfully done” message appears.

## Exporting Product Data

### To export product information:

1. In the Admin Panel, select **System > Import/Export > Export**.
2. Select **Products** from the **Entity Type** drop-down list. The system generates a list of entity attributes that are relevant to your products.
3. By default, all attributes are exported to the CSV file. In the Entity Attributes list, select the **Skip** check box for any attributes that you want to exclude from the CSV file.
4. By default, all records are exported to the CSV file. Use the controls in the **Filter** column to limit the records that are exported.
5. Click **Continue** to export your selected product information to a CSV file.
6. Open the saved file in your favorite spreadsheet application and edit as needed.

## 7 Setting Up Your Store Hierarchy

If you have planned your store hierarchy (see “Store Hierarchy,” page 25) and set up the appropriate root categories (see “Creating Categories,” page 81), you are ready to set up your store hierarchy.

To set up your store hierarchy:

1. In the Admin Panel, select **System > Manage Stores** to open the Manage Stores page, as shown in Figure 132.



Website Name	Store Name	Store View Name
<a href="#">Main Website</a>	<a href="#">Main Website Store</a>	<a href="#">aaaaaaa</a>
<a href="#">Main Website</a>	<a href="#">Main Website Store</a>	<a href="#">Default Store View</a>
<a href="#">Test Site</a>	<a href="#">Test Store 1</a>	<a href="#">French</a>

Figure 132. Manage Stores Page

2. To create a new website:
  - a. Click **Create Website** to open the New Website page.
  - b. In the **Name** field, specify a name for this website. Typically this will be the site’s domain name (for example, `somecompany.com`).
  - c. In the **Code** field, specify a code name that the Apache Web server will use to point to the domain name (for example, `somecompany_com`).
  - d. (Optional) In the **Sort Order** field, specify an integer number to determine where this website is listed in scope-selection drop-down lists in the backend. A specification of 1 places this website at the top of the list, 2 places it second, and so on.
  - e. Click **Save Website**.
3. To create a new store:
  - a. From the Manage Stores page, click **Create Store** to open the New Store page.
  - b. In the **Website** drop-down list, select the website that will be the parent of this store.
  - c. In the **Name** field, specify a name for this store.
  - d. In the **Root category** drop-down list, select the root category for this store. A root category can be assigned to more than one store, or to stores in different websites.
  - e. Click **Save Store**.
4. To create a new store view:
  - a. From the Manage Stores page, click **Create Store View** to open the New Store View page.

- b. In the **Store** drop-down list, select the store that is associated with this store view.
- c. In the **Name** field, specify a name for this store view, for example, **French**.
- d. In the **Code** field, specify a code for this store view, for example, **somecompany.fr**.
- e. In the **Status** drop-down list, select whether this store view is **Enabled** or **Disabled**.
- f. (Optional) In the **Sort Order** field, specify an integer number to determine where this store view is listed under its associated store in scope-selection drop-down lists in the backend. A specification of 1 places this website at the top of the list, 2 places it second, and so on.
- g. Click **Save Store View**.

**Note:** If you are associating a separate domain with each website, some modifications must be made to the web server configuration files. For details, see the following Magento Knowledge Base article:  
<http://www.magentocommerce.com/knowledge-base/entry/tutorial-multi-site-multi-domain-setup>

# 8 Taxes

Magento CE provides a variety of options for defining taxes that can be accessed by selecting the **Sales** menu and then the **Tax** option. Tax classes are used to define “tax rules.” Tax rules are defined as a combination of a Product Class, a Customer Class and a Tax Zone and Rate, as described below.

Each type of customer can be assigned a class when you define them, and each product is assigned a tax class. For a description of how to define a customer, see “Managing Customers,” page 218. For a description of how to define a product, see “Creating a New Product,” page 98.

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 defined by the customer’s shipping address, billing address or shipping origin).

Magento also supports the calculation of Value-Added Tax (VAT) for business-to-business transactions in the European Union. For more information, see “Appendix: VAT ID Validation,” page 259 Appendix: VAT ID Validation.

## 8.1 General Taxation Settings

To configure general taxation settings:

1. From the **System** menu, select the **Configuration** option.
2. From the **SALES** section in the panel on the left, select **Tax**.
3. Expand the **Tax Classes** section, and in the **Tax Class for Shipping** field, specify the tax class charged on the shipping amount, as shown in Figure 133. With Sample Data populated, we have added three examples of tax classes for Shipping. If your store changes additional tax on shipping expenses then you should designate the product tax class that will apply to shipping.



Figure 133. Tax Class for Shipping

4. Expand the **Calculation Settings** section, as shown in Figure 134.

**Calculation Settings**

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: Before 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]

Figure 134. Tax Calculation Settings

5. 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).
6. 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.
7. In the **Catalog Prices** field, specify whether the catalog prices of items include tax or exclude tax.
8. In the **Shipping Prices** field, select whether the shipping amounts include tax or exclude tax.
9. In the **Apply Customer Tax** field, select whether tax is applied to the original or discounted price.
10. In the **Apply Discount on Prices** field, select whether any discounts applied include the tax or exclude it.
11. In the **Apply Tax On** field, select whether tax is applied to custom prices or to original prices.
12. Expand the **Default Tax Origin Calculation** section to specify which country is used by Magento CE as the default for tax calculation, as shown in Figure 135.

**Default Tax Origin Calculation**

Default Country: United States

Default State: \*

Default Post Code: \*

Figure 135. Default Tax Origin Calculation

**Note:** If you set the **Display Product Prices** field to **Including Tax** in the **Display** section described below, then the tax is only displayed if there is a tax rule that matches the tax origin or if Magento CE detects that the customer address matches the tax rule (which happens after a customer creates an account, logs in, or uses the Tax and Shipping estimation tool in the cart).

13. Expand the **Price Display Settings** tab to select whether display prices for products and shipping include tax or exclude tax.
14. Expand the **Display** section to select how taxes and prices are shown for products and in a shopping cart according to the requirements (legal and otherwise) of your store, as shown in Figure 136.

The screenshot shows a 'Shopping Cart Display Settings' form with the following fields and values:

Setting	Value	Action
Display Prices	Excluding Tax	[STORE VIEW]
Display Subtotal	Excluding Tax	[STORE VIEW]
Display Shipping Amount	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]

Figure 136. Shopping Cart Tax Display Settings

15. Expand the **Orders, Invoices, Credit Memos Display Settings** tab to select how prices and taxes are displayed in orders, invoices, and credit memos.
16. Expand the **Fixed Product Taxes** tab to specify the behavior of fixed per product taxes, such as the European DEEE/WEEE (**Waste Electrical and Electronic Equipment**) tax, according to the requirements for your store and products.

**Note:** To assign a fixed tax to a product, create an attribute with the **Catalog Input Type for Store Owner** set to **Fixed Product Tax**, and assign this attribute to the attribute set for the product.

## 8.2 Product Tax Class

You create product tax classes and assign products to them depending on the type of product. For example, food might not be taxed (or might be taxed at a different rate).

To define a product tax class:

1. Select **Sales > Tax > Product Tax Class** to display the Product Tax Classes page (Figure 137), which shows a list of the previously defined product tax classes.

The screenshot shows the 'Product Tax Classes' page with the following details:

- Page: 1 of 1 pages | View: 20 per page | Total 3 records found
- Buttons: Add New, Reset Filter, Search
- Table with 1 column: Class Name
- Table rows: default, Shipping, Taxable Goods

Figure 137. Product Tax Classes Page

2. Click the **Add New** button to display the New Class page, as shown in Figure 138.

The screenshot shows the 'New Class' page with the following details:

- Buttons: Back, Reset, Save Class
- Section: Product Tax Class Information
- Form field: Class Name \* (My Tax Class)

Figure 138. New Product Tax Class Page

3. In the **Class Name** field, specify a name for this tax class.

**Note:** You can apply a tax class to a product by editing the product and choosing the appropriate option on the **Prices** tab.

4. Click **Save Class**.

## 8.3 Customer Tax Class

You create customer tax classes and assign customers to them depending on the type of customer. For example, in some jurisdictions, wholesale transactions are not taxed but retail transactions are.

To define a customer tax class:

1. Select **Sales > Tax > Customer Tax Classes** to display a list of the previously defined customer tax classes.
2. Click the **Add New** button to display the New Class page, as shown in Figure 139.

The screenshot shows a web interface for creating a new customer tax class. At the top, there is a header 'New Class' with three buttons: 'Back', 'Reset', and 'Save Class'. Below this is a section titled 'Customer Tax Class Information'. Inside this section, there is a form with a label 'Class Name \*' and a text input field containing the text 'Wholesale Tax'.

Figure 139. New Customer Tax Class Page

3. In the **Class Name** field, specify a name for this tax class.

**Note:** You can link a customer tax class to a customer group by editing the customer group. You can then assign this customer group when creating or editing a customer.

4. Click the **Save Class** button.

## 8.4 Tax Zones and Rates

Tax rates are generally applicable to transactions that take place in specific geographical areas. The Tax Zones and Rates feature 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).

## To define tax zones and rates:

1. Select **Sales > Tax > Manage Tax Zones and Rates** option to display a list of the previously defined tax zones and rates.

Tax Identifier	Country	State/Region	Zip/Post Code	Rate
US-CA-*Rate 1	United States	CA	*	8.25
US-NY-*Rate 1	United States	NY	*	8.375

Figure 140. Manage Tax Rates Page

2. Click **Add New Tax Rate** to display the Add New Tax Rate page, as shown in Figure 141.

Figure 141. Add New Tax Rate Page

3. In the **Tax Identifier** field, specify a unique name for this tax. Do not use spaces. This identifier is not shown in the web store if the **Tax Titles** section is filled in, as described below.
4. Select the location by using the **Country** and **State** drop-down lists.
5. For **Zip/Post is Range**, select whether the Zip or postal code specification needs to be expressed as a range of codes or an individual code.
  - ❖ If you select **No**, specify the Zip or postal code in the **Zip/Post Code** field. You can use the \* wildcard character in this field; for example, 90\* means all Zip codes form 90000 through 90999.
  - ❖ If you select **Yes**, specify the starting and ending Zip or postal codes in the **Range From** and **Range To** fields.
6. In the **Rate** field, specify the percentage of tax.
7. In the **Tax Titles** section, specify a name of this tax for each store view.
8. Click the **Save Rate** button.

## 8.5 Tax Management Rules

Tax management rules put all the taxation elements together: product tax classes, customer tax classes, and tax zones and rates.

### To define Tax Management Rules:

1. To define how taxes are charged, select **Sales > Tax > Manage Tax Rules** to display a list of the previously defined tax rules, as shown in Figure 142.

The screenshot shows the 'Manage Tax Rules' interface. At the top right is an 'Add New Tax Rule' button. Below the header, there are pagination controls: 'Page 1 of 1 pages', 'View 20 per page', and 'Total 2 records found'. There are also 'Reset Filter' and 'Search' buttons. The main content is a table with the following data:

Name	Customer Tax Class	Product Tax Class	Tax Rate	Priority	Sort Order
Retail Customer-Taxable Goods-Rate 1	Retail Customer	Taxable Goods	US-CA*-Rate 1, US-NY*-Rate 1	1	1
Retail Customer-default-Rate 1	Retail Customer	default	US-CA*-Rate 1, US-NY*-Rate 1	1	1

Figure 142. Manage Tax Rules Page

Each tax rule is composed of a customer tax class, a product tax class, and a tax rate.

2. To define a new tax rule, click **Add New Tax Rule** to display the Edit Rule page, as shown in Figure 143.

The screenshot shows the 'Edit Rule' page. At the top right are buttons for 'Back', 'Reset', 'Delete Rule', and 'Save Rule'. The main form is titled 'Tax Rule Information' and contains the following fields:

- Name \***: Retail Customer-default-Rate 1
- Customer Tax Class \***: Retail Customer
- Product Tax Class \***: default, Taxable Goods, Shipping
- Tax Rate \***: US-CA\*-Rate 1, US-NY\*-Rate 1
- Priority \***: 1
- Sort Order \***: 1

A note at the bottom right of the form states: 'Tax rates at the same priority are added, others are compounded.'

Figure 143. Edit Rule Page

3. Select a **Customer Tax Class**, **Product Tax Class** and **Tax Rate** for this rule. This rule defines that the tax rate you select is applied to the customers in the selected customer tax class and the products in the selected product tax class.

4. In the **Tax Priority** field, specify 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 a different priority apply then the taxes are compounded.
5. The **Sort Order** field enables you to specify the order in which tax rules are displayed on the Manage Tax Rules page.
6. Click **Save Rule** or **Save and Continue Edit** to save your changes.

**Tip:** When numerous taxes must be defined, you can ease the process by importing them from a spreadsheet. Select **Sales > Tax > Import/Export Tax Rates**.



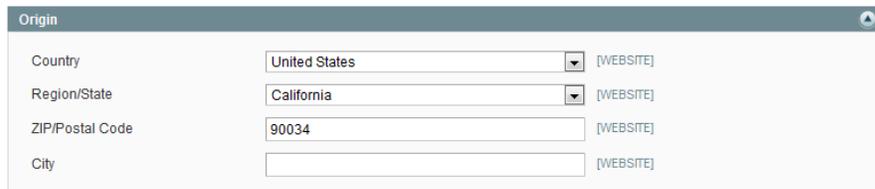
## 9 Shipping

A variety of shipping rates are available for selection in Magento CE. This section describes a few of these shipping rate options for your web store.

### 9.1 General Shipping Settings

To configure general shipping settings:

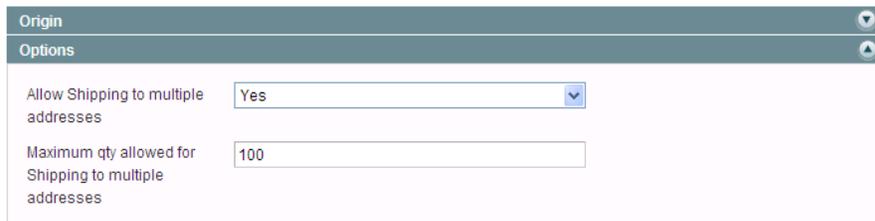
1. Select **System > Configuration > Shipping Settings**.
2. Expand the **Origin** section and specify the address used for shipping calculations. Typically, this is the warehouse address from which products are shipped, as shown in Figure 144.



The screenshot shows the 'Origin' section of the shipping settings. It contains four fields: 'Country' with a dropdown menu set to 'United States', 'Region/State' with a dropdown menu set to 'California', 'ZIP/Postal Code' with a text input field containing '90034', and 'City' with an empty text input field. Each field has a '[WEBSITE]' link to its right.

Figure 144. Shipping Origin Settings

3. Expand the **Options** section, as shown in Figure 145.



The screenshot shows the 'Options' section of the shipping settings. It contains two fields: 'Allow Shipping to multiple addresses' with a dropdown menu set to 'Yes', and 'Maximum qty allowed for Shipping to multiple addresses' with a text input field containing '100'.

Figure 145. Shipping Options Settings

4. In this section, enable or disable shipping to multiple addresses. Shipping to multiple addresses is very useful for stores that sell gifts. It enables customers to send various parts of an order to different destinations.
5. Click **Save Config** to save your changes.

### 9.2 Flat Shipping Rates

A flat shipping rate refers to a fixed predefined cost for shipping which can be applied per item or per shipment, according to your preferences.

To define flat shipping rates:

1. Select **System > Configuration > Shipping Method**.

- Expand the **Flat Rate** section to define a fixed predefined amount for shipping, as shown in Figure 146.

**Shipping Methods** [Save Config](#)

---

**Flat Rate**

Enabled:

Title:

Method name:

Type:

Price:

Calculate Handling Fee:

Handling Fee:

Displayed Error Message:

Ship to applicable countries:

Ship to Specific countries:

Sort order:

Figure 146. Flat Rate Shipping Settings

**Tip:** Magento CE also provides the option to specify table rates by expanding the **Table Rates** section. This feature enables you to define shipping rates by weight, destination, price, the number of items and various combinations of these categories. The table rates are entered by importing a CSV file. See <http://www.magentocommerce.com/knowledge-base/entry/how-do-i-set-up-table-rate-shipping> for more information.

- In the **Enabled** field, select **Yes**. The flat rate method then appears as an option in the shopping cart and on the shipping page during the checkout.
- The contents of **Title** and **Method name** fields appear in the frontend as shown in Figure 147.

1 Checkout method  
2 Billing Information  
3 Shipping Information  
4 **Shipping Method**  
5 Payment Information  
6 Order Review

**Flat Rate**  
Fixed \$5.00

Back Continue

**YOUR CHECKOUT PROGRESS**

[Billing Address](#) | [Change](#)

Test Customer  
Test Street 1  
Test Street 2  
Test City, California, 90123  
United States  
T: 123-123-1234

[Shipping Address](#) | [Change](#)

Test Customer  
Test Street 1  
Test Street 2  
Test City, California, 90123  
United States  
T: 123-123-1234

Shipping Method  
Payment Method

Figure 147. Flat Rate Shipping Method and Title

**Note:** Some Shipping Methods, such as UPS, provide a variety of shipping methods to choose from.

- In the **Type** field, specify the entity to which the shipping fee applies, such as **Per Item**. In this case, the shipping fee is dependent on the number of items shipped. If you set the rate to be per item, it is multiplied by the total quantity of items in the shopping cart. If you have two of the same item or two different items, then the rate is the same. You can also select **Per Order** in this field.
- In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that the appropriate (and different) shipping rates are applied to the relevant countries, as shown in Figure 148.

Ship to applicable countries

Ship to Specific countries

- Afghanistan
- Aland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda

Figure 148. Specific Countries Selection

**Tip:** Hold down the Ctrl key while clicking options to select multiple countries.

- In the **Sort Order** field, specify the position of this shipping method in relation to the other shipping methods offered to the customer.

## 9.3 Online Rates

Apart from static options such as flat rates and table rates, Magento CE also offers dynamic retrieval of rates from various shipping providers.

**Note:** Most shipping providers require that you open an account with them. Consult your shipping provider for details on how to obtain API credentials.

To enable and configure these shipping methods, expand the appropriate tabs (**UPS**, **USPS**, **FedEx**, or **DHL**) and configure the settings. The configuration of this method is similar to the configuration of a Flat Rate, as described above. The exact options depend on the service provider; contact the provider for more information.

For example, UPS rates can appear in your web store as shown in Figure 149.

1 Checkout method	<b>YOUR CHECKOUT PROGRESS</b> <a href="#">Billing Address   Change</a> Test Customer Test Street 1 Test Street 2 Test City, California, 90123 United States T: 123-123-1234 <a href="#">Shipping Address   Change</a> Test Customer Test Street 1 Test Street 2 Test City, California, 90123 United States T: 123-123-1234 Shipping Method Payment Method
2 Billing Information	
3 Shipping Information	
<b>4 Shipping Method</b> United Parcel Service <input type="radio"/> Ground \$8.96 <input type="radio"/> 3 Day Select \$9.89 <input type="radio"/> 2nd Day Air \$15.02 <input type="radio"/> Next Day Air \$23.17 Flat Rate <input type="radio"/> Fixed \$5.00 <a href="#">↑ Back</a> <a href="#">Continue</a>	
5 Payment Information	
6 Order Review	

Figure 149. UPS Shipping Options

## 9.4 Offering Free Shipping

**Tip:** Free shipping per product can be defined as a shopping cart price rule. See “Promotions,” page 181, for more information. This option enables you to set up free shipping that is valid only when a customer provides the appropriate discount code.

To define free shipping:

1. Select **System > Configuration > Shipping Methods**.
2. Expand the **Free Shipping** section to enable free shipping with optional minimum order amount, as shown in Figure 150.

The screenshot shows the 'Free Shipping' configuration window. The 'Enabled' dropdown is set to 'No'. The 'Title' field contains 'Free Shipping' and the 'Method name' field contains 'Free'. The 'Minimum order amount' field is empty. The 'Displayed Error Message' field contains the text: 'This shipping method is currently unavailable. If you would like to ship using this shipping method, please contact us.' The 'Ship to applicable countries' dropdown is set to 'All Allowed Countries'. The 'Ship to Specific countries' field is a scrollable list containing the following countries: Afghanistan, Aland Islands, Albania, Algeria, American Samoa, Andorra, Angola, Anguilla, Antarctica, and Antigua and Barbuda. The 'Sort order' field is empty.

Figure 150. Free Shipping Settings

3. In the **Enabled** field select **Yes** to enable the method.
4. In the **Minimum order amount** field specify the amount for an order over which shipping is provided free of charge.
5. In the **Ship to applicable countries** field, you can select the **Specific Countries** option to enable access to the field under it in which you can select specific countries, so that free shipping is only applied to the relevant countries or you can select the **All Allowed Countries** to specify that free shipping is available for users from all countries.

## 9.5 Acquiring Additional Shipping Modules

Numerous other shipping modules are provided at <http://www.magentoocommerce.com/magento-connect> and new ones are uploaded often. More information on installing shipping extensions is provided in “Extending Magento,” page 249.



# 10 Payment

Now that you have a method to calculate the cost of the shipping of your products, you can configure the payment options that enable the collection of money. Magento CE offers several payment options and many more can be added by downloading Magento payment module extensions, provided at <http://www.magentocommerce.com/magento-connect>. More information on installing payment module extensions is provided in “Extending Magento,” page 249.

The following shows how to set up some of the most popular payment methods. Setting up other options is just as simple.

## 10.1 PayPal

PayPal is one of the most popular ways to accept online payments. It enables you to accept credit cards and PayPal accounts. This section shows how to set up the PayPal Website Payments Standard method. Other PayPal payment methods are set up in a similar manner.

### To set up payment by PayPal Website Payments Standard:

1. Your first step is to create a PayPal merchant account. Please check with PayPal ([www.paypal.com](http://www.paypal.com)) for detailed instructions.
2. In the Magento CE backend, select **System > Configuration > PayPal** to display the PayPal page, as shown in Figure 151.

**Merchant Account**

Merchant Country:  [WEBSITE]  
▲ If not specified, Default Country from General Config will be used

Email Associated with PayPal Merchant Account:  [WEBSITE]  
▲ [Start accepting payments via PayPal](#)

**Select a PayPal Solution** [Help](#)

- Express Checkout** – Add an Express Checkout button to your existing shopping cart for quick and easy credit card payments. PayPal handles all payment processing. [View Demo](#) | [Learn More](#)
- Website Payments Standard** – PayPal processes all of your orders, and you get paid. [View Demo](#) | [Learn More](#)
- Website Payments Pro** – Process credit cards directly on your website with PayPal's all-in-one online payment processing solution. [View Demo](#) | [Learn More](#)
- Website Payments Pro Payflow Edition (includes Express Checkout)** – Accept PayPal payments in your shopping cart. PayPal will process your credit card payments through the Payflow Pro Gateway.
- Payflow Pro Gateway** – Don't have a PayPal merchant account? You can still accept credit card payments through the Payflow Pro Gateway. [Learn More](#)
- Express Checkout** – Accept payments without customers leaving your website. Many popular web-hosting services and shopping carts come with the Payflow payment gateways built in, so they are easy to set up.
- Payflow Link (for USA and Canada)** – Quick set-up service lets your customers securely complete transactions. [Learn More](#)

Figure 151. PayPal Page

3. In the Merchant Account section, select the country and specify the email address that is associated with your PayPal merchant account.
4. Select the **Website Payments Standard** check box to display the **Website Payments Standard Settings** section, shown in Figure 152.

**API/Integration Settings**

**Website Payments Standard Settings**

Title:  [STORE VIEW]  
▲ It is recommended to set this value to "PayPal" per store views.

Sort Order:  [STORE VIEW]

Payment Action:  [WEBSITE]

Payment Applicable From:  [WEBSITE]

Sandbox Mode:  [WEBSITE]

Transfer Cart Line Items:  [WEBSITE]

Debug Mode:  [WEBSITE]

**Paypal Billing Agreement Settings**

**Settlement Report Settings**

**Frontend Experience Settings**

Figure 152. PayPal Website Payments Standard Settings

5. In the **Title** field, specify a title to be shown to your customers.
6. In the **Sort Order** field, specify an integer number to indicate where this payment method should appear on the list of available payments on the frontend. A value of 1 places this payment at the top of the list, a value of 2 places it second, and so on.

7. In the **Payment Action** field, select one of the following options:
  - ❖ **Authorization:** Blocks or holds funds in the PayPal account until these funds have been transferred to your account. This usually occurs when you process the Order.
  - ❖ **Sale:** Specifies that funds are transferred to your account immediately.
8. In the **Payment Applicable From** field, leave the **All allowed countries** selection or select **Selected Countries** to select from a list of countries.
9. In the **Sandbox Mode** drop-down list, select whether this payment method is in sandbox mode. Sandbox mode is used when you are setting up and testing the payment method; no actual payments are processed.
10. In the **Transfer Cart Line Items** drop-down list, select whether information about each individual line item in the order is sent to the payment processor (**Yes**), or only the order total (**No**).
11. In the **Debug Mode** drop-down list, select whether this payment method is in debug mode. Debug mode is used when there is a problem processing a payment and you want to know what data is being exchanged with PayPal and where the error is occurring. Data (except for credit card numbers) is stored in the system log file.
12. Click **Save Config**.

**Note:** This procedure includes only the basic setup items for this particular PayPal payment method. For information about other PayPal payment methods and configuration options, see <http://www.magentoocommerce.com/knowledge-base/entry/setting-up-paypal-for-your-magento-store>.

## 10.2 PayPal Advanced

The PayPal Advanced payment method is available for merchants in the United States only.

### General Concept

The PayPal Payments Advanced payment method passes the information about the card, entered by a customer, directly to PayPal; it is never stored in your Magento system. A customer does not need to have a PayPal account to use this method.

The PayPal Advanced payment method is not available for orders created from the Admin Panel.

### Configuring PayPal Payments Advanced

To use the PayPal Advanced method, you should have a PayPal Payments Advanced account on PayPal. You need to have a separate account for each website.

Configuring the PayPal Advanced method for each website is a two-step procedure for each website:

1. Set the options in the Magento Admin Panel.
2. Set the required options of the PayPal Payments Advanced account on the PayPal Manager website.

## Setting PayPal Payments Advanced Options in the Magento Admin Panel

To configure the PayPal Advanced payment method in the Magento Admin Panel:

1. Log in to the Magento Admin Panel.
2. Navigate to **System > Configuration**.
3. Select the desired website from the **Current Configuration Scope** drop-down list in the upper-left corner of the page.
4. Under SALES in the left column, click **PayPal**. In the **Merchant Country** field select **United States**. If any other country is selected, the PayPal Payments Advanced settings are not displayed.
5. In the Select a PayPal Solution section, select the **PayPal Payments Advanced** check box to make the payment method settings available. When the check box is selected, the corresponding configuration field set appears. The following settings are available:
  - **Title:** In the **Title** field, specify the name of the payment method that will be displayed to customers in the Payment Information section of the one-page checkout. This parameter can be set up for each store view.
  - **Sort Order:** When deciding to use a number of payment methods, in the **Sort Order** field determine the sequence number of this method in the list of available methods in the Payment Information section of the one-page checkout.

**Note:** The payment methods for which the sort order is not set are displayed first.

- **Payment Action:** Choose what type of transaction is conducted when the order is placed, and the entities that will be created in the backend as a result. The following options are available:
  - **Authorization:** The payment is authorized and only an order is created in the backend of your store.
  - **Sale:** The payment is captured at PayPal's side, and as a result an order and an invoice are created in the backend of your store.
- **Payment Applicable From:** Choose the countries from which customers can use this payment method. Choose between the following options:
  - **All Allowed Countries:** Customers from the default countries list can use this payment method.

- **Specific Countries:** Only customers whose billing address includes one of the countries selected in the **Countries Payment Applicable From** field can use this payment method. The field basically works as a filter; so that this payment method will be listed for only those customers whose billing address is in one of these selected countries.
  - **Debug Mode:** In the **Debug Mode** field, specify whether communications with the payment system will be written into the log file. The log file for PayPal Payments Advanced is *payments\_payflow\_advanced.log*.
6. In the **API/Integration Settings** field set configure the following:
    - In the **Partner, User, Vendor** and **Password** fields, specify your PayPal Payments Advanced account credentials.
    - **Test Mode:** The test mode helps testing the integration of Magento with the PayPal payment system. Transactions that are submitted while the account is in the test mode are not actually submitted to the credit card and electronic check processing networks, and credit card or bank accounts are not actually charged. Therefore, these transactions do not have valid transaction IDs. When you finish testing the integration project, the test mode must be turned off.
    - **Use Proxy:** Decide whether the proxy server is used for establishing the connection between Magento and the PayPal payment system. If you select **Yes**, two additional fields for specifying the proxy host and port are displayed.
  7. Click **Save Config** in the upper-right corner of the page to save the settings.

## Setting the PayPal Payments Advanced Account Options on the PayPal Manager Website

To make the necessary settings for the PayPal Advanced account, take the following steps:

1. Log in to <https://manager.paypal.com/>
2. Navigate to **Service Settings > Hosted Checkout Pages**. Options should be configured in the Set Up and Customize sections.
3. Configure the options according to the recommendations displayed in the **PayPal Payments Advanced** field set in the Magento Admin Panel.

## PayPal Payments Advanced Method: Customer Experience

A store customer selects the PayPal Payments Advanced 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 opens in the customer's browser. The customer enters the card information and clicks **Verify Card**. If the transaction is successful, the customer is redirected to the order confirmation page.

**Note:** The form also contains the **Pay with PayPal** button; clicking it redirects a customer to the PayPal site, where the customer can complete the payment using PayPal Express Checkout.

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 handled on the PayPal side.

## Order Processing When the PayPal Advanced Payment Method Is Used

Processing of orders that are paid using the PayPal Payments Advanced payment method is the same to regular processing of orders that are paid 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.

When PayPal Advanced is used, an order is created in the Admin Panel once a customer clicks **PLACE ORDER** on the Order Review step of the one-page checkout. The order status upon creation depends on the response the system receives from PayPal, and can be one of the following:

- ❖ **Processing:** The transaction was successful
- ❖ **Pending Payment:** The system did not receive any response from PayPal
- ❖ **Canceled:** The transaction was not successful for some reason
- ❖ **Suspected Fraud:** The transaction did not pass some of the PayPal fraud filters. The system receives the response from PayPal that the transaction is under review by Fraud Service.

## 10.3 PayPal Express Checkout

Configuring the PayPal Express Checkout payment method is similar to setting up the other PayPal payment methods. For this reason, the details of the basic PayPal Express Checkout setup are not described here. However, there are two aspects of PayPal Express Checkout that you should be aware of when setting it up: Saving the customer's billing address, and Order transactions.

### Saving the Customer's Billing Address

Prior to version 1.11 of Magento Enterprise Edition and version 1.7 of Magento Community Edition, the PayPal Express Checkout payment method did not allow saving the complete billing address for the order in Magento. Starting with those versions this restriction has been removed and a complete billing address can be saved in a Magento order when the PayPal Express Checkout payment method is used by a customer. The billing address can be received from PayPal, and can be edited by the customer.

If you want to receive the billing address of a customer from PayPal for customers using the PayPal Express Checkout payment method, you need to take the following steps:

1. Enable the corresponding functionality is enabled in your PayPal merchant account. Contact the PayPal technical support for details.
2. In the Magento Admin Panel under **System > Configuration > SALES > PayPal > Express Checkout Settings** in the **Require Customer's Billing Address** field select **Yes**, and save the configuration. If you want to request customers billing address only for orders which contain downloadable and/or virtual products only, in the **Require Customer's Billing Address** field select **For Virtual Quotes Only**.

When customers choose to pay using PayPal Express Checkout, they are redirected to PayPal. Having logged in to PayPal and reviewed the payment information, they are redirected back to the store, to the Order Review page, where they choose the shipping method, edit the billing and shipping addresses and place the order.

**Note:** 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.

Figure 153 illustrates the Order Review store page when a customer uses the PayPal Express Checkout payment method.

## Review Order

Please confirm your addresses

**Billing Address**

\* First Name

\* Last Name

Company

\* Address

VAT Number

\* City

\* State/Province

\* Zip/Postal Code

\* Country

\* Telephone

Fax

Same as shipping

**Shipping Address**

\* First Name

\* Last Name

Company

\* Address

VAT Number

\* City

\* State/Province

\* Zip/Postal Code

\* Country

\* Telephone

Fax

**Shipping Method**

3 Day Select - \$17.63

Items in Your Shopping Cart | [Edit Shopping Cart](#)

PRODUCT NAME	PRICE	QTY	SUBTOTAL
Book	\$7.00	6	\$42.00
• Cover Hard			
Book2	\$5.00	2	\$10.00
Subtotal			\$52.00
Shipping & Handling (United Parcel Service - 3 Day Select)			\$17.63
Grand Total			\$69.63

Figure 153. The Order Review page when PayPal Express Checkout payment method is used.

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.

## Order Transactions in PayPal Express

Magento includes the option of using a new payment action, “Order,” 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.

## Configuring the Payment Action for the PayPal Express Checkout

To change the payment action settings for the PayPal Express Checkout payment method:

1. In the Magento Admin Panel, select **System > Configuration > SALES > PayPal**. Configuration can be done either on the global or website level, so in the **Current Configuration Scope** drop-down list located in the upper left part of the page, leave **Default Config** or select the desired website.
2. In the **Express Checkout Settings** field set, in the **Payment Action** drop-down menu, select **Order**.
3. Configure these additional settings, which correspond to settings in your PayPal merchant account:

- ❖ **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.
4. Click **Save Config** in the upper-right corner of the page to save the new configuration.

## Managing Orders Paid Using PayPal Express Checkout with 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 Panel. Two transactions are created for this order: one with type **Order** and one with type **Authorization**. See Figure 154.

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with 'Sales' selected. Below it, the 'Order View' section is active, showing details for 'Order # 200000001 | Jan 19, 2011 1:39:26 PM'. The main content area displays a table of transactions. The table has columns: ID #, Order ID, Transaction ID, Parent Transaction ID, Payment Method Name, Transaction Type, Is Closed, and Created At. There is one row of data:

ID #	Order ID	Transaction ID	Parent Transaction ID	Payment Method Name	Transaction Type	Is Closed	Created At
1	200000001	O-3A6137245J549934B		PayPal Express Checkout	Order	No	Jan 19, 2011 1:39:29 PM

Figure 154. Order transaction for PayPal Express Checkout

The funds on the customer’s account are put on hold, and you can capture the payment only from the Magento Admin Panel. To capture, you need to create an online invoice. Once 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 invoices 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.

If you click the **Void** button on the order view page, the Order transaction is voided. After this, no online invoice can be created for the order.

**Note:** PayPal provides an option of capturing an amount larger than was ordered. However, this option is not supported in Magento.

## 10.4 Other Payment Methods

To define payments methods:

1. In the Admin Panel, select **System > Configuration > Payment Methods** to display the Payment Methods page, as shown in Figure 155.



Figure 155. Payment Methods

A few payment options are described as follows.

### Saved Credit Cards

This option enables you to take credit cards and to process them offline. This method is useful when you have a card terminal in a brick and mortar store or have access to a virtual terminal. This payment method is enabled by default in the Sample Data.

**Tip:** When using the Credit Cards payment method it is highly recommended to configure an SSL certificate for your web store.

**Note:** Saving customer card data is discouraged unless absolutely necessary. Even though the data is encrypted it still poses a security risk to hold this information.

### To set up the Saved Credit Cards payment method:

1. Select **System > Configuration > Payment Methods** to display the Payment Methods page.
2. In the **Current Configuration Scope** drop-down list, select the scope for these configuration selections.
3. Expand the **Saved CC** section to define credit cards, as shown in Figure 156.

Enabled	Yes	[WEBSITE]
Title	Credit Card (saved)	[STORE VIEW]
New Order Status	Pending	[WEBSITE]
Credit Card Types	American Express Visa MasterCard JCB Laser UATP Diners Club Switch/Maestro Discover Solo	[WEBSITE]
Request Card Security Code	No	[WEBSITE]
3D Secure Card Validation	No	[WEBSITE]
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]
Payment from Specific Countries	Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina	[WEBSITE]
Minimum Order Total		[WEBSITE]
Maximum Order Total		[WEBSITE]
Sort Order		[WEBSITE]

Figure 156. Saved Credit Card Configuration Options

4. Make your configuration selections. Most of these options are self-explanatory. The options that may need some explanation are as follows:

- ❖ **Request Card Security Code:** Determines whether the payment method interface on the frontend requires the customer to supply the security code on the back of the card. If your credit card terminal requires the security code, set this option to **Yes**.
- ❖ **3D Secure Card Validation:** Determines whether credit card validation is carried out using the 3D Secure system. You must be a 3D Secure system subscriber, and you must first set up the general 3D Secure configuration options in **System > Configuration > Payment Services**.

5. Click **Save Config** to save your changes.

This option appears in the web store as shown in Figure 157.

The screenshot shows a checkout progress bar with six steps: 1. Checkout method, 2. Billing Information, 3. Shipping Information, 4. Shipping Method, 5. Payment Information (highlighted with an orange arrow), and 6. Order Review. The 'Payment Information' form contains the following fields:

- Check / Money order
- Credit Card (saved)
- Name on Card \*
- Credit Card Type \* (dropdown menu: --Please Select--)
- Credit Card Number \*
- Expiration Date \* (Month and Year dropdowns)
- Card Verification Number \* (with a 'What is this?' link)

At the bottom right of the form, there is a '\* Required Fields' label and a 'Continue' button. To the right of the main form is a 'YOUR CHECKOUT PROGRESS' sidebar with sections for Billing Address, Shipping Address, Shipping Method, and Payment Method.

Figure 157. Saved Credit Card Payment Method (Frontend)

Customers who place an order in your web store and use the Saved Credit Card payment method see their card details as shown in Figure 158.

The 'Payment Information' summary box displays the following details:

- Name on the Card: FirstName LastName
- Credit Card Type: Visa
- Credit Card Number: 4111111111111111
- Expiration Date: 12/2010
- Order was placed using USD

Figure 158. Credit Card Information (Frontend)

**Tip:** You can use the following test credit card number to test the payment methods in your web store:

**Visa 4111111111111111**

**MasterCard 5555555555554444**

**American Express 378282246310005**

Use any expiration date in the future, and for the CVV/CVC/verification code, use **123** or **000**.

## Checks and Money Orders

This payment method enables you to accept paper checks and money orders as payment. The order remains in Pending status until the payment is received (or clears your bank, if you prefer).

This payment method is enabled by default in the Sample Data. Expand the **Check/Money Order** section to define how checks and money orders are accepted in your web store, as shown in Figure 159.

Check / Money Order		
Enabled	Yes	[WEBSITE]
Title	Check / Money order	[STORE VIEW]
New Order Status	Pending	[WEBSITE]
Payment from Applicable Countries	All Allowed Countries	[WEBSITE]
Payment from Specific Countries	Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina	[WEBSITE]
Make Check Payable to		[STORE VIEW]
Send Check to		[STORE VIEW]
Minimum Order Total		[WEBSITE]
Maximum Order Total		[WEBSITE]
Sort Order		[WEBSITE]

Figure 159. Check/Money Order Configuration Options

In the **Make Check payable to** field, specify the name of the entity to which the checks must be made out.

This option appears in the web store as shown in Figure 160.

The screenshot displays the checkout process with the following elements:

- Progress Bar (Left):** A vertical list of steps: 1 Checkout method, 2 Billing Information, 3 Shipping Information, 4 Shipping Method, 5 Payment Information (highlighted in orange), and 6 Order Review.
- Payment Information (Main Content):**
  - Radio button selected:  Check / Money order
  - Text: Make Check payable to: TestCompany
  - Text: Send Check to:
  - Text: Test Address 1
  - Text: Test Address 2
  - Text: Test City, CA 90456
  - Text: United States of America
  - Radio button:  Credit Card (saved)
  - Text: \* Required Fields
  - Buttons: [Back](#) and [Continue](#)
- YOUR CHECKOUT PROGRESS (Right Sidebar):**
  - Billing Address | [Change](#)**
    - Test Customer
    - Test Street 1
    - Test Street 2
    - Test City, California, 90123
    - United States
    - T: 123-123-1234
  - Shipping Address | [Change](#)**
    - Test Customer
    - Test Street 1
    - Test Street 2
    - Test City, California, 90123
    - United States
    - T: 123-123-1234
  - Shipping Method | [Change](#)**
    - Flat Rate - Fixed \$5.00
  - Payment Method**

Figure 160. Check/Money Order Payment Method (Frontend)

## Other Payment Methods

There are numerous other payment methods available in the backend, and others can be obtained from Magento Connect (<http://www.magentocommerce.com/magento-connect>).

Most of the configuration options for these payment methods are similar to the options described in this chapter. Other configuration options are specific to each payment method, and you should consult the information you received when you subscribed to a given payment method to understand how these options work.



# 11 Design and Content

This chapter describes how to customize the look-and-feel of your web store by applying easy to use options that are provided in the Magento backend.

## 11.1 Overview

Magento provides a variety of simple-to-use design options that enable you to apply your own customized look-and-feel to your Magento web store with basic HTML knowledge.

**Tip:** See [http://www.magentocommerce.com/design\\_guide](http://www.magentocommerce.com/design_guide) for a description of how interfaces, themes, skins, layouts and blocks are used and to gain access to resources that will assist in their implementation.

## 11.2 Terminology

Following are some of the terms you should be familiar with when customizing the design of your store:

**Block:** A Magento CE feature that modularizes page elements for easier management.

**Content block:** Block that produces content, such as the content of a category list, mini cart, or product list. See also **Structural block**.

**Content Management System (CMS):** A Magento CE feature that stores pages or parts of pages that you can use in your store.

**Layout:** File that maps content blocks to structural blocks. More than one content block can be mapped to a single structural block.

**Skin file:** File that define the visual functional specifications of page elements, such as text, graphics, and the logic behind buttons and other controls.

**Structural block:** Block created for the sole purpose of assigning visual structure to a store page; for example, header, footer, left column, main column.

**Template:** A collection of XML and other files that define the block structure and logic for visual presentation.

**Theme:** a collection of templates and skin files that control the visual elements of your store. These visual elements are applied to all pages in your store, giving your store a consistent look and feel throughout.

## 11.3 Changing the Web Store's Theme

When you first install Magento CE, the design elements of your store are based on the Default Theme. You can modify this theme, add themes created by others, or create new themes from scratch.

**Tip:** To design your own theme, see the Magento Designers Guide at [http://www.magentocommerce.com/design\\_guide](http://www.magentocommerce.com/design_guide)

### To add and activate a theme in your store:

1. Go to the Magento Connect site (<http://www.magentocommerce.com/magento-connect>). This site contains hundreds of extensions, which are add-ons to Magento software that can extend or enhance the look or functionality of your store. New ones are uploaded often.
2. Click on the **Core** link to select one of the free extensions provided by Magento. The extensions are listed in the center of the page, as shown in Figure 161.

The screenshot displays the Magento Connect marketplace interface. At the top, there is a search bar and navigation links. The main content area features a 'Featured Core Extension' section for 'MagentoConnect Manager' by Magento Core, with 56 reviews and 378,187 downloads. Below this is a list of extensions sorted by 'Most Downloaded'. The 'Modern Theme' extension is selected, showing its details: 'Modern theme for Magento frontend interface', 130 reviews, and 96,698 downloads. Other visible extensions include 'Blank Theme', 'Blue Skin', and 'osCommerce Migration Tool'. A right-hand sidebar offers search filters and a list of extension categories.

Figure 161. **Magento Connect**

3. This example demonstrates the implementation of the Modern Theme. Scroll down the list of extensions and select the **Modern Theme**.
4. Install the theme as you would any other Magento extension. See “Extending Magento,” page 249, for more information.
5. You can now activate this theme so that the web store appears with a new layout. Select **System > Configuration > Design** and expand the **Themes** section. The Design page is displayed, as shown in Figure 162.

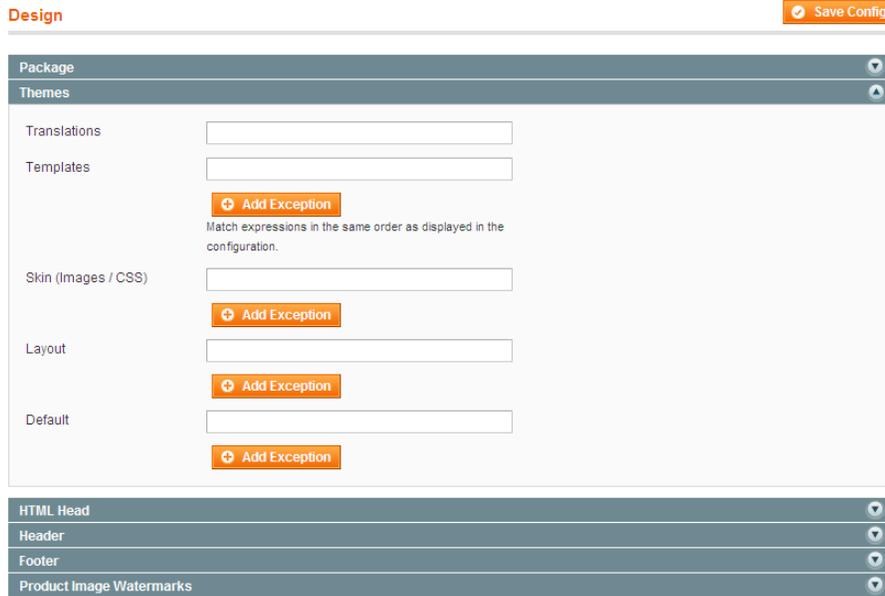


Figure 162. Design Page

**Tip:** The **Add Exception** option enables you to define special themes displayed for users using specific browsers. An example is showing an iPhone optimized theme for users using this device to browse the store.

6. In the **Default** field, specify the name of the theme. In this example it is called **Modern**.
7. Click the **Save Config** button on the top right of the page. The header, footer, menu bar, and background of the frontend now look different according to the new theme.
8. If your home page appears incorrect, it may be because the layout that you selected is suited to two columns when your home page has one column or vice versa. For the **Modern** theme, the following change must be applied so that that the frontend home page appears properly. From the top menu bar in the Admin Panel, select **CMS > Pages** to display the Manage Pages page, as shown in Figure 163.

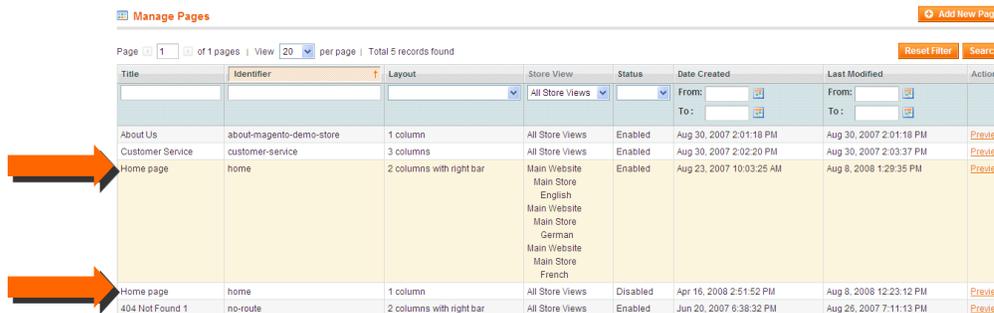


Figure 163. Manage Pages Page

This page shows two Home Page rows:

- ❖ One row has the value **2 columns with right bar** in its **Layout** column and its **Status** column shows **Enabled**.

- ❖ The other row has the value **1 column** in its **Layout** column and its **Status** column shows **Disabled**.
9. Click on the first and second rows of the homepage. The page shown in Figure 164 is displayed for each of them.

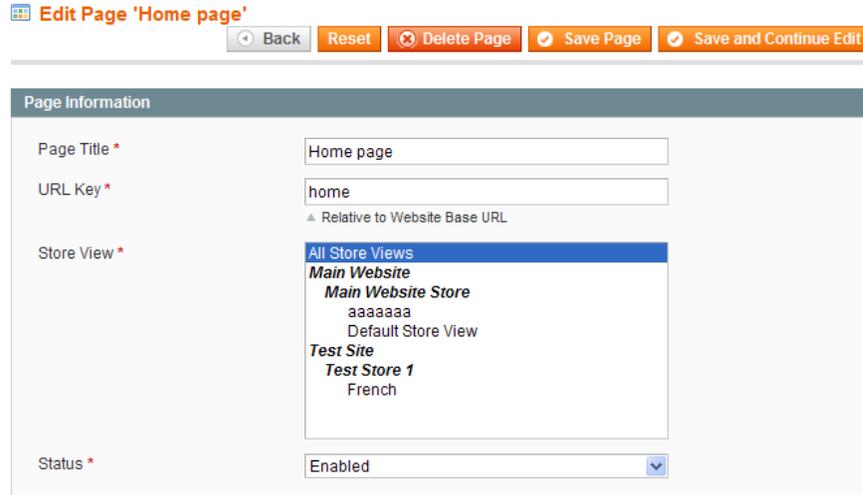


Figure 164. Edit Page Page

- ❖ Change the **Enabled** status of the page with **2 columns with right bar** layout to **Disabled**.
- ❖ Change the **Disabled** status of the page with **1 column** layout to **Enabled**. The homepage of the frontend now appears similar to the page shown in Figure 165.



Figure 165. Frontend Home Page With New Theme

## 11.4 Managing CMS Pages

Content Management System (CMS) pages are static pages such as your **Homepage**, **About Us** and **Customer Service** pages that provide information about the web store and are managed through the Backend panel. CMS Pages are full pages that are available via their own URL addresses. Static Blocks are sections of code or graphics that can be referenced inside CMS pages as well as Category landing pages. They are page elements that can be reused and referenced throughout your site.

The following example shows how to create a new page in Magento CE and then how to create a link to it from your store footer.

To add a CMS page:

1. Select **CMS > Pages** to display the list of currently defined CMS pages as shown in Figure 163.
2. Click the **Add New Page** button on the top right of the page to display the New Page page, as shown in Figure 166.

Figure 166. New Page Page

3. In the **Page Title** field, specify the words to appear in the browser's title bar.
4. In the **URL Key** field, specify the unique identifier to be used in the URL. It must contain all lower case letters and no spaces. The following example uses `our_history`.
5. Leave the default value in the **Store View** field.
6. In the **Status** field, select **Enabled**.
7. Click **Content** in the left navigation bar. Use the WYSIWIG editor to define the content for this page.
8. Click **Design** in the left navigation bar to open the design options, as shown in Figure 167.

The image shows two panels from a web design tool. The top panel, titled 'Page Layout', has a 'Layout' dropdown menu currently set to '1 column' and a large empty text area labeled 'Layout Update XML'. The bottom panel, titled 'Custom Design', contains several configuration options: 'Custom Design From' and 'Custom Design To' are text input fields with small icons to their right; 'Custom Theme' and 'Custom Layout' are dropdown menus both currently showing '-- Please Select --'; and 'Custom Layout Update XML' is a large empty text area.

Figure 167. Custom Design Options

9. Click the **Layout** field and then select one of the following options:
  - ❖ **Empty:** Shows the content of an empty page with no header, footer or side bars.
  - ❖ **1 Column:** Displays all the content entered in a single central column with a header and footer.
  - ❖ **2 Columns with left/right bar:** Displays all the content entered on the page with a header, footer and left/right bar.
  - ❖ **3 columns:** Displays both the left and right columns from the design package with the content shown between.
10. Click **Save Page**. You can now open a browser and browse to this Landing page. The URL is taken from the value that you specified for **URL Key**, as described above. For example: `/our_history` is added to the web store's URL.

11. The following steps show how to add a link to this page from the frontend's footer. Select **CMS > Static Blocks** option to display the list of existing Static Blocks.

12. Click on the **Footer Links** row to display the definition of the frontend's footer.

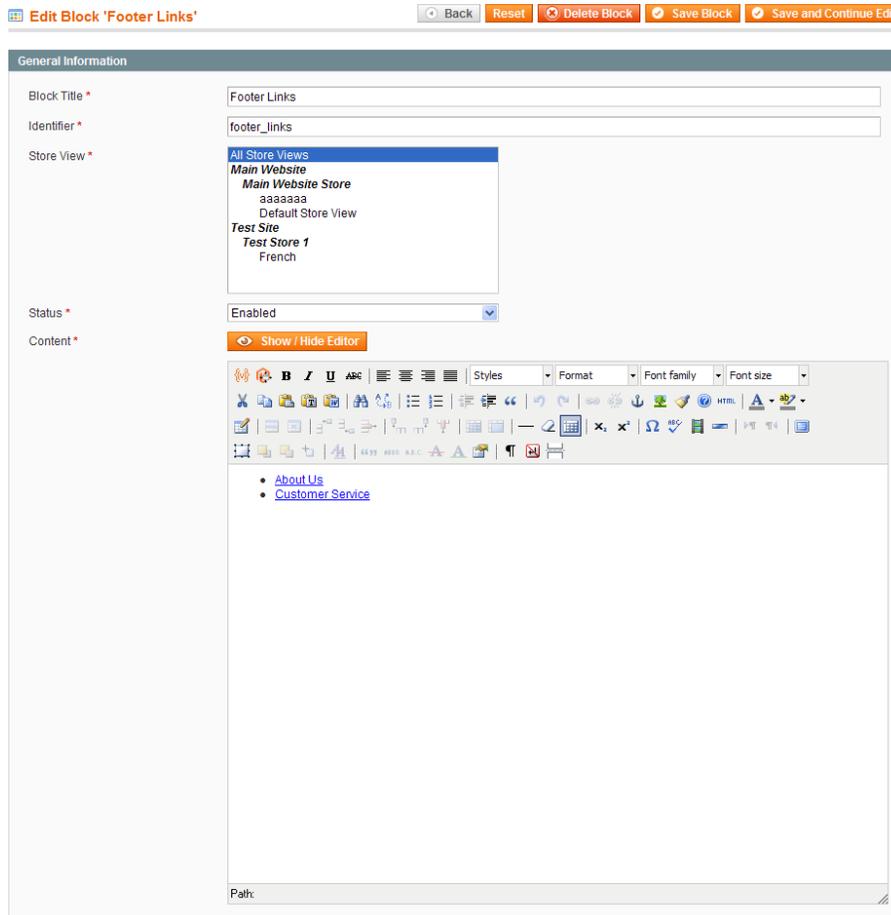


Figure 168. Editing a Static Block

13. In the **Content** field, use the WYSIWYG editor to add a link to the new page. You can do this by pressing ENTER after one of the existing links, typing the link text, selecting this text, and clicking the Link icon (  ). Use the Insert/Edit Link dialog box to specify the link attributes, as shown in Figure 169.

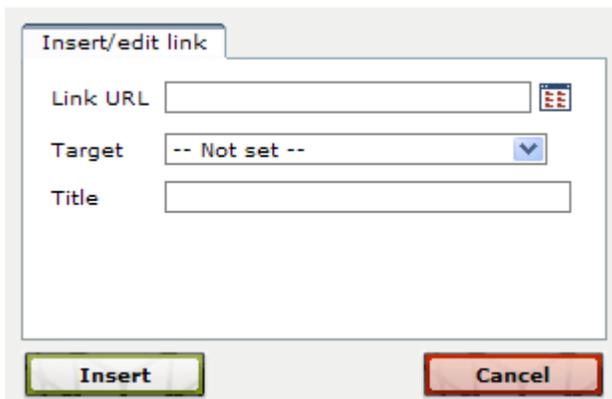


Figure 169. Insert/Edit Link Dialog Box

The footer of the frontend now appears as shown in Figure 170.

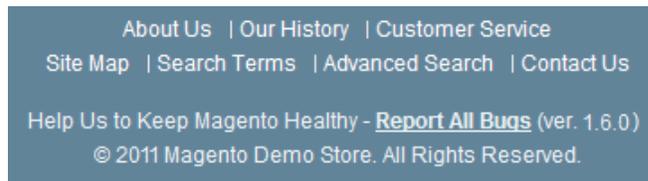


Figure 170. Updated Footer Block

## 11.5 Customizing Transactional Emails

Transactional Emails are all emails sent from a Magento CE store. Magento CE offers flexible, easy-to-use functionality to enable you to customize these emails and translate them into multiple languages to best use them for communication with your customers.

This section describes how to modify the emails that are sent from the web store, for example, when an account is created or an order is placed.

### To customize a transactional email template:

1. Select **System > Transactional emails** to display a list of the custom email templates created in this web store.

**Note:** This page shows only customized emails. If this page is empty, it means that Magento will only send standard default emails.

2. Click the **Add New Template** button to display the New Email Template page.

**New Email Template** Back Reset Convert to Plain Text Preview Template Save Template

**Load default template**

Template \*

Locale \*

Load Template

**Template Information**

Template Name \*

Template Subject \*

Insert Variable...

Template Content \*

Template Styles

Figure 171. New Email Template Page

3. In the **Template** field, select the name of one of the transactional emails that you want to customize, such as **New account**.
4. In the **Locale** field, select the language.
5. Click **Load Template**.
6. In the **Template Name** field, specify a name for the customized email template.
7. If desired, modify the **Template Subject** field.
8. In the **Template Content** area, use the WYSIWIG editor to modify the content. You must change the contact phone number and email address as well as the logo image reference at the top of the page to reflect your own store information in all active templates.
9. Click the **Save Template** button.
10. Now that your customized email template is ready and available, the next step is to inform Magento CE that it should use this template to send email to customers instead of the default template. This is controlled in various configuration sections depending on the type of email.

In our example of customizing a New Account email, select **System > Configuration > Customers > Customer Configuration**. Then expand the **Create New Account Options** section and select your newly customized transactional email in the **Default Welcome Email** field.

## 11.6 Facebook Open Graph Extension 2.0 for Magento

The Facebook Open Graph 2.0 extension enables you to add custom social networking buttons to your store. The extension uses the new Facebook Open Graph 2.0 protocol.

### Compatibility

The Facebook Open Graph 2.0 extension is compatible with Magento Enterprise Edition and Professional Edition 1.8 and later, and Magento Community Edition 1.3 and later.

### Downloading and Installing

The Facebook Open Graph 2.0 extension is free of charge; you can download it from [Magento Connect](#), the official marketplace for Magento extensions.

### Installing

You can install the extension using the Magento Connect Manager. To access it in the Magento Admin Panel navigate to **System > Magento Connect > Magento Connect Manager**.

### Setting Up

To make new social networking buttons appear in your store, after installing the extension you need to take two basic steps:

1. Create an application on the Facebook Developers site
2. Configure Magento

In the following subsections these procedures are described in detail.

### Creating an application on the Facebook Developers site

The current implementation of the Facebook Open Graph 2.0 extension requires an application to be created manually on the Facebook Developers site.

#### To create an application:

1. Navigate to <http://developers.facebook.com/>
2. Click **Apps** in the top menu

3. Click **Create New Application** and perform all of the steps of the app creation wizard. Using the app by the Facebook Open Graph 2.0 extension implies the following restrictions and requirements:
  - Please note, that the App Namespace value, which you set on the first step of the app creation, will be used in Magento configuration. In the left column select **Settings > Basic**. Under the **Select how your app integrates with Facebook** heading select **Website**. In the **Site URL** field enter your store address. See Figure 172.

**Important Note:** Your website and store should have one domain name.

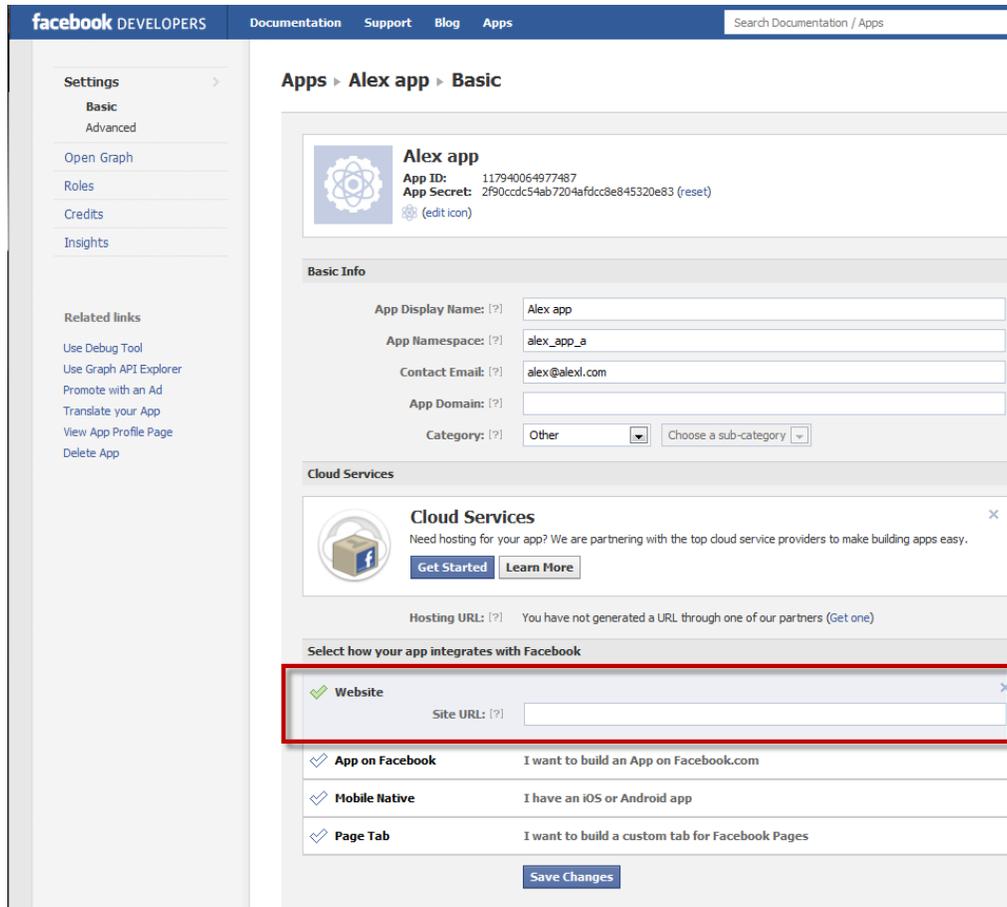


Figure 172. Website settings on Facebook Developers

- 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. See Figure 173.

The screenshot shows the Facebook Developers interface for configuring an 'Action Type: Own'. The left sidebar contains navigation links like 'Settings', 'Open Graph', 'Roles', and 'Credits'. The main content area is titled 'Apps > x.com int > Open Graph > Action Type: Own'. It features several input fields and buttons: 'Name' (Own), 'Connected Object Types' (pr), 'Action Properties' (Start Time, End Time, pr), and 'Past Tense' (owned). A red box highlights the 'Graph API URL' field, which is set to 'graph.facebook.com/me/x\_com\_int: own'. At the bottom, there are 'Save Changes' and 'Cancel' buttons.

Figure 173. Object Type settings in the Facebook Developers Application

**Note:** You cannot set the “dislike” action as it is not supported by Facebook Open Graph 2.0.

- 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. See Figure 174.

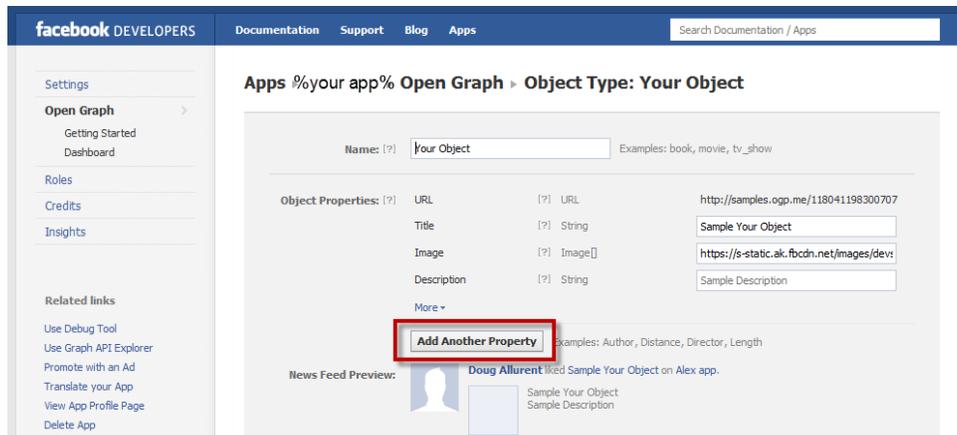


Figure 174. Adding properties to an Object Type

## Configuring Magento

To configure the Facebook Open Graph 2.0 extension settings in Magento Admin Panel:

1. Navigate to **System > Configuration > SOCIAL > Facebook**. If you don't see the SOCIAL heading in the left column, you may have not installed the extension.
2. In the **Current Configuration Scope** drop-down list in the upper left corner of the page select your website.
3. Under **Facebook Config** set the following:
  - ❖ **Enable Facebook on Frontend:** Select **Yes** if you want social buttons to appear on the frontend.
  - ❖ **App Namespace:** 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. See Figure 175 for illustration.

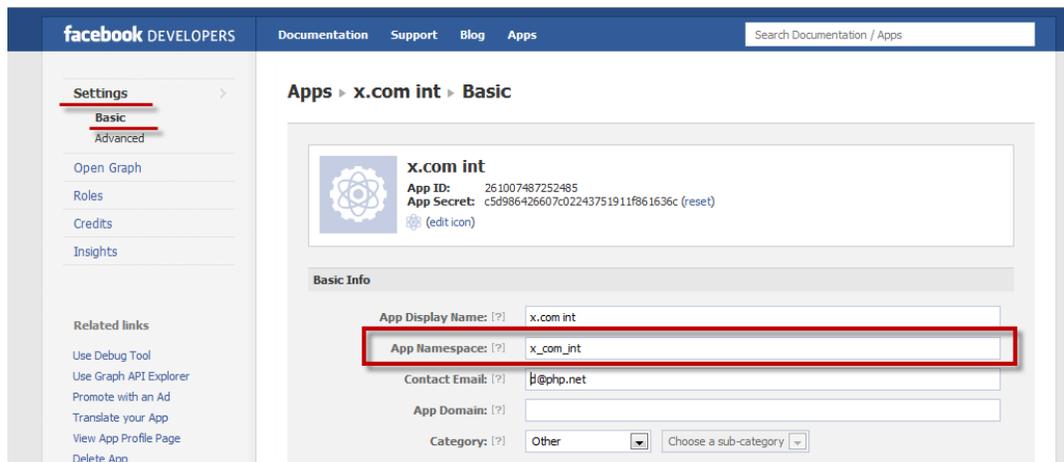


Figure 175. App Namespace value

- ❖ **App ID and App Secret:** Specify the App ID and App Secret values of your application. You can find it in the Basic Settings section of your app on the Facebook Developers site. See Figure 176.

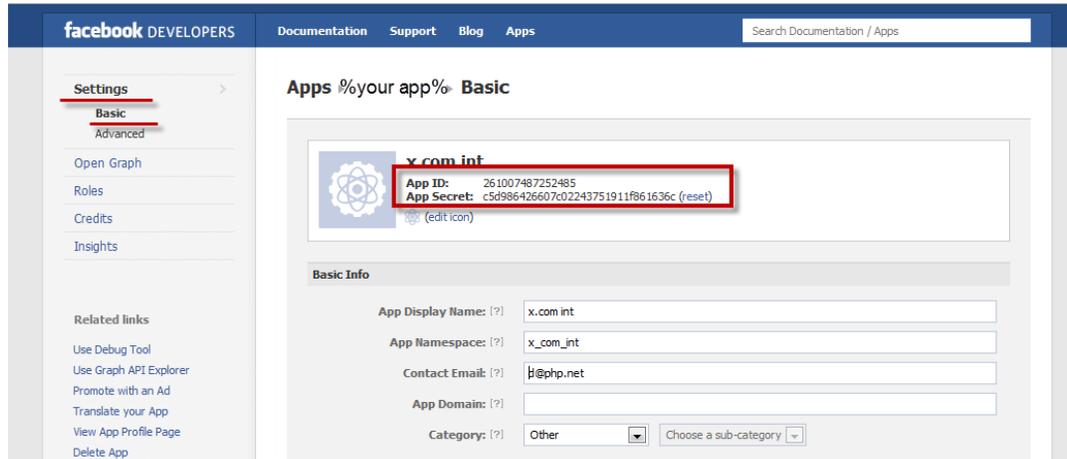


Figure 176. App ID and AP Secret values

- ❖ **Object Type** – 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%**. See Figure 177.

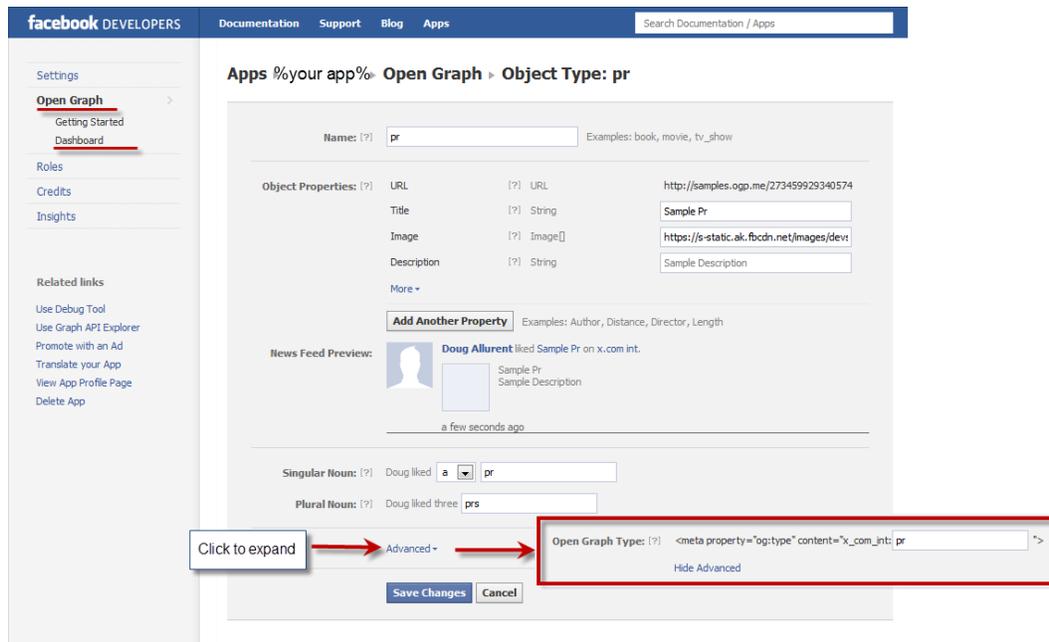


Figure 177. Open Graph Type setting

- ❖ **Actions Settings** (can be different for each store view: To add and configure a social networking button, click **Add Action Button**. For each button, specify the following:
  - 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. See Figure 173.
  - In the **Button Title** column, specify the name of the social networking button as you want it to appear in the frontend.
  - In the **Enable FriendBox** column decide if you want to display in the frontend the related Facebook block, which contains the count and the pictures of friends.
  - In the **Count in FriendBox** 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.

4. To save the configuration, click **Save Config** in the upper right corner of the page.

Now the social networking buttons you have created and the corresponding Facebook blocks will appear on the product pages of your web store. In the following section of this guide you can find the detailed description and illustrations of how these buttons look and work.

## Facebook Open Graph 2.0 Extension: Web Store Customer Experience

When the Facebook Open Graph 2.0 extension is successfully installed and all configuration is done, the social networking buttons will be displayed on each product page in the frontend, along with the Facebook blocks providing the information about other Facebook users and friends who clicked your social networking buttons for the product (if set to be displayed). Information provided in the blocks depends on the customer who is logged in to Facebook and whether his or her friends have performed some actions with your app (that is clicked your social buttons). The following situations are possible (in this example, the **Want** and **I own this** social networking buttons were added):

1. Customer is not logged in to Facebook. See Figure 178.



Figure 178. Product page for a customer who is not logged in to Facebook

- Customer is logged in to Facebook, but none of the customer's friends wants or owns the product. See Figure 179.

Default welcome msg! [Log In](#) or [register](#)

**Magento** MY ACCOUNT | MY WISHLIST | MY CART (0) | CHECKOUT

Enter search keyword

Computers

Home / Computers / **Lenovo IdeaCentre A320 21.5 inch All-in-One Desktop PC**



Click on image to zoom



**Lenovo IdeaCentre A320 21.5 inch All-in-One Desktop PC**

[1 Review\(s\)](#) | [Add Your Review](#)

Availability: **In stock**

**\$500.00**

 1 people own or want this. Be the first of your friends.

Qty:   [Add to Wishlist](#) [Add to Compare](#)

**Details**

- Product Features: Intel Core i3-2310M 2.1GHz
- Processor: World's slimmest
- AIO design integrated
- TV Tuner and remote control
- Wireless Bluetooth
- Keyboard and Mouse
- YouCam - advanced webcam software for facial tracking and image effects
- Lenovo Dynamic Brightness System - protects your eyes by automatically adjusting screen brightness based on ambient light conditions

[► Email to a Friend](#)

**Product Tags**

Add Your Tags:

Use spaces to separate tags. Use single quotes (') for phrases.

**SIGN UP FOR OUR NEWSLETTER**

Sign Up for Our Newsletter:

Enter your email address

[Site Map](#) | [About Us](#)

[Search Terms](#) | [Customer Service](#)

[Advanced Search](#)

[Orders and Returns](#)

[Contact Us](#)

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Figure 179. Product page a customer who is logged in to Facebook, but none of his or her friends wants or owns the product

- Customer is logged in to Facebook, but he or she has not performed any action with the app yet. See Figure 180.

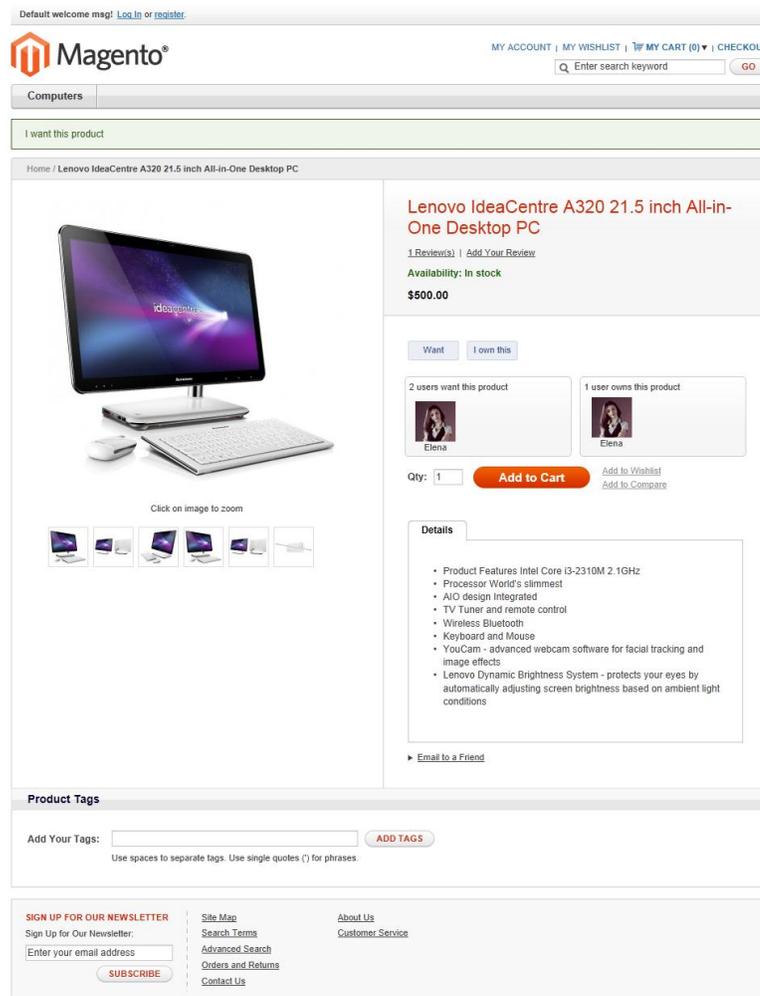


Figure 180. Product page for a customer, who is logged in to Facebook, but he or she has not performed any action with the app yet

- Customer is logged to Facebook, and his or her friends have already performed some action with the app. See Figure 181.



Figure 181. Product page for a customer, who is logged to Facebook, and his or her friends have already performed some action with the app

# 12 Promotions

This chapter describes a variety of ways to promote your products.

## 12.1 Overview

Magento CE features a variety of ways to promote your products. These include options for presenting additional products in order to increase conversion rates and for providing various discounts and promotions. The possibilities are endless!

## 12.2 Up-selling, Related Products, and Cross-selling

Three types of product promotion selling options are provided in Magento CE: Up-sell products, Related products, and Cross-sell products.

- ❖ **Up-sell Products:** When a customer views a product, the Up-sells for this product are items that your customer could buy *instead* of the product that is being viewed. These products may be of a better quality, more expensive, or more popular, or produce a higher profit margin. These products appear on the Product Information page.
- ❖ **Related Products:** Related products appear in the Product Information page in the right column. Related products are meant to be purchased in addition to the item the customer is viewing.
- ❖ **Cross-sell Products:** Products that are promoted in the shopping cart page right before checkout. When a customer navigates to the shopping cart (whether automatically after adding a product or otherwise), these products are offered as suggestions in addition to the products already in the shopping cart. They are similar to impulse buys, like magazines and candy at the cash registers in grocery stores.

## Up-Sells

The up-sell products appear in the Product Information page under the **Product Description**, as shown in Figure 182. This example presents a more expensive keyboard and other products as up-sells to the less expensive keyboard.

**Microsoft Natural Ergonomic Keyboard 4000**  
[Be the first to review this product](#)

Availability: In stock.

**\$99.99**

Qty:  **Add to Cart** OR [Add to Wishlist](#)  
[Add to Compare](#)

**Quick Overview**  
The most comfortable ergonomic keyboard on the market!  
We just made a great deal for this Microsoft Natural ergonomic keyboard.

Double click on above image to view full picture

—  —

**Product Description**

The most comfortable ergonomic keyboard on the market! We just made a great deal for this Microsoft Natural ergonomic keyboard. And we know you're going to love it. This newest addition to the world's best selling line of ergonomic keyboards features a natural wrist alignment that will make your day! Just one touch allows you to perform a wealth of common but important tasks such as opening documents and replying to e-mail. The Microsoft Natural Model 4000 ergonomic keyboard also features an improved number pad with easy-to-reach symbols such left and right, equal sign and back space placed just above the number pad. Easy-access to the Internet. Multimedia keys. Lockable F keys and much more (see complete list of additional features below). Don't you think it's time to go natural? Microsoft's Natural Ergonomic Model 4000 Keyboard. Available right here, for the best price!

**You may also be interested in the following product(s)**

 <b><a href="#">Logitech diNovo Edge Keyboard</a></b> \$239.99	 <b><a href="#">Computer</a></b> From: \$447.98 To: \$4,477.92	 <b><a href="#">Gaming Computer</a></b> From: \$4,999.95 To: \$6,348.95
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Figure 182. Up-Sell Products

To add Up-sells to a product:

1. In the Admin Panel select **Catalog > Manage Products** to display a list of products, as shown in Figure 183.

**Manage Products** [Add Product](#)

Choose Store View: All Store Views

Page 1 of 7 pages | View 20 per page | Total 122 records found | [Notify Low Stock RSS](#) [Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions ▼ [Submit](#)

ID	Name	Type	Attrib. Set Name	SKU	Price	Qty	Visibility	Status	Websites
<input type="checkbox"/>	168 shirt 2	Simple Product	Default	1234shirt2	\$ 10.00	20	Catalog, Search	Enabled	Main Website
<input type="checkbox"/>	167 shirt 1	Simple Product	Default	1234shirt	\$ 10.00	10	Catalog, Search	Enabled	Main Website
<input type="checkbox"/>	166 HTC Touch Diamond	Simple Product	Cell Phones	HTC Touch Diamond	\$ 750.00	999997	Catalog, Search	Enabled	Main Website
<input type="checkbox"/>	165 My Computer	Bundle Product	Computer	mycomputer		999998	Catalog, Search	Enabled	Main Website
<input type="checkbox"/>	164 Gaming Computer	Bundle Product	Default	computer_fixed	\$ 4,999.95	999995	Catalog, Search	Enabled	Main Website
<input type="checkbox"/>	163 Computer	Bundle Product	Default	computer		999995	Catalog, Search	Enabled	Main Website
<input type="checkbox"/>	162 Microsoft Wireless Optical	Simple Product	Default	micronmouse5000	\$ 59.99	999999	Catalog, Search	Enabled	Main Website

Figure 183. Manage Products Page

- Click the **Edit** link which appears on the right side of the row of the product for which you want to define Up-sells. The page shown in Figure 184 is displayed:

**shirt 2 (Default)** [Back](#) [Reset](#) [Delete](#) [Duplicate](#) [Save](#) [Save And Continue Edit](#)

Choose Store View: Default Values

**Product Information**

- General
- Prices
- Meta Information
- Images
- Description
- Design
- testgroup
- Inventory
- Websites
- Categories
- Related Products
- Up-sells
- Cross-sells
- Product Reviews
- Product Tags

**General** [Create New Attribute](#)

Name \*  [STORE VIEW]

SKU \*  [GLOBAL]

Weight \*  [GLOBAL]

Default Category  [GLOBAL]

Status \*  [WEBSITE]

Tax Class \*  [STORE VIEW]

URL key  [GLOBAL]

Visibility \*  [STORE VIEW]

Allow Gift Message  [GLOBAL]

Manufacturer  [GLOBAL]

Color  [GLOBAL]

Set Product as New from Date  [GLOBAL]

Figure 184. Edit Product Page

- Select the **Up-sells** tab in the panel on the left.

Western Digital 500GB HD - 7200RPM (Hard Drive)

Page 1 of 7 pages | View 20 per page | Total 122 records found

ID	Name	Type	Attrib. Set Name	Status	Visibility	SKU	Price
<input checked="" type="checkbox"/>	169	shirt 2	Simple Product	Default	Disabled	Catalog, Search	\$ 10.00
<input checked="" type="checkbox"/>	168	shirt 2	Simple Product	Default	Enabled	Catalog, Search	1234shirt2 \$ 10.00
<input type="checkbox"/>	167	shirt 1	Simple Product	Default	Enabled	Catalog, Search	1234shirt \$ 10.00
<input type="checkbox"/>	166	HTC Touch Diamond	Simple Product	Cell Phones	Enabled	Catalog, Search	HTC Touch Diamond \$ 750.00
<input type="checkbox"/>	165	My Computer	Bundle Product	Computer	Enabled	Catalog, Search	mycomputer
<input type="checkbox"/>	164	Gaming Computer	Bundle Product	Default	Enabled	Catalog, Search	computer_fixed \$ 4,999.95
<input type="checkbox"/>	163	Computer	Bundle Product	Default	Enabled	Catalog, Search	computer
<input type="checkbox"/>	162	Microsoft Wireless Optical Mouse 5000	Simple Product	Default	Enabled	Catalog, Search	micronmouse5000 \$ 59.99
<input type="checkbox"/>	161	Lenitech	Simple Product	Default	Enabled	Catalog, Search	lenitech \$ 220.00

Figure 185. Products Selected as Up-Sell Products

**Tip:** By default the list shows only products that were already selected as up-sells. If there are none or you want to add other products, click the **Reset Filter** button to display a list of all the products.

- Use the check box in each row or the products that you want to appear as up-sells to this product.
- Click the **Save** button.

## Related Products

Related Products are shown in the right column of your web store in a separate block. The example in Figure 186 shows a mouse product that was added as a Related Product for a keyboard purchase.

**RELATED PRODUCTS**

Check items to add to the cart or [select all](#)

 [Microsoft Wireless Optical Mouse 5000](#)  
**\$59.99**  
[Add to Wishlist](#)

Figure 186. Related Item

### To add Related Products to a product:

- In the Admin Panel, select **Catalog > Manage Products** to display a list of products.
- Click the **Edit** link that appears on the right side of the row of the product for which you want to define Related Products.

3. Select the **Related Products** tab in the panel on the left to display the Product Listing page.

**Tip:** By default the list shows only products that were already selected as Related Products. If there are none or you want to add other products, click the **Reset Filter** button to display a list of all the products.

4. Use the check box in each row of the products that you want to appear as Related Products to this product.
5. Click the **Save** button.

## Cross-sells

Cross-sell products are shown in a block below the shopping cart products, as shown in Figure 187.



Figure 187. Cross-Sell Item

Cross-sell products are displayed after a product has already been added to the shopping cart. By default, three products are randomly selected by Magento CE from the products that have been defined as Cross-sell products of all the products in the shopping cart.

### To add Cross-sell products to a product:

1. In the Admin Panel, select **Catalog > Manage Products** to display a list of products.
2. Click the **Edit** link that appears on the right side of the row of the product for which you want to define Related Products.
3. Select the **Cross Sells** tab in the panel on the left to display the Product Listing page.

**Tip:** By default the list shows only products already selected as cross-sells. If there are none, or you want to add other products, click the **Reset Filter** button to display a list of all the products.

4. Use the check box in each row of the products that you want to appear as Cross-sells for this product.
5. Click the **Save** button.

## 12.3 Catalog and Shopping Cart Price Rules

There are two types of price rules in Magento CE: **Catalog Price Rules** and **Shopping Cart Price Rules**. Catalog Price Rules are applied to products before they are added to the shopping cart. Shopping Cart Price Rules are applied to products in the shopping cart.

### Catalog Price Rules

**Catalog Price Rules** are applied to products before they are added to a shopping cart. They can be used to create sales and discounts that do not require that a discount code be supplied by the customer. The process of defining a **Catalog Price Rule** consists of three stages:

- **Defining the Catalog Price Rule Information**, page 186, defines general information about the rule.
- **Defining the Catalog Price Rule Conditions**, page 188, defines the conditions that trigger the rule.
- **Defining the Catalog Price Rule Actions**, page 190, defines the actions that are executed when the conditions of this rule are met.

### Defining the Catalog Price Rule Information

To create a Catalog Price Rule:

1. From the Admin Panel, select **Promotions > Catalog Price Rules > Add New Rule** button to display the page shown in Figure 188.

General Information	
Rule Name *	<input type="text" value="Summer Sale"/>
Description	<input type="text" value="Summer T-shirt Sale - 10% off"/>
Status *	<input type="text" value="Active"/>
Websites *	<input type="text" value="Main Website"/>
Customer Groups *	<input type="text" value="NOT LOGGED IN"/> <input type="text" value="General"/> <input type="text" value="Wholesale"/> <input type="text" value="Retailer"/>
From Date	<input type="text" value="07/1/09"/>
To Date	<input type="text" value="08/31/09"/>
Priority	<input type="text"/>

Figure 188. Adding a New Catalog Price Rule

2. In the **Rule Name** and the **Description** fields, specify a unique name and a description for this Catalog Price Rule.
3. In the **Status** field, select **Active**.
4. In the **Websites** field, select the website to which this rule applies.
5. In the **Customer Groups** field, select one or more customer groups to which this rule applies.
6. In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

**Advanced Tip:** You can use the **Priority** field (1 is the highest priority) when there are multiple rules. This determines which rule takes effect when more than one **Catalog Price Rule** applies.

## Defining the Catalog Price Rule Conditions

After you have set up the general information for the price rule, you must create the conditions that specify when the rule is triggered.

The following example shows how to discount every T-shirt that is over \$20 by 10% by defining a rule that has two conditions.

### To define Catalog Price Rule Conditions:

1. Select the **Conditions** option in the panel on the left to display the page shown in Figure 189.



Figure 189. Specifying Rule Conditions

2. The first rule appears by default: **If ALL these Conditions are TRUE**. It specifies whether the rules that you define must **all** be met or if **any** of them can be met (AND or OR) in order to trigger the rule's action. In our example, we wanted the discount to take effect when the product is a T-shirt **and** when the T-shirt costs over \$20. Therefore, leave the word **ALL** in the page above.
3. Click on the  icon to display a selection field and select the **SKU** option under **Product Attributes** from the dropdown menu. The page changes as shown in Figure 190.



Figure 190. Adding a SKU Condition

4. Click on the **is** link to display the comparison operator drop-down list shown in Figure 191.



Figure 191. Comparison Operator Drop-down list

5. Select the **is one of** comparison operator.

- Click on the three dots to the right of the words **is one of** to display the value field, as shown in Figure 192.



Figure 192. Value Field

- Click on the **Chooser** icon  to display a list of products from which you can select, as shown in Figure 193.

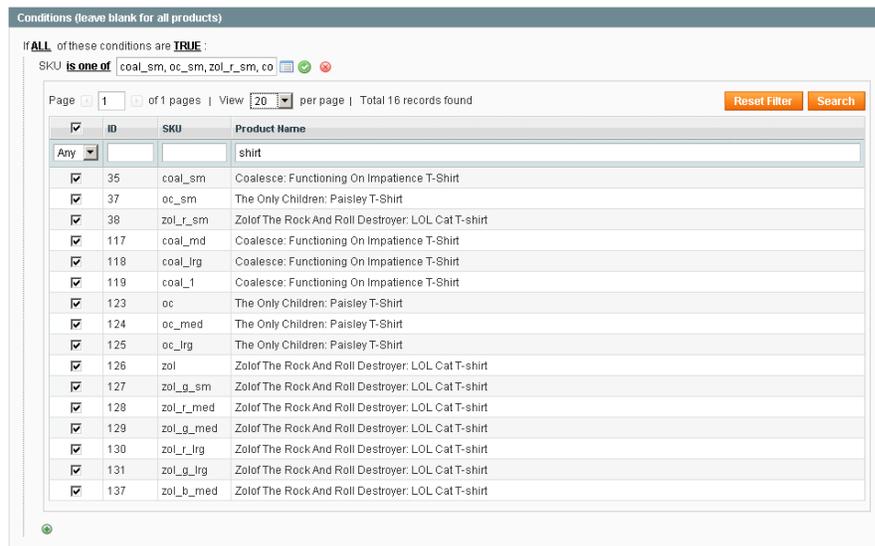


Figure 193. Item Selection

The page above shows the list of products filtered to show only those that have the word **Shirt** in their name.

- Select the check boxes of the products (T-shirts in this example) to which this rule is to apply.
- Save this selection of products by clicking the **Apply** icon .
- Now this rule specifies that it applies to T-shirts. You must now add the Condition that the product must cost over \$20 in order for the rule to apply. To do so, click on the  icon to display a selection field and select the **Price** option under **Product Attributes** from the drop-down list.
- Click on the **is** link and select **equals or greater than** from the comparison operator drop-down list.
- Enter the value 20.00 in the value field on the right to create the second Condition, as shown in Figure 194.

Figure 194. Two Conditions Specified

## Defining the Catalog Price Rule Actions

Now that the conditions have been defined that trigger this rule, we must define the actions to be taken when the conditions are met. The following defines that the price is discounted by 10%.

### To define Catalog Price Rule Actions:

1. Select the **Actions** option in the panel on the left to display the page shown in Figure 195.

Figure 195. Specifying Actions

2. The **Apply** drop-down list enables you to define whether the discount that is specified in the **Discount amount** field is a percentage or a fixed amount of the price of this product. It also enables you to define whether the discount amount is subtracted from the original price (**By**) or whether the **Discount amount** field actually defines the final price (**To**). For our example, in the **Apply** field, select **By Percentage of the original price**.
3. In the **Discount Amount** field, specify the value **10.00**. This specification defines a final price that is a 10% reduction of the original price.

**Note:** Mistakenly selecting the **To Percentage of the original price** option would give a final price that is equal to 10% of the original price, meaning a 90% reduction.

4. Select the **Save Rule** button to create the rule.
5. You must also select either the **Save and Apply** or the **Apply Rules** button to immediately apply this discount to the selected products.

**Note:** As you add new rules, the system must recalculate the prices and the priorities of the rules. Generally, system rules are automatically processed and applied each night. In order to apply a new rule immediately, you must select one of the **Apply** buttons.

## Shopping Cart Price Rules

Shopping Cart Price Rules, as the name implies, are applied when a customer reaches the shopping cart. They can be applied either with or without the customer entering a coupon code, and include features not found in traditional coupon tools. This example defines a simple 10% discount coupon to be used for clogs when the shopping cart subtotal is over \$100.

The process of defining a **Cart Price Rule** consists of three stages:

- ❖ **Defining the Cart Price Rule Information**, page 191, defines general information about this rule.
- ❖ **Defining the Cart Price Rule Conditions**, page 193, defines the conditions that trigger the rule.
- ❖ **Defining the Cart Price Rule Actions**, page 193, defines the actions that are executed when the conditions of this rule are met.

### Defining the Cart Price Rule Information

To create a Cart Price Rule:

1. In the Admin Panel, select **Promotions > Cart Price Rules > Add New Rule** button to display the page shown in Figure 196.

General Information	
Rule Name *	<input type="text"/>
Description	<input type="text"/>
Status *	Active <input type="button" value="v"/>
Websites *	Main Website Test Site
Customer Groups *	NOT LOGGED IN General Wholesale Retailer
Coupon *	No Coupon <input type="button" value="v"/>
Uses per Customer	<input type="text"/>
From Date	<input type="text"/> <input type="button" value="calendar"/>
To Date	<input type="text"/> <input type="button" value="calendar"/>
Priority	<input type="text"/>
Public In RSS Feed	Yes <input type="button" value="v"/>

Figure 196. Adding a New Shopping Cart Price Rule

1. In the **Rule Name** field and the **Description** field, specify a unique name and a description for this Shopping Cart Price Rule.
2. In the **Status** field, select **Active**.
3. In the **Website** field, select the website to which this coupon applies.
4. To specify that this rule only applies when a coupon code is used, select **Specific Coupon** in the **Coupon** drop-down list, and specify the code of the coupon that the customer must specify in the web store.
5. To specify that each customer can use this coupon only once, specify **1** in the **Uses Per Customer** field.

**Tip:** If you want to create a limited offer, the coupon can be limited to be used a certain number of times by selecting **Specific Coupon** in the **Coupon** drop-down list and specifying that number the **Uses per coupon** field.

6. In the **From Date** and **To Date** fields, set a date range for the rule to take effect. If you leave the date range empty, then the rule is enabled as soon as it is created.

**Advanced Tip:** You can use the **Priority** field (1 is the highest priority) when there are multiple rules. It determines which rule takes effect first when more than one Cart Price Rule applies.

- By default, an announcement of this shopping cart price rule is included in your store's RSS feed. To suppress this announcement, select **No** in the **Public in RSS Feed** drop-down list.

## Defining the Cart Price Rule Conditions

After you have set up the general information for the price rule, you create the Conditions that specify when the rule is triggered. The following example shows how to create a rule that has one condition, which checks when the shopping cart subtotal is over \$100.

### To define Catalog Price Rule Conditions:

Select the **Conditions** option in the panel on the left and define a rule with the single condition "Subtotal equals or greater than 100," as shown in Figure 197.

Apply the rule only if the following conditions are met (leave blank for all products)

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

Subtotal **equals or greater than** **100** ❌

+

Figure 197. Shopping Cart Price Rule Condition

## Defining the Cart Price Rule Actions

Now that the condition has been defined that triggers this rule, you must define the actions to be taken. The following defines that 10% is reduced from the product's original price.

### To define Cart Price Rule Actions:

- Select the **Actions** option in the panel on the left to display the page shown in Figure 198.

Update prices using the following information

Apply	Percent of product price discount
Discount amount *	10
Maximum Qty Discount is Applied to	0
Discount Qty Step (Buy X)	
Free shipping	No
Stop further rules processing	No

Figure 198. Specifying Shopping Cart Price Rule Actions

- The **Action** tab has two important sections. The first one controls the discount. In the **Apply** field, select **Percent of product price discount**.
- In the **Discount amount** field, specify **10** to indicate that 10% is reduced from the product's original price.

**Tip:** Other options, not related to this example, are available, such as: **Fixed amount discount**, **Fixed amount discount for whole shopping cart**, and **Buy X get Y free**.

- In the **Maximum Qty Discount is Applied to** field, specify the maximum quantity of products to which this discount can be applied. If you enter **5** in this field, then the first five products of this type purchased in the same shopping cart get the 10% discount and the sixth product of the same type does not get the discount.
- In the **Discount Qty Step (Buy X)** field, specify how often the discount is applied. This field is not relevant to our example, so leave this field empty. If you enter **8** here, then a 10% discount is applied to all the products after the eighth product is added to the shopping cart. If more than eight items are added to the shopping cart, the ninth through 15th products do not get the discount until the 16th product is added to the shopping cart, at which point the discount is 10% for all 16 products. This discount continues for every factor of eight.
- In the **Free Shipping** field, specify whether to combine the coupon amount with a free shipping offer, for only the products for which the coupon is valid or for the entire Order, when one of these products is in the shopping cart. This field is not relevant to our example, so leave the **No** value in this field.
- After defining the coupon as described above, select the products for which the coupon is valid. In our example, the coupon discount applies to clogs. Define a condition that applies to the SKU of clogs, as shown in Figure 199.

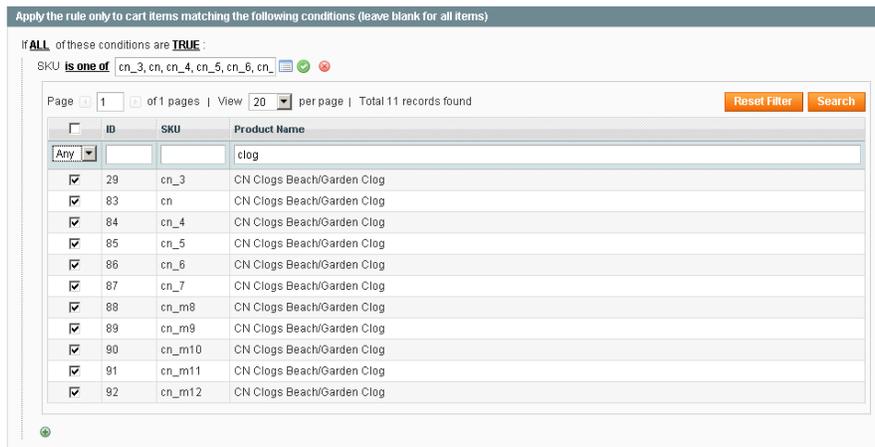


Figure 199. Specifying Products to Apply the Discount To

- Click the **Save Rule** button.

## Example: Defining a Buy 2 Get 1 Free Promotion

This section describes how to create another discount coupon with a **Buy 2 get 1 free** promotion. In this example, the web store is trying to push a digital camera as a family deal. This is a Shopping Cart Price rule.

To define a Buy 2 get 1 free promotion:

1. Define the **Coupon Information**, as described in “Shopping Cart Price Rules,” page 191, but leave the **Coupon** drop-down list selected to **No Coupon**. This selection specifies that the discount takes effect as soon as a customer adds the products to the shopping cart.

The screenshot shows the configuration interface for a Buy X get Y Free Promotion. It is divided into two main sections:

- Update prices using the following information:**
  - Apply:** Buy X get Y free (discount amount is Y)
  - Discount amount \*:** 1
  - Maximum Qty Discount is Applied to:** 0
  - Discount Qty Step (Buy X):** 2
  - Free shipping:** No
  - Stop further rules processing:** No
- Apply the rule only to cart items matching the following conditions (leave blank for all items):**
  - If **ALL** of these conditions are **TRUE**:
    - SKU is **QC-2185**

Figure 200. Buy X get Y Free Promotion

2. Do not define any conditions, because this rule is always applied to the Digital Camera. The deal is created for the Argus QC-2185 Quick Click 5MP Digital Camera available in the Magento Sample Data.
3. Click the **Actions** tab in the left navigation bar. In the **Apply** field, select the **Buy X get Y free** option.
4. In the **Discount Amount** field, specify **1**. This is the number of units that are offered free.
5. In the **Discount Qty Step** field, specify **2**. This is the number of units that must be purchased in order to receive the free unit.
6. In the bottom section, set up the condition to specify the SKU of the item that is featured in this promotion
7. Click the **Save Rule** button.

You can now send out your marketing message telling customers that if they buy 3 Argus QC-2185 Quick Click 5MP Digital Cameras one of them will be free.

**Tip:** It is good practice to test the effect of these rules yourself before trying them out on the public. Either use a discount code that only you know or assign your test customer to a testing customer group and limit the cart rules to only that customer group.

## 12.4 Auto-Generating Coupon Codes

For shopping cart price rules, you can auto-generate batches of coupon codes and track their usage.

### Auto-Generating Coupon Codes Quick Reference

Batches of discount coupon codes can be generated and managed on the **Manage Coupon Codes** tab of the Shopping Cart Price Rule page (**Promotions > Shopping Cart Price Rules > %your rule%**). To make the tab appear, in the **Coupon** field select **Specific Coupon**, select the **Use Auto Generation** check box, and click **Save and Continue Edit**. See Figure 201.

The screenshot shows the 'Shopping Cart Price Rule' page for a rule named 'Sashuk'. The page has a navigation bar with tabs: Dashboard, Sales, Catalog, Mobile, Customers, Promotions (active), Newsletter, CMS, Reports, System, and a 'Get help for this page' link. Below the navigation bar is a toolbar with buttons: Back, Reset, Delete Rule, Save Rule, and Save and Continue Edit (highlighted with a red circle). The main content area is divided into two sections: 'Rule Information' on the left and 'General Information' on the right. The 'Rule Information' section has a sidebar with links: Conditions, Actions, Labels, and Related Banners. The 'General Information' section contains several fields: Rule Name (Sashuk), Description (empty), Status (Active), Websites (Main Website, Lenchik Website, Sasha's website, krystyna\_website), Customer Groups (NOT LOGGED IN, General, Wholesale, Retailer), Coupon (Specific Coupon), and Coupon Code (empty). The 'Use Auto Generation' checkbox is checked, and a red box highlights the 'Coupon' field, the 'Use Auto Generation' checkbox, and its associated text: '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.'

Figure 201. The Shopping Cart Price Rule page. Enabling the auto-generation of coupon codes.

The default settings for the format of auto-generated coupon codes are configured under **System > Configuration > Promotions > Auto Generated Specific Coupon Codes**.

For detailed description of the auto-generation of coupon codes, see Auto-Generating, Exporting, and Managing Coupon Codes, page 197.

## Configuring Coupon Codes Auto-Generation Settings

You can set the default requirements for the coupon code format under **System > Configuration > Promotions > Auto Generated Specific Coupon Codes**. The following settings are available for configuring:

- ❖ **Code Length:** Defines a coupon code length excluding prefix, suffix and separators.
- ❖ **Code Format:** Defines a coupon code format. The options are: **Alphanumeric** (a combination of letters and numbers), **Alphabetical** (letters only), **Numeric** (numbers only).
- ❖ **Code Prefix:** Defines a value that will be appended to the beginning of all the coupon codes. If you do not want to use a prefix, leave this field blank.
- ❖ **Code Suffix:** Defines a value that will be appended to the end of all codes. If you do not want to use a suffix, leave this field blank.
- ❖ **Dash Every X Characters:** Defines the interval at which a dash (-) will be inserted in all coupon codes. If you do not want to use a dash, leave this field blank.

**Note:** Coupons whose codes differ only by dash character(s) are considered to be different coupons.

These settings can be overridden each time you need to generate a batch of coupons on the Shopping Cart Price Rule page.

## Auto-Generating, Exporting, and Managing Coupon Codes

To generate and export a batch of coupon codes:

1. Log in to the Magento Admin Panel.
2. Navigate to **Promotions > Shopping Cart Price Rules**.
3. Select an existing rule or create a new one.
4. In the **Coupon** field select **Specific Coupon**.
5. Select the **Use Auto Generation** check box. Perform other rule configurations, if necessary.

**Important Note:** Shopping cart price rules with auto-generated coupon codes cannot be used in automated email reminders. If the shopping cart price rule for which you set **Specific Coupon** in the **Coupon** field has been used in an automated email reminder rule, it will be automatically unassigned after saving the rule.

6. Click **Save and Continue Editing**. The **Manage Coupon Codes** tab appears. See Figure 202.
7. On the **Manage Coupon Codes** tab, specify the quantity of codes to be generated in the **Coupon Qty** field, correct the code format settings (if necessary) and click **Generate**. The generated coupon codes appear in the grid. For each coupon, you can see whether it has been used and how many times. To delete the coupon codes, select the check boxes in the first column, select **Delete** from the **Actions** drop-down menu, and click **Submit**.
8. To export the codes, filter the list of codes so that only the desired codes are displayed, choose the file extension in the **Export to** field, click **Export**, and save the file.

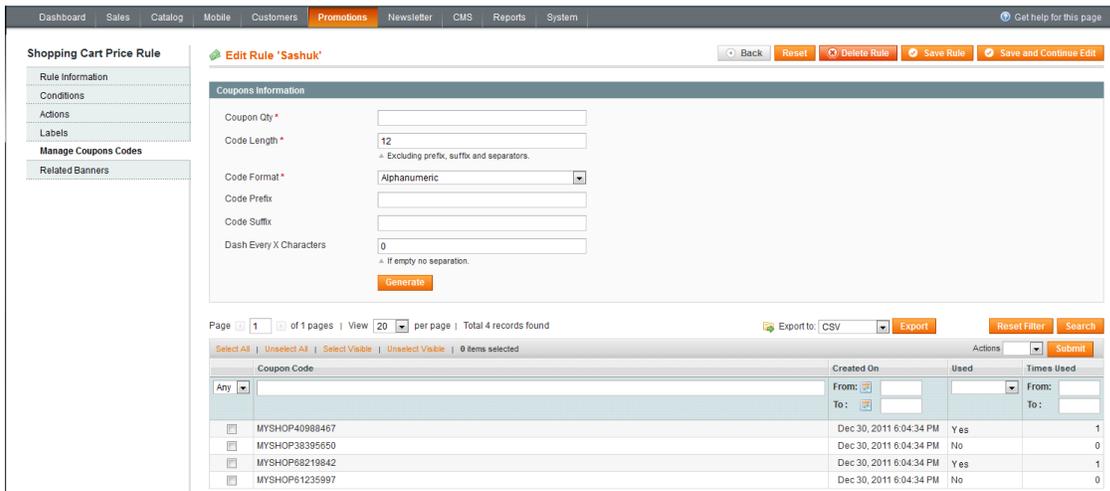


Figure 202. The Shopping Cart Price Rule page. Generating and managing coupon codes.

## Tracking the Usage of Coupon Codes

Information about how often each coupon was used is displayed in the grid on the **Manage Coupon Codes** tab of the Shopping Cart Price Rule page. See Figure 202 above for illustration of the grid. You can also create detailed report about coupon usage in orders.

To create a report about the usage of coupons generated for a specific shopping cart price rule:

1. Navigate to **Reports > Sales > Coupons**. The **Coupons Usage Report** page opens.
2. In the **Show Report For** field select the scope, configure report filters. In the **Shopping Cart Price Rule** field select **Specified** and select the desired rule(s).
3. Click **Show Report** in the upper right corner of the page.

## 12.5 Special Prices

Special prices enable you to define a discounted price for a product for a specified period of time.

### To define Special Price:

1. In the Admin Panel, select **Catalog > Manage Products** to display the list of products.
2. Click the **Edit** link on the right side of the relevant product's row.
3. Click the **Prices** tab in the left navigation panel.

Figure 203. Prices Options

4. In the **Special Price** field, enter the special price.
5. Optionally, set **Special Price From / To Date**. If you leave these fields blank, the special price is applied immediately and applies until removed on the same page.
6. Click **Save**.

The special price is shown on the frontend as shown in Figure 204.



**Microsoft Wireless  
Optical Mouse 5000**

Regular Price: ~~\$59.99~~

**Special Price: \$49.99**

**Add to Cart**

[Add to Wishlist](#)

[Add to Compare](#)

Figure 204. **Special Price – Frontend**

## 12.6 Tier Pricing

Tier Pricing is a promotional tool that enables a web store owner to price products differently when higher quantities are purchased. This is an effective way to move more merchandise and appeal to customers who buy more than one product at a time. When a customer adds a certain quantity of a product to their shopping cart, the price is automatically changed to reflect the discount.

### To define Tier Pricing:

1. In the Admin Panel, select **Catalog > Manage Products** to display the list of products.
2. Click the **Edit** link on the right side of the relevant product's row.
3. Click the **Prices** tab in the left navigation panel.
4. Add tiers by clicking the **Add Tier** button. You can create as many tiers as you need.

Prices + Create New Attribute

Price \*  [GLOBAL]  
[USD]

Cost  [GLOBAL]  
[USD]

Tier Price

Website	Customer Group	Qty	Price	Action
All Websites [USD]	ALL GROUPS	5 and above	89.99	
All Websites [USD]	ALL GROUPS	10 and above	69.99	

+ Add Tier

Special Price  [GLOBAL]  
[USD]

Special Price From Date  [GLOBAL]

Special Price To Date  [GLOBAL]

Not available for purchase with Google Checkout  [GLOBAL]

Figure 205. Specifying Price Tiers

5. Click **Save**.

**Tip:** 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 in each.

The prices on the frontend 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.

After saving the product, it shows the Tier Pricing block on the frontend.

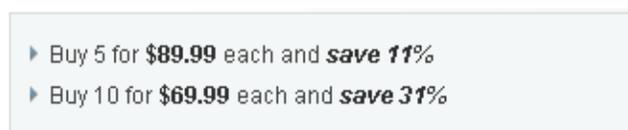


Figure 206. Tier Pricing Block- Frontend

On the product listing pages, the best available deal is displayed below the regular price, as shown in Figure 207.



Figure 207. "As Low As" Indication

## 12.7 Minimum Advertised Price

This section describes how a Minimum Advertised Price (MAP) policy can be applied in Magento CE.

### Minimum Advertised Price – General Concept

If you have a minimum advertised price in the agreement with a manufacturer, you can still sell the merchandise at lower price, though this price will be hidden. It will not be visible to customers on the product page and will not be indexed by search engines. As a result, a price below the minimum advertised will not appear in any catalog of products collected from multiple web stores. The "crossed-out" price, which can be displayed on catalog and product pages, will be the manufacturer's suggested retail price (MSRP). For storing the MSRP value, a new system attribute was added to the default attribute set.

An individual setting enables you to specify how the actual price is shown to customers: on clicking the **Check for price** link on a catalog or product page, when a product is added to the shopping cart, or before the order confirmation.

The MAP functionality can be applied to all product types except gift card products, and bundle products with dynamic pricing.

The MAP functionality only influences the way products prices are displayed on the frontend.

The following terminology is used in reference to this feature:

- ❖ **Actual Price:** The price that is specified in the Price of Special Price field on the product view page.
- ❖ **Manufacturer's Suggested Retail Price (MSRP):** The retail price as suggested by the manufacturer. The Actual Price is typically lower than MSRP.

## Minimum Advertised Price – a Quick View

MAP can be enabled and configured under **System > Configuration > Sales > Minimum Advertised Price**. See Figure 208.

Minimum Advertised Price	
Enable MAP	No [WEBSITE]
Apply MAP (Default Value)	No [WEBSITE] <small>▲ Warning: Applying MAP by default will hide all product prices on the frontend.</small>
Display Actual Price	In Cart [WEBSITE]
Default Popup Text Message	[STORE VIEW] 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. <b>&lt;br&gt;</b> You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.
Default "What's This" Text Message	[STORE VIEW] 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. <b>&lt;br&gt;</b> You have no obligation to purchase the product once you know the price. You can simply remove the item from your cart.

Figure 208. MAP global settings

After MAP is enabled, the configuration on the product level becomes available with the **Apply MAP**, **Display Actual Price**, and **Manufacturer's Suggested Retail Price** fields. See Figure 209.

Figure 209. MAP settings on product level

When MAP is applied globally, all prices on the frontend are hidden; the **Click for price** links appear instead. If you specify the Manufacturer’s Suggested Retail Price (MSRP), it will appear crossed-out. See Figure 210.



Figure 210. MAP is applied for the “Cuddle bear toy” and “Teddy bear toy” products. For the “Teddy bear toy,” the MSRP is specified, and it appears crossed out.

The way the actual price is displayed depends on the **Display Actual Price** setting. The following options are available:

- ❖ **On Gesture** (default value) - Clicking the **Click for price** link opens a pop-up window, containing the actual price and the information message. The actual price is shown on the last steps of the ordering process as well. See Figure 211.

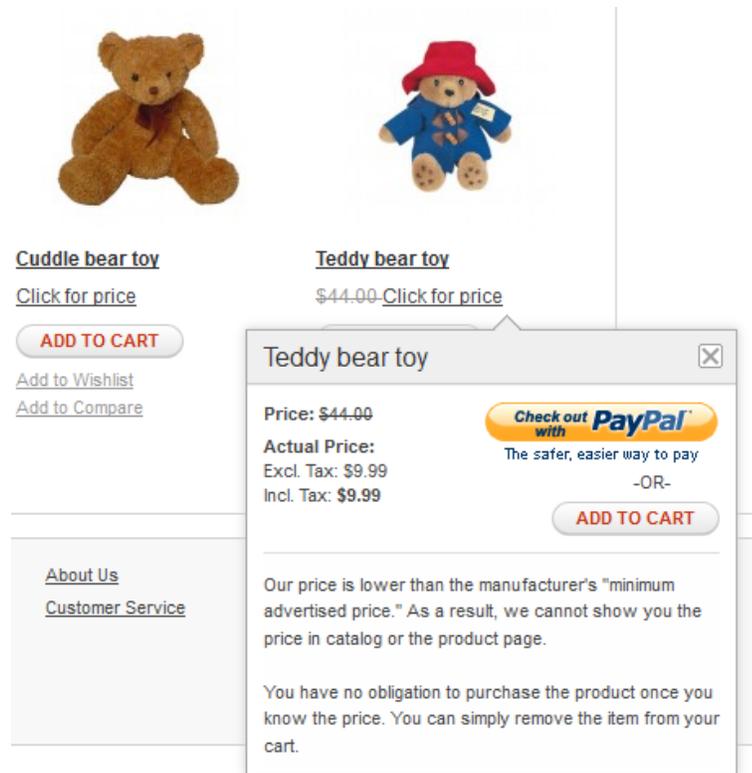


Figure 211. For the “Teddy bear toy” the Display Actual Price is set to “On Gesture.”

- ❖ **In Cart** - Clicking the **Click for price** link in a catalog redirects to the product page, where instead of the price or next to the crossed-out MSRP the following message is displayed: “To see product price, add this item to your cart. You can always remove it later.” The **What’s this** link is also included, which points to further explanations. The actual price of the product is displayed after it is added to the shopping cart. See Figure 212.



Figure 212. Product page on the frontend. Display Actual Price of the product is set to “In Cart.”

- ❖ **Before Order Confirmation** - Clicking the **Click for price** link in a catalog redirects to the product page, where the following message is displayed instead of the price or next to the crossed-out MSRP: “See price before order confirmation.” The **What’s this** link points to further explanations. The actual price and totals are displayed on the Order Review step of the one-page checkout, or on the order review pages of the Google checkout or PayPal checkout. See Figure 213.



Figure 213. Product page on the frontend. Display Actual Price of the product is set to “In Cart.”

For products that allow configuration on the frontend, and whose prices depend on the variant selected (the variants themselves can actually be either custom options or simple products with their own SKUs and stock management), the following logic is implemented if MAP is applied:

- ❖ MAP is applied to the main price; prices of the options, bundle items, and associated products (which add or subtract from the main price) are displayed normally.
- ❖ If a product does not have a main price, and its price is derived from the associated products' prices (such as in a grouped product), the MAP settings of the associated products are applied. Note that the MAP feature is not supported for bundled products with dynamic pricing.

Regarding other price settings, the MAP application logic is the following:

- ❖ If tier pricing is set, the tier price is displayed 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 Panel, only the actual price appears.

## Setting Up MAP

MAP functionality can be configured at both the global and product levels.

On the global level, you can enable/disable the functionality, apply it to all products, define how the actual price is displayed, and edit the text of the MAP related messages and information tips on the frontend.

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 ones.

## Setting up MAP on the global level

By default the MAP functionality is disabled globally.

### To enable and configure MAP:

1. In the Magento Admin Panel, select **System**, and click **Configuration**.
2. In the **Current Configuration Scope** in the upper left corner of the page, select the desired website.
3. In the left column under SALES, click **Sales**.
4. On the **Minimum Advertised Price** field set configure the following settings:

Option	Description	Scope
Enable MAP	Select <b>Yes</b> to enable the MAP.	Website
Apply MAP (Default Value)	<p>Applies MAP to all catalog products.</p> <p>If set to <b>Yes</b>, all prices in the catalog on the frontend are substituted with the <b>Click for price</b> links. On product pages, the prices are either substituted with the <b>Click for price</b> links or with the information about how to see prices, depending on the <b>Display Actual Price</b> setting.</p>	Website
Display Actual Price	<p>Defines how the actual price is displayed on the frontend. Select from the following:</p> <ul style="list-style-type: none"> <li>• <b>On Gesture</b> - Clicking the <b>Click for price</b> link opens a pop-up window, containing the actual price. On all other stages of the ordering process (in the shopping cart, on the order review) the actual price is displayed normally.</li> <li>• <b>In Cart</b> - Clicking the <b>Click for price</b> link in a catalog redirects to the product page. On the product page, the price is replaced with the following message: "To see price, add this item to your cart. You can always remove it later ". The <b>What's this</b> link points to an information tip. The text of the information tip can be edited in the <b>Default "What's This" Text Message</b> field.</li> </ul> <p>The actual price is shown when customer adds the product to the shopping cart. It is also shown during the checkout as usual.</p> <ul style="list-style-type: none"> <li>• <b>Before Order Confirmation</b> - Clicking the <b>Click for price</b> link in a catalog redirects to the product page. On the product page the price is replaced with the following message: "See price before order confirmation." The <b>What's this</b> link points to the information tip.</li> </ul> <p>The actual price is displayed on the Order Review step of the one page checkout or on the order review pages of the Google checkout or PayPal checkout. In the shopping cart, neither the prices nor the subtotals are displayed.</p> <p>When there is at least one item in the shopping cart with <b>Display Actual Price</b> set to <b>Before Order Confirmation</b>, the order total is not shown in the cart. Instead, the message "Order total will be displayed before you submit the order " is shown.</p>	Website

Option	Description	Scope
	The option selected defines how product prices are displayed in wishlists and comparison lists as well	
Default Pop-up Text Message	The text field for editing the information message displayed if the <b>Display Actual Price</b> field is set to <b>On Gesture</b> .	Store view
Default "What's This" Text Message	The text field for editing the text of the <b>What's this</b> information tip.	Store view

- To save the configuration, click the **Save Config** button in the upper-right corner of the page.

## Setting Up MAP on the Product Level

MAP settings on the product level become available once the MAP functionality is enabled.

For gift cards and bundle products with dynamic pricing, the MAP settings are not available.

To configure MAP settings on a product level:

- Select **Catalog** and click **Manage Products**.
- Open the product for editing.
- On the **Prices** tab, the following MAP settings are available:

Option	Description
Apply MAP	Defines whether MAP is applied to the product.
Display Actual Price	Defines how the actual price of the product is displayed on the frontend. The value here overrides the corresponding global setting.
Manufacturer's Suggested Retail Price	The price at which a manufacturer "suggests" to sell the product. If specified, it appears crossed-out on the catalog and product pages on the frontend.

- To save the settings click **Save** or **Save and Continue**.

**Note:** If a product added to the shopping cart has MSRP specified, it will not be displayed crossed-out in the mini shopping cart or in the shopping cart side block.

## How MAP Is Applied for Different Product Types

The following describes how MAP is applied for different product types.

Product type	MAP implementation
Simple, Virtual	The actual price is not shown on the catalog and product pages; it is displayed according to the <b>Display Actual Price</b> setting. The custom

Product type	MAP implementation
	options prices are displayed normally.
Grouped	Prices of the associated simple products are not shown on the catalog and product pages; they are displayed according to their <b>Display Actual Price</b> setting.
Configurable	The actual price is not shown on the catalog and product pages; it is displayed according to the <b>Display Actual Price</b> setting. The prices of the options are displayed normally.
Bundle with fixed price	The actual price is not shown in the catalog; it is displayed according to the <b>Display Actual Price</b> setting. The prices of the bundle items are displayed normally.
Downloadable	The actual price is not shown on the catalog and product pages; it is displayed according to the <b>Display Actual Price</b> setting. The prices of the links are displayed normally.

## How MAP Is Applied for Different Price Settings

The following describes how MAP is applied for different price settings.

Price setting	MAP implementation
Tier Price	<p>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.</p> <p>The tier price is shown according to the <b>Display Actual Price</b> setting.</p>
Special Price	If the Special price is specified, the special price is displayed according to the <b>Display Actual Price</b> setting.

## 12.8 Product Group Price

The Product Group Price feature enables you to set different product prices for different customer groups on the product level. The functionality is aimed at improving the admin user experience with setting promotional prices for customer groups.

### Terminology

- ❖ **Regular price:** The value of the *price* system product attribute (which by default corresponds to the **Price** field on the **Prices** tab of the Product Information page available under **Catalog > Manage Products > %desired product%**).

- ❖ **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.

**Note:** The *group\_price* attribute is a system product attribute which was added for storing the group price value.

## Setting a Group Price for a Product

To set a group price for a catalog product:

1. Log in to the Magento Admin Panel.
2. Navigate to **Catalog > Manage Products > %desired product%**. The Product Information page opens.
3. On the **Prices** tab in the **Group Price** field click **Add Group Price**.
4. Select the target customer group and specify the price for the selected group. The **Website** column defines the scope of the **Group Price** field.

**Note:** 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 whole bundle product is applied to these group prices.

5. To save your changes, click **Save** or **Save and Continue Edit**.

## Group Price Implementation Details

A group price can be specified for the following product types:

- ❖ Simple
- ❖ Configurable
- ❖ Virtual
- ❖ Bundle
- ❖ Downloadable

The list of product types for which a group price can be specified is defined in the settings of the *group\_price* product attribute. The settings are available under **Catalog > Attributes > Manage Attributes > group\_price**. The list of product types, for which the attribute is used, can be configured in the **Apply To** field.

**Note:** For the Grouped and Gift Card product types, the Group Price functionality will not be applied even if these product types are selected in the **Apply To** field of the *group\_price* attribute. In this case, for Grouped products, the Group Price field will not even be displayed on the Product Information page in the Admin Panel. For Gift Card products, the Group Price field will be displayed, but its value will not be considered by the system.

Displaying the group price in the frontend fits the general logic of price displaying in Magento. If besides the regular price, a product has promotional price(s), the lowest price value is displayed in the frontend. If a product custom option has price set as a percentage, than the lowest promotional price will be used as base for the calculation. The same logic is applied when the associated products (the options) of a configurable product have prices set as a percentage.

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.

Backend Price Settings	Price Displayed in the Frontend
Price = \$4 Special Price = \$5 Tier Price = \$3	For customers from the tier price group(s): \$ 4 As low as: \$3  For customers from other groups: \$4
Price = \$5 Special Price = \$3 Tier Price = \$4	For all customers: <del>Regular Price: \$5</del> Special Price: \$3
Price = \$5 Special Price = \$3 Tier Price = \$4 Price after a catalog price rule applied = \$2	For customers from the catalog price rule group: <del>Regular Price: \$5</del> Special Price: \$2  For customers from other groups: <del>Regular Price: \$5</del> Special Price: \$3
Price = \$5 Special Price = \$4 Group Price = \$3	For customers from the price group: <del>Regular Price: \$5</del> Special Price: \$3  For customers from other groups: <del>Regular Price: \$5</del> Special Price: \$4

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

## 12.9 Newsletters

Magento CE provides a Newsletter feature, which enables store administrators to send newsletters to customers who have registered to receive them.

The first step in creating newsletters is to configure the newsletter settings for your site.

### To configure newsletter settings on your site:

1. In the Admin Panel, select **System > Configuration** to display the configuration page.
2. In the **CUSTOMERS** area in the left navigation panel, select the **Newsletter** option and expand the **Subscription Options** area to display the page shown in Figure 214.

Subscription Options		
Success Email Template	Newsletter subscription success (Default Tem	[STORE VIEW]
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 T	[STORE VIEW]
Need to Confirm	No	[STORE VIEW]
Confirmation Email Sender	Customer Support	[STORE VIEW]
Allow Guest Subscription	Yes	[STORE VIEW]

Figure 214. Newsletter Subscription Options

3. In the **Need to Confirm** field, select **Yes** to specify that each customer that registers for a newsletter will receive an email asking them to confirm their registration. This technique is called double opt-in, meaning that customers confirm that they want to receive a newsletter twice. This method reduces the number of customers that consider your newsletter as spam.

## Newsletter Templates

Before sending a newsletter, create a newsletter template. You can create and save as many of these as required for any situation, whether it be an annual holiday newsletter or weekly product updates.

### To create a new newsletter template:

1. In the Admin Panel, select **Newsletter > Newsletter Templates** to display a page listing the previously defined 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 to display the New Newsletter Template page, as shown in Figure 214.

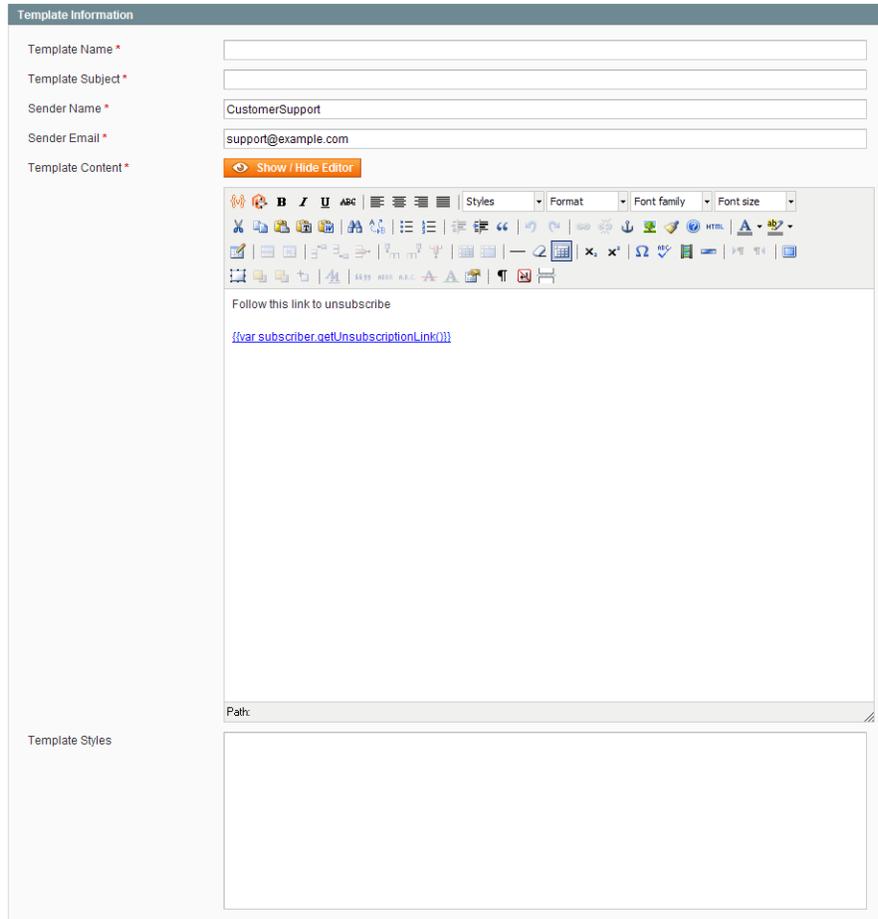


Figure 215. New Newsletter Template Page

3. In the **Template Name** field, specify a unique and indicative name for this template. This value is not visible for customers.
4. In the **Template Subject** field, specify the subject of the email to be sent to your customers.
5. 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.
6. In the **Template Content** field, use the WYSIWIG 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.
7. Click **Preview Template**, to display the content with the formatting as it will be viewed by your subscribers.
8. After you have finished editing the template, click the **Save Template** button to save it.

**Tip:** After you have saved a template, a **Save As** button appears when you edit this template. The **Save As** button enables you to duplicate the template, so that you can make changes and save the template as a new template without affecting the original template. 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 Queues

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 this queue, Magento CE sends the emails in packs.

### To send your newsletter using a queue:

1. In the Admin Panel, select **Newsletter > Newsletter Templates** to display a list of newsletter templates.
2. In the **Action** drop-down list for the relevant template, select the **Queue Newsletter** option.
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.

**Tip:** To ensure delivery of your newsletters, it is recommended that you integrate your Magento CE installation with a third-party newsletter provider. These services are “whitelisted” by email service providers. Look for newsletter providers in the Magento Connect website.

## Newsletter Reports

Three newsletter reports are provided in the **Newsletter** menu:

- ❖ **Newsletter Queue:** Shows the newsletter queues that have been defined and indicates their progress in sending emails.
- ❖ **Newsletter Subscribers:** Shows a list of customers that have subscribed to your newsletter. It also enables you to unsubscribe these customers manually.
- ❖ **Newsletter Problem Reports:** Shows a list of errors that have occurred while sending the email. This Report enables you to remove the incorrect emails from the subscribers list.



# 13 Managing Orders and Customers

This chapter describes how to manage customer records and how to add orders from the backend.

## 13.1 Managing Customers

### Viewing and Editing Customers

To view existing customers:

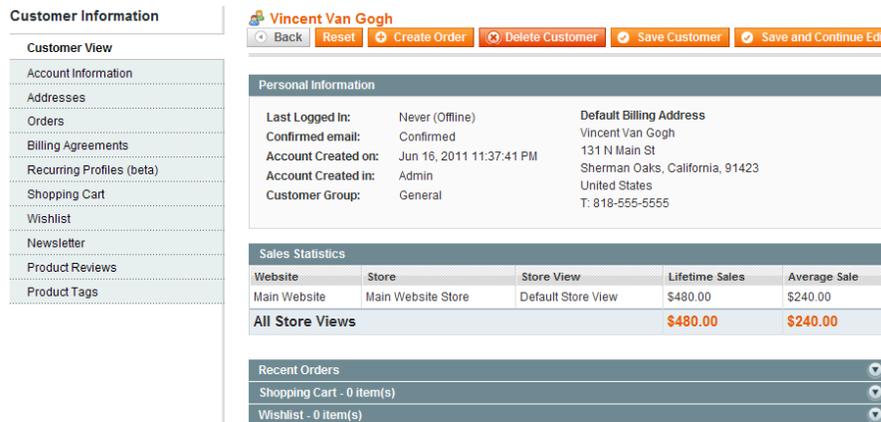
1. In the Admin Panel, select **Customers > Manage Customers** to display the Manage Customers page, as shown in Figure 216. The Manage Customers page contains a list of all the customers that opened accounts in your web store or were added using the **Add New Customer** feature.



ID	Name	Email	Group	Telephone	ZIP	Country	State/Province	Customer Since	Website	Action
2	Test Customer	test@testcompany.com	General	123-123-1234	90123	United States	California	Mar 23, 2009 12:13:12 AM	Main Website	Edit
1	John Doe	john.doe@example.com	General					Aug 30, 2007 11:23:13 PM	Main Website	Edit

Figure 216. Manage Customers Page

2. Click the **Edit** link on the right side of a customer’s row to display the customer information page, as shown in Figure 217.



**Customer Information**

**Vincent Van Gogh**

Back | Reset | Create Order | Delete Customer | Save Customer | Save and Continue Edit

**Personal Information**

Last Logged In:	Never (Offline)	Default Billing Address:	Vincent Van Gogh
Confirmed email:	Confirmed		131 N Main St
Account Created on:	Jun 16, 2011 11:37:41 PM		Sherman Oaks, California, 91423
Account Created in:	Admin		United States
Customer Group:	General		T: 818-555-5555

**Sales Statistics**

Website	Store	Store View	Lifetime Sales	Average Sale
Main Website	Main Website Store	Default Store View	\$480.00	\$240.00
<b>All Store Views</b>			<b>\$480.00</b>	<b>\$240.00</b>

**Recent Orders**

Shopping Cart - 0 item(s)

Wishlist - 0 item(s)

Figure 217. Customer Information Page

The tabs in the left panel provide a variety of types of information about the customer and for handling the relationship with a customer, such as: when the customer last logged in and out, addresses, ordering statistics, recent orders, current shopping cart contents, their last reviews, the newsletter to which they subscribed and so on.

## Adding a Customer

Customers typically register themselves in your web store using the **My Account** link in the header of each page. In addition, you can use the following procedure to add a customer using the backend.

To add a new customer:

1. In the Admin Panel, select **Customers > Manage Customers**.
2. Click the **Add New Customer** button to display the New Customer page, as shown in Figure 218.

The screenshot shows the 'New Customer' page in the Magento Admin Panel. The page title is 'New Customer' and the breadcrumb trail is 'Customers > Manage Customers'. At the top right, there are buttons for 'Back', 'Reset', 'Save Customer', and 'Save and Continue Edit'. The form is divided into two main sections: 'Account Information' and 'Password Management'. The 'Account Information' section includes fields for 'Associate to Website \*' (set to 'Admin'), 'Group \*' (set to 'General'), 'Prefix', 'First Name \*', 'Middle Name/Initial', 'Last Name \*', 'Suffix', 'Email \*', 'Date Of Birth' (with a calendar icon), 'Tax/VAT Number', 'Gender', 'Send Welcome Email' (checkbox), and 'Send From' (set to 'aaaaaaa'). The 'Password Management' section includes a 'Password \*' field and a checkbox for 'Send auto-generated password'.

Figure 218. New Customer Page

This page enables you to define basic identifying information about the customer and his/her various addresses. Many aspects of the information retained about a customer in Magento CE can be accessed by editing the customer's information, as described in "Viewing and Editing Customers," page 217.

3. The fields on this page are self-explanatory. Specify the customer's information and then click the **Save Customer** button.

## Managing Customer Groups

The customer group to which the customer belongs determines which discounts are given to this customer, as defined in the **Catalog Price Rules** and **Shopping Cart Price Rules** (described in the "Catalog and Shopping Cart Price Rules," page 185), and the tax rule that is applied to that customer.

To create and edit customer groups:

1. In the Admin Panel, select **Customers > Customer Groups** to open the Customer Groups page, as shown in Figure 219.

ID	Group Name	Tax Class
1	General	Retail Customer
0	NOT LOGGED IN	Retail Customer
3	Retailer	Retail Customer
2	Wholesale	Retail Customer

Figure 219. Customer Groups Page

2. Do one of the following:
  - ❖ To create a new customer group, click **Add New Customer Group**.
  - ❖ To edit an existing customer group, click the row for the desired group.

The customer group editing page opens, as shown in Figure 220.

Figure 220. New Customer Group Page

3. Specify a unique name for this customer group (or modify the existing name).
4. Select a tax class to associate with this group.
5. Click **Save Customer Group**.

## Checking Online Customers

You can check which customers are currently online and view their activity.

To view online customers:

In the Admin Panel, select **Customers > Online Customers** to display the Online Customers page, as shown in Figure 221.

ID	First Name	Last Name	Email	IP Address	Session Start Time	Last Activity	Type	Last Url
2	Test	Customer	test@testcompany.com	127.0.0.1	Mar 24, 2009 8:59:00 AM	Mar 24, 2009 9:57:13 AM	Customer	http://www.magentostore.com/index.php/customer/account/

Figure 221. Online Customers Page

## Customer Reports

A variety of customer reports can be generated by selecting **Reports > Customers** in the Admin Panel.

The following describes the available customer reports:

- ❖ **New Accounts:** Shows the customers that have opened accounts in your web store during the period that you specify.
- ❖ **Customer by orders total:** Lists customers in descending order of money spent in your web store.
- ❖ **Customer by number of orders:** Lists customers in descending order of number of orders placed in your web store.

## Importing and Exporting Customer Information

Another way to add customer records to Magento CE is by importing the data from a comma-separated values (CSV) file. The file that you upload must be in Comma-Separated Values (CSV) format. Most spreadsheet and database applications can read and create CSV files. This feature is convenient if you have existing customer information in another system and you want to bring it into Magento CE.

In order to import a CSV file into Magento CE, it must have certain characteristics. Specifically, each column heading must exactly match the Attribute Code for the attribute in that column. An easy way to get the correct column headings is to export the existing Magento CE customer data to a CSV file, then add or update the information to the CSV file before re-importing it into Magento CE.

## Exporting Customer Data

To export customer information:

1. In the Admin Panel, select **System > Import/Export > Export**.
2. Select **Customers** from the **Entity Type** drop-down list. The system generates a list of entity attributes that are relevant to your customers.
3. By default, all attributes are exported to the CSV file. In the Entity Attributes list, select the **Skip** check box for any attributes that you want to exclude from the CSV file.
4. By default, all records are exported to the CSV file. Use the controls in the **Filter** column to limit the records that are exported.
5. Click **Continue** to export your selected product information to a CSV file.
6. Open the saved file in your favorite spreadsheet application and edit as needed.

## Importing Customer Data

With the Import feature, you can upload a file that contains the records for as many customers as you want.

### To import a customer CSV file:

1. In the Admin Panel, select **System > Import/Export > Import** to open the Import page.
2. Select **Customers** from the **Entity Type** drop-down list.
3. Select one of the **Import Behavior** options from the drop-down list:
  - ❖ **Append Complex Data:** Adds new or edited products to your store’s database. Magento CE will not create duplicate entries for existing products and customers included in your CSV file.
  - ❖ **Replace Existing Complex Data:** Completely replaces your existing data or portions thereof.
  - ❖ **Delete Entities:** Completely deletes your existing database or portions thereof.
4. Click **Browse** and locate the CSV file in your local computer’s file system.

**Note** The total size of the CSV file must not exceed the maximum size for your environment (typically 32 MB) and must be saved with UTF-8 encoding. Check your spreadsheet or database application documentation for information about saving a CSV file with UTF-8 encoding.

5. Click **Check Data** to validate the uploaded file.
6. If the uploaded file is valid, a “File is valid!” response appears. Import your products or customers by clicking **Import**. If your file contains errors, Magento CE notifies you of the errors and enables you to skip the erroneous rows and importing the valid products or customers by clicking **Import**.

When the import is complete, the “Import was successfully done” message appears.

## 13.2 Managing Orders

The section “Managing Orders, page 64, introduces the procedures for handling the day-to-day order management tasks in your web store. This section assumes that you are familiar with that information.

See “Viewing the Orders in Your Web Store,” page 65 for a description of how to view and edit the Orders in your web store. This section goes into more details about the order life cycle in Magento CE.

## Orders Terminology

This section describes some of the terms used for handling orders in Magento CE. In addition to creating orders, there are many features in the Magento CE backend that are part of the process of managing and fulfilling orders, such as creating invoices, shipments, and credit memos, and editing and cancelling orders.

### Sales Order

When an order is created in a Magento CE web store, either in the frontend or in the backend, a sales order record is created to record this transaction. This sales order can be seen in the orders list by selecting the **Orders** option from the **Sales** menu in the backend.

This is only a temporary record. Payment has not yet been processed and the order can still be canceled.

### Invoice

An invoice is a record of the receipt of payment for an order.

**Note:** In some cases, payment is automatically received during the creation of an Invoice.

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.

### Shipment

A shipment is a record of the products in an order that have been shipped. As with invoices, multiple shipments can be associated with a single order, until all of the products in the order are shipped.

### Credit Memo

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.

## Creating New Orders

This section describes how to create an order using the backend, such as when an order is received on the phone.

To create a new order from the backend:

1. In the Admin Panel, select **Sales > Orders**.
2. Click the **Create New Order** button on the top right of the page to display the Create New Order page, as shown in Figure 222.



Figure 222. Create New Order Page

3. Select a customer If you have multiple websites, stores, or store views, select the one to which this order applies. The Create New Order for <customer> page opens, as shown in Figure 223.

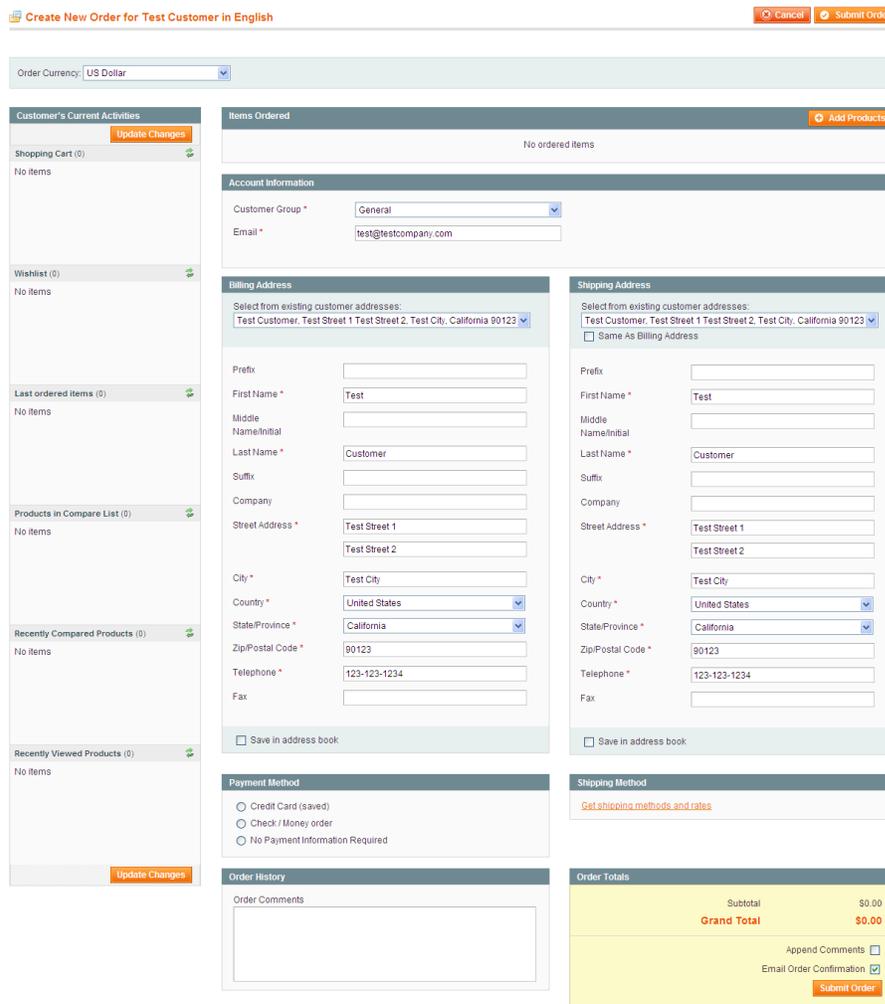


Figure 223. Create New Order for <customer> Page

**Note:** If the customer does not already exist in your customer records, click **Create New Customer** on the first Create New Order page. You will need to complete all the address information.

- Click the **Add Products** button to display the list of products, as shown in Figure 224.

ID	Product Name	SKU	Price	Qty To Add
166	HTC Touch Diamond	HTC Touch Diamond	\$750.00	<input type="checkbox"/>
162	Microsoft Wireless Optical Mouse 5000	micronmouse5000	\$59.99	<input type="checkbox"/>
161	Logitech diNovo Edge Keyboard	logidlinovo	\$239.99	<input type="checkbox"/>
160	Logitech Cordless Optical Trackman	logitechcord	\$79.99	<input type="checkbox"/>
159	Microsoft Natural Ergonomic Keyboard 4000	microsoftnatural	\$99.99	<input type="checkbox"/>
157	30" Flat-Panel TFT-LCD Cinema HD Monitor	M9179LL	\$699.99	<input type="checkbox"/>
156	19" Widescreen Flat-Panel LCD Monitor	W1952TQ-TF	\$399.99	<input type="checkbox"/>
155	Seagate 250GB HD - 5400RPM	250gb5400	\$99.00	<input type="checkbox"/>
154	Seagate 500GB HD - 5400RPM	500gb5400	\$299.00	<input type="checkbox"/>
153	Intel Core 2 Extreme QX9775 3.20GHz Retail	intelcore2extreme	\$2,049.99	<input type="checkbox"/>
152	24" Widescreen Flat-Panel LCD Monitor	W2452T-TF	\$699.99	<input type="checkbox"/>
151	Intel C2D E8400 3.0GHz Retail	intelc2d	\$98.99	<input type="checkbox"/>
150	Western Digital 500GB HD - 7200RPM	500gb7200	\$299.00	<input type="checkbox"/>
149	Western Digital - 1TB HD - 7200RPM	1tb7200	\$399.00	<input type="checkbox"/>

Figure 224. Product List for Creating Orders

- Use the check boxes to select the products to be purchased, and click the **Add Selected Product(s) to Order** button.

**Tip:** If you selected one of the existing customers, then the left column shows a list of the products that this customer has in his/her cart, wish list, recently ordered, viewed, or compared. To add one those products to the order, select the required product and click **Update Changes** button.

- Complete the other mandatory fields of the order. Mandatory fields are marked by an asterisk (\*).
- You can define many options for the order, such as choosing custom prices for products and applying discount codes.
- After you have completed all the required order information, click the **Submit Order** button to display the order information page.
- To confirm payment, click the **Invoice** button to generate an invoice for your review.
- Review the invoice, and if all is well, click the **Submit Invoice** button at the bottom of the page.
- When you are ready to ship the products, click the **Ship** button to generate a Shipment document.

12. If applicable, you can add a tracking number received from the shipping service by clicking the **Add Tracking Number** button. Adding a tracking number enables customers to view the status of their shipment using the shipping carrier’s website.
13. Review the shipment. You can modify the quantity to be shipped if only part of the order is ready.

The order status changes to **Completed** after all its products have been shipped.

14. Click the **Email Copy of Shipment** option to automatically send an email to notify the customer that the products were shipped.
15. Click the **Submit Shipment** button at the bottom of the page.
16. Click the **Back** button to return to the orders page, where you can create additional Orders if needed.

## Clearing the Shopping Cart

If, at any time during the ordering process, the customer decides not to move forward with the order, you can clear the customer’s shopping cart in either of two ways:

- ❖ Click the **Clear Shopping Cart** button on the Create New Order page (see Figure 225).

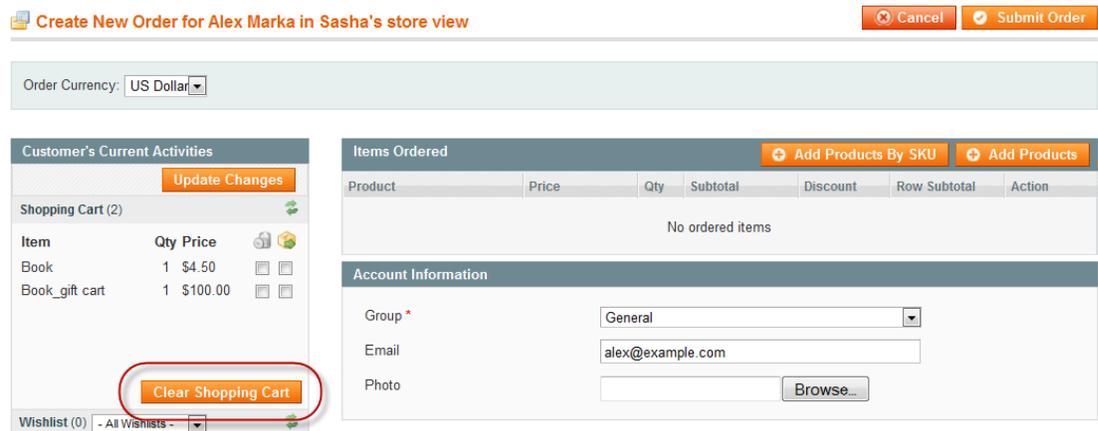


Figure 225. Clearing the Shopping Cart on the Create New Order Page

- ❖ Click the **Clear Shopping Cart** button on the Shopping Cart page (**Customers > Manage Customers > %customer% > Manage Shopping Cart**); see Figure 226.

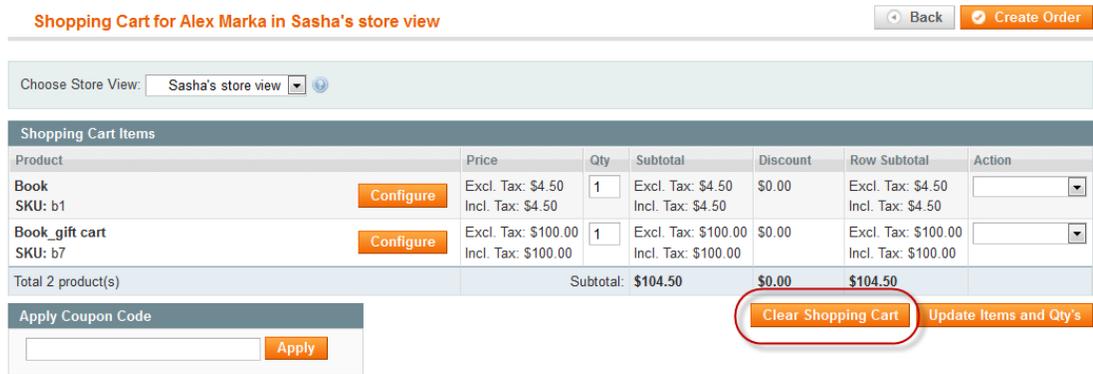


Figure 226. Clearing the Shopping Cart on the Shopping Cart Page

## Refunding

You can create a record of a product refund from an existing order by generating a credit memo.

To view the list of refunds made in your web store:

From the **Sales** menu, select the **Credit Memos** option to display the Credit Memos page, as shown in Figure 227.

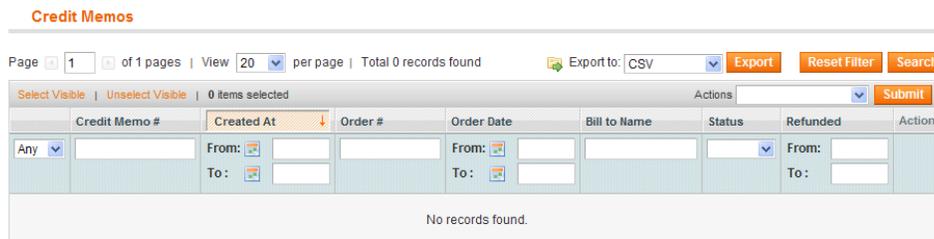


Figure 227. Credit Memos Page

To refund a product from an existing order:

**Note:** You can create credit memos only for orders for which invoices were created. Without an invoice, an order is assumed not to be paid so that there is nothing to refund.

1. In the Admin Panel, select **Sales > Orders** to display a list of the existing orders.
2. Click the **View** link on the right side of the row of the desired order to display the order view page.
3. Click the **Credit Memo** button to generate a credit memo.
4. Scroll down to the **Items to Refund** area, and in the **Qty to Refund** field of each relevant product, specify the quantity of products to refund.
5. To specify that this product was actually returned to the web store, select the **Return to Stock** check box, as shown in Figure 228.

Items to Refund									
Product	Price	Qty	Return to Stock	Qty to Refund	Subtotal	Tax Amount	Discount Amount	Row Total	
Coalesce: Functioning On Impatience T-Shirt SKU: coal_sm Size Small	\$15.00	Ordered 1 Invoiced 1	<input type="checkbox"/>	<input type="text" value="1"/>	\$15.00	\$1.24	\$0.00	\$16.24	
<input type="button" value="Update Qty's"/>									

Figure 228. **Items to Refund**

- (Optional) Select the **Email Copy of Credit Memo** check box, as shown in Figure 229, to automatically send an email to the customer that the order has been refunded. You can also adjust the refund totals to match your business rules.

Refund Totals	
Subtotal	\$15.00
Tax	\$1.24
Refund Shipping	<input type="text" value="5"/>
Adjustment Refund	<input type="text" value="0"/>
Adjustment Fee	<input type="text" value="0"/>
<b>Total Refund</b>	<b>\$21.24</b>
Append Comments <input type="checkbox"/>	
Email Copy of Credit Memo <input type="checkbox"/>	
<input type="button" value="Refund"/>	

Figure 229. **Refund Totals**

- Click the **Refund** button at the bottom of the page. The total of the order from which this product was refunded is updated automatically.
- Click the **Back** button to return to the orders page where you can create additional orders, if required.
- Note:** Refunding an order in Magento CE does not cause an actual payment refund. You must refund the payment on your own. The credit memo is only a record used to track the refunds and to provide proper values in the reports.



# 14 Managing Customer-Generated Content

This chapter describes how to manage customer generated content, such as ratings, reviews, tags, and polls.

## 14.1 Managing Ratings and Reviews

Rating and review functionality is provided by Magento CE to enable customers and web store owners to give their opinions, feedback, and comments about products. Ratings and reviews appear in the frontend, as shown in Figure 230.



Figure 230. Ratings and Reviews Links on the Frontend

The quantity of stars indicates the satisfaction rating. You can click on the **Review(s)** link to display the actual reviews provided by customers or input your own Review, as shown in Figure 231.

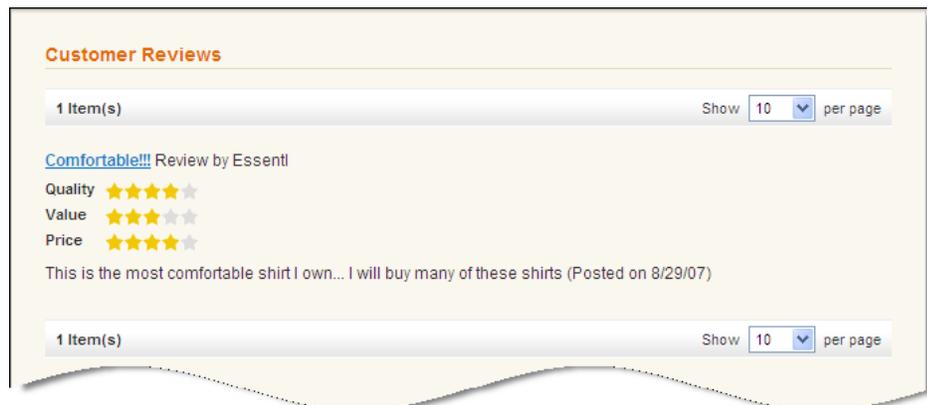


Figure 231. Customer Reviews Frontend Interface

To add a review, the customer clicks on the **Add Your Review** link on the product information page to open the Write Your Own Review page, as shown in Figure 232.

### Write Your Own Review

You're reviewing: Coalesce: Functioning On Impatience T-Shirt

How do you rate this product?\*

	1 star	2 stars	3 stars	4 stars	5 stars
Quality	<input type="radio"/>				
Price	<input type="radio"/>				
Value	<input type="radio"/>				

Nickname\*

Summary of Your Review\*

Review\*

[Submit Review](#)

Figure 232. Write Your Own Review Page (Frontend)

## Adding a Custom Rating

By default, the customer can rate the quality, price, and value of a product. You might want to add custom ratings, to enable customers to rate such aspects as durability, warranty, and so on. This section describes how to create a new customized rating.

1. In the Admin Panel, select **Catalog > Reviews & Ratings > Manage Ratings** to display the Manage Ratings page, as shown in Figure 233.

**Manage Ratings** [Add New Rating](#)

Page 1 of 1 pages | View 20 per page | Total 3 records found [Reset Filter](#) [Search](#)

ID	Rating Name
3	Price
1	Quality
2	Value

Figure 233. Manage Ratings Page

2. Click the **Add New Rating** button to display the New Rating page, as shown in Figure 234.

**New Rating** Back Reset Save Rating

If you do not specify a rating title for a store, the default value will be used.

**Rating Title**

Default Value \*

English

French

German

**Rating Visibility**

Visible In

**Main Website**

**Main Store**

English

French

German

Figure 234. New Rating Page

3. In the **Default Value** field enter a name for this rating.
4. Click the **Save Rating** button.

## Approving Reviews for Public Viewing

New reviews that are submitted by customers must be approved by the web store administrator in the backend before they appear on the frontend.

To view and approve new reviews:

1. In the Admin Panel, select **Catalog > Reviews & Ratings > Customer Reviews > Pending Reviews** to display the Pending Reviews page, as shown in Figure 235.

**Pending reviews**

Page 1 of 1 pages | View 20 per page | Total 1 records found | [Pending Reviews RSS](#) Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	ID	Created On	Title	Nickname	Review	Visible In	Type	Product Name	Product SKU	Action
<input type="checkbox"/>	114	Mar 24, 2009 11:58:12 PM	Great Product!	test	Good quality and interesting print.	Main Website Main Store English	Guest	Coalesce: Functioning On Impatience T-Shirt	coal_1	<a href="#">Edit</a>

Figure 235. Pending Reviews Page

2. Click the **Edit** link on the right side of the relevant review's row to display the Review Details page, as shown in Figure 236.

Review Details

Product: [Coalesce: Functioning On Impatience T-Shirt](#)

Posted By: Guest

Summary Rating: ★★★★★

Detailed Rating \*

	1 star	2 stars	3 stars	4 stars	5 stars
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Status \*  
Pending

Visible In \*  
Main Website  
Main Store  
English  
French  
German

Nickname \*  
test

Summary of review \*  
Great Product!

Review \*  
Good quality and interesting print.

Figure 236. Review Details Page

3. You can modify the review, if required.
4. In the **Status** field, change the **Pending** status to **Approved** or **Not Approved**.

## 14.2 Managing Tags

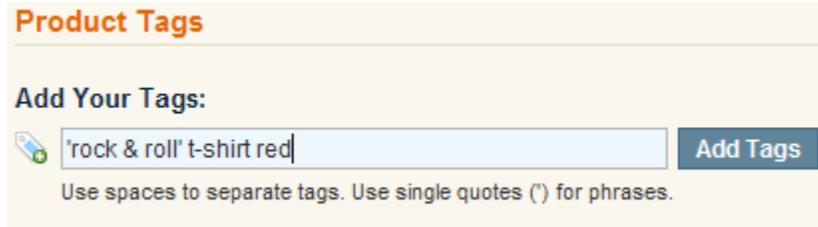
Tags can be assigned by customers directly in the frontend. A tag describes a specific property of a product, such as Cool, Valentine's gift and so on. Popular Tags serve as a descriptor that customers can select in order to view the products to which a specific tag has been assigned. Figure 237 shows an example of various tags as they appear in the web store.



Figure 237. Tags Display in the Frontend

## Adding Tags

The number of tags that can be added to a product is unlimited and they can later be renamed or deleted. To add one or more tags to a product, the customer scrolls down on the product page to the Product Tags section, as shown in Figure 238.



**Product Tags**

**Add Your Tags:**

Use spaces to separate tags. Use single quotes (') for phrases.

Figure 238. Adding Product Tags (Frontend)

Tags must be separated by spaces, and phrases (two or more words that comprise a single tag) must be enclosed in single quotation marks ('). Figure 238 shows what it looks like when a customer adds three tags:

- ❖ rock and roll
- ❖ t-shirt
- ❖ red

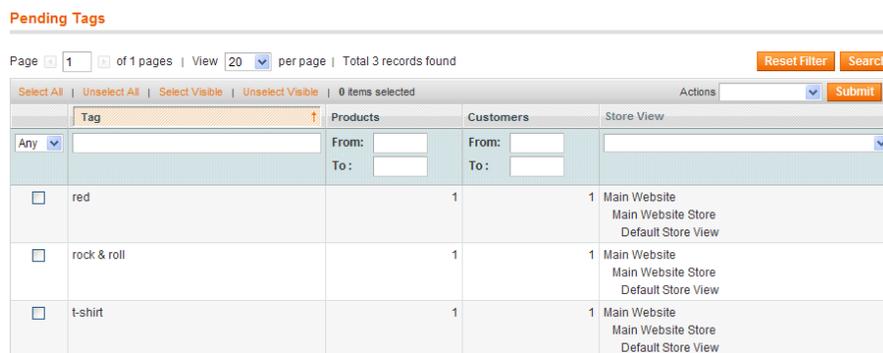
After a customer submits product tags, an administrator has to approve them on the backend so that they will appear on the frontend.

## Approving Tags

Tags must first be approved by the backend administrator before they appear on the front-end. After a tag has been approved by the backend administrator, it can be used for other products and does not need to be approved again.

### To approve a tag:

1. In the Admin Panel, select **Catalog > Tags > Pending Tags** to display the Pending Tags page, as shown in Figure 239.



**Pending Tags**

Page 1 of 1 pages | View 20 per page | Total 3 records found

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected | Actions

	Tag	Products	Customers	Store View
Any	<input type="text"/>	From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>
<input type="checkbox"/>	red	1	1	Main Website Main Website Store Default Store View
<input type="checkbox"/>	rock & roll	1	1	Main Website Main Website Store Default Store View
<input type="checkbox"/>	t-shirt	1	1	Main Website Main Website Store Default Store View

Figure 239. Pending Tags Page

This page shows a list of tags that have not yet been approved.

2. Use the check boxes in the left column to select all of the tags that you want to approve (or all of the tags that you want to disable).
3. In the **Action** drop-down list, select **Change Status**. The **Status** drop-down list becomes visible.
4. In the **Status** drop-down list, select **Approve** (or **Disable**).

**Note:** To modify a tag or view details about a tag, such as the product or products it was applied to, or the name of the customer who submitted it, click the row for that tag.

**Note:** If a customer has entered a tag that you do not want to ever see again, simply change the status to **Disabled**.

## 14.3 Managing Polls

Polls provide a powerful marketing tool for finding out the opinion of your customers about your products, store, customer service, or anything else.

It is very simple to create a poll. Figure 240 shows an example of how a poll appears in the frontend.



**COMMUNITY POLL**

**What is your favorite color**

Green

Red

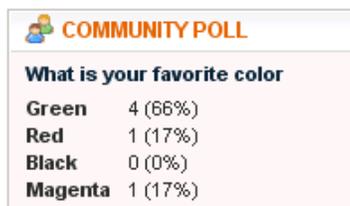
Black

Magenta

**Vote**

Figure 240. Poll on the Frontend

A poll occupies only a small amount of space on your store pages and is shown in the right column by default. Poll results are immediately displayed to the customer after the customer submits an answer, as shown in Figure 241.



**COMMUNITY POLL**

**What is your favorite color**

<b>Green</b>	4 (66%)
<b>Red</b>	1 (17%)
<b>Black</b>	0 (0%)
<b>Magenta</b>	1 (17%)

Figure 241. Poll Results

## To create a poll:

1. In the Admin Panel, select **CMS > Polls** to open the Poll Manager page, which shows a list of existing polls.
2. Click the **Add New Poll** button in the top right corner of the page to display the New Poll page, as shown in Figure 242.

Figure 242. New Poll Page

3. In the **Poll Question** field, enter the question that your customer will be asked.
4. In the **Status** field, specify whether the poll is **Open** or **Closed**. The status of the poll is **Open** by default, which means that it appears in your store. If you do not want it to appear in your store, select the **Closed** option.
5. Select one or more stores that you want the poll to appear in.
6. Click the **Poll Answers** option in the left panel to display Assigned Answers page.
7. Click the **Add New Answer** button to add possible answers to your question that can be selected by customers, as shown in Figure 243.

Figure 243. Assigned Answers Page

8. In the **Answer Title** field, specify the text of the answer to appear in your store for customers to select.

9. To influence the poll results in advance, you can add votes to the count in the **Votes Count** field, which is 0 by default.
10. Repeat steps 7 through 9 for each answer that you want to appear in this poll.
11. Click the **Save Poll** button.

Customers can answer a poll only once and you can view the results in the backend by clicking on the row for the poll in the Poll Manager page. If you have multiple polls open, they will cycle randomly in the frontend, meaning customer may see a different poll every time they refresh a frontend page.

## Editing a Poll

After a poll has been created, you can edit it by clicking on the roll for the poll in the Poll Manager page (CMS > Polls).selecting the **Poll Manager** option from the **CMS** menu.

To close the poll so that it no longer appears in the store, change the **Status** field to **Closed** in the **Poll information** section.

To see the votes that have been tallied for each answer, click the **Poll Answers** option in the left panel to display the number of votes in the **Vote Count** field, as shown in Figure 244.

Assigned Answers		
Answer Title: *	<input type="text" value="Layered Navigation"/>	<input type="button" value="Delete"/>
Votes Count: *	<input type="text" value="1889"/>	
Answer Title: *	<input type="text" value="Price Rules"/>	<input type="button" value="Delete"/>
Votes Count: *	<input type="text" value="1340"/>	
Answer Title: *	<input type="text" value="Category Management"/>	<input type="button" value="Delete"/>
Votes Count: *	<input type="text" value="724"/>	
Answer Title: *	<input type="text" value="Compare Products"/>	<input type="button" value="Delete"/>
Votes Count: *	<input type="text" value="762"/>	

Figure 244. Poll Results (Backend)

# 15 Monitoring and Improving the Web Store

## Store

This chapter describes how to monitor and improve your web store by using reports, search terms, synonyms, redirects, and Google Analytics

### 15.1 Reports

This section describes some of the most important reports in Magento CE. This section first provides a full description of how to generate a Sales Report and a brief description of other important reports.

#### Generating Reports

Magento CE provides a variety of reports that you can access at any time. To see the reports that you can generate in Magento CE, 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, as shown in Figure 245.

The screenshot shows the 'Total Shipped Report' interface. At the top right is a 'Show Report' button. Below it is a 'Show Report For' dropdown menu currently set to 'All Websites'. A 'Filter' section contains several controls: 'Match Period To' is a dropdown set to 'Order Created Date'; 'Period' is a dropdown set to 'Day'; 'From' and 'To' are date input fields with calendar icons; 'Order Status' is a dropdown set to 'Any' with a note 'Applies to Any of the Specified Order Statuses'; and 'Empty Rows' is a dropdown set to 'No'.

Figure 245. Report Filter Controls

- ❖ The **Show Report For** drop-down list enables you to select the store view or website (or all websites) to report on.
- ❖ The **Match Period To** drop-down list enables you to select which records to report on, based on either the order creation date or the order modified date.
- ❖ The **Period** drop-down list enables you to aggregate the report data into rows for each day, month, or year within your report **From** and **To** dates.
- ❖ Use the **From** and **To** calendar controls to determine the start and end dates that will be covered by the report.
- ❖ For **Order Status**, select **Any** to include all orders, or select **Specified** to select one or more order status values from a list.

- ❖ The **Empty Rows** drop-down list enables you to select whether to include date period rows that have no data.
- ❖ The **Show Actual Values** drop-down list enables you to select whether to display actual (**Yes**) or projected (**No**) values. Projected values are based on estimates of amounts to be paid.

When you are finished making filter selections, click **Show Report** (or **Refresh**, in some reports) to generate the report. To export the report information shown on the screen, select the **CSV** (Comma Separated Values) option or the **Excel XML** option from the **Export to** drop-down list, and click **Export**.

## Refreshing Sales Report Statistics

To reduce the performance impact of generating sales reports (those that are available under **Reports > Sales**), Magento CE 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.

The sales report statistics need to be refreshed in order for the reports to use the most recent data. Refreshing the sales report statistics is a manual process.

### To refresh the Sales Report statistics:

1. In the Admin Panel, select **Reports > Refresh Statistics** to open the Refresh Statistics page, as shown in Figure 246.

**Refresh Statistics**

Select All   Unselect All   Select Visible   Unselect Visible   0 items selected			Actions
	Report	Description	Refresh Statistics for the Last Day <input type="button" value="Submit"/>
<input type="checkbox"/>	Orders	Total Ordered Report	Jul 24, 2011 10:04:45 PM
<input type="checkbox"/>	Tax	Order Taxes Report Grouped by Tax Rates	Jul 24, 2011 10:04:45 PM
<input type="checkbox"/>	Shipping	Total Shipped Report	Jul 24, 2011 10:04:45 PM
<input type="checkbox"/>	Total Invoiced	Total Invoiced VS Paid Report	Jul 24, 2011 10:04:45 PM
<input type="checkbox"/>	Total Refunded	Total Refunded Report	Jul 24, 2011 10:04:46 PM
<input type="checkbox"/>	Coupons	Promotion Coupons Usage Report	Jul 24, 2011 10:04:46 PM
<input type="checkbox"/>	Bestsellers	Products Bestsellers Report	Jul 24, 2011 10:04:46 PM

Figure 246. Refresh Statistics Page

2. Use the check boxes on the left to select the reports for which you want to have the statistics refreshed.
3. In the **Actions** drop-down list, select the scope of the statistics to be refreshed: **Refresh Lifetime Statistics** or **Refresh Statistics for the Last Day**.
4. Click **Submit**.

## Available Reports

The following describes the reports that are available in Magento CE.

Report	Path	Description
Total Ordered	<b>Reports &gt; Sales &gt;</b>	Shows orders for the specified time period.

Report	Path	Description
	<b>Orders</b>	
Order Taxes	<b>Reports &gt; Sales &gt; Tax</b>	Shows taxes charged for orders in the specified time period; grouped by tax rate.
Total Invoiced vs. Paid	<b>Reports &gt; Sales &gt; Invoiced</b>	Shows amounts paid and unpaid for invoiced orders in the specified time period.
Total Shipped	<b>Reports &gt; Sales &gt; Shipping</b>	Shows orders shipped in the specified time period, grouped by carrier/method; includes shipping charge amounts.
Total Refunded	<b>Reports &gt; Sales &gt; Refunds</b>	Shows refunds applied to orders in the specified time period.
Coupons Usage	<b>Reports &gt; Sales &gt; Coupons</b>	Shows coupons used for orders in the specified time period, grouped by coupon code.
PayPal Settlement	<b>Reports &gt; Sales &gt; PayPal Settlement Reports</b>	Shows PayPal settlements for the specified time period. Click <b>Fetch Updates</b> to retrieve data from PayPal.
Products in Carts	<b>Reports &gt; Shopping Cart &gt; Products in carts</b>	Shows products that are currently in shopping carts.
Abandoned Carts	<b>Reports &gt; Shopping Cart &gt; Abandoned Carts</b>	Shows shopping carts that were started but then abandoned. <b>Tip:</b> This report enables you to contact the customers and offer them discounts or otherwise turn an abandoned cart into a conversion.
Products Bestsellers	<b>Reports &gt; Products &gt; Bestsellers</b>	Shows the products that were sold in the highest quantity in the specified time period.
Products Ordered	<b>Reports &gt; Products &gt; Products Ordered</b>	Shows all products that were ordered in the specified time period.
Most Viewed	<b>Reports &gt; Products &gt; Most Viewed</b>	Shows the products that were viewed the most times in the specified time period.
Low Stock	<b>Reports &gt; Products &gt; Low Stock</b>	Shows the products whose stock levels are low.
Downloads	<b>Reports &gt; Products &gt; Downloads</b>	Shows the number of purchases and downloads for each downloadable product.
New Accounts	<b>Reports &gt; Customers &gt; New Accounts</b>	Shows the new accounts that were created during the specified time period.
Customers by Orders Total	<b>Reports &gt; Customers &gt; Customers by orders total</b>	Shows the customers listed in descending order of total order amount.
Customers by Number of Orders	<b>Reports &gt; Customers &gt; Customers by number of orders</b>	Shows the customers listed in descending order of number of orders placed.
Customers Reviews	<b>Reports &gt; Reviews &gt; Customers Reviews</b>	Shows the customers listed in descending order of number of reviews contributed.
Products Reviews	<b>Reports &gt; Reviews &gt; Products Reviews</b>	Shows the products listed in descending order of number of reviews.
Customers Tags	<b>Reports &gt; Tags &gt; Customers</b>	Shows the customers listed with the number of tags each one has created.
Products Tags	<b>Reports &gt; Tags &gt; Products</b>	Shows the number of unique tags and total number of tags created for each product.
Popular Tags	<b>Reports &gt; Tags &gt; Popular</b>	Shows the number of times each tag has been applied.
Search Terms	<b>Reports &gt; Search Terms</b>	Shows the terms that were submitted in the

Report	Path	Description
		<p>search tool.</p> <p><b>Tip:</b> If you see that the <b>Hits</b> field of a product shows a high number (meaning that customers search for it often), but the <b>Results</b> column shows a low number or zero, then you should review your product names and descriptions to promote products related to this keyword.</p>

## 15.2 Search Synonyms and Redirects

The following shows you how to fine-tune Magento’s search behavior. Two main options are provided:

- ❖ **Search Synonyms:** Misspelled search terms may mean missed opportunities for you. If you know that a frequently used search term is often misspelled by customers, and thus does not display results, you can add additional search terms.
- ❖ **Redirects:** You can specify that when a customer searches for a certain term that they are re-directed to a specific page. Direct customers to a specific product page, a specific brand landing page, or an informational page. For example, the search term “Returns” can take customers directly to the Shipping Policy page.

The following example demonstrates how to add the misspelled search term “latop” so that the results are returned for the correct term, “laptop.”

To add new search synonym and or redirection:

1. In the Admin Panel, select **Catalog > Search Terms** to display the Search page, as shown in Figure 247.

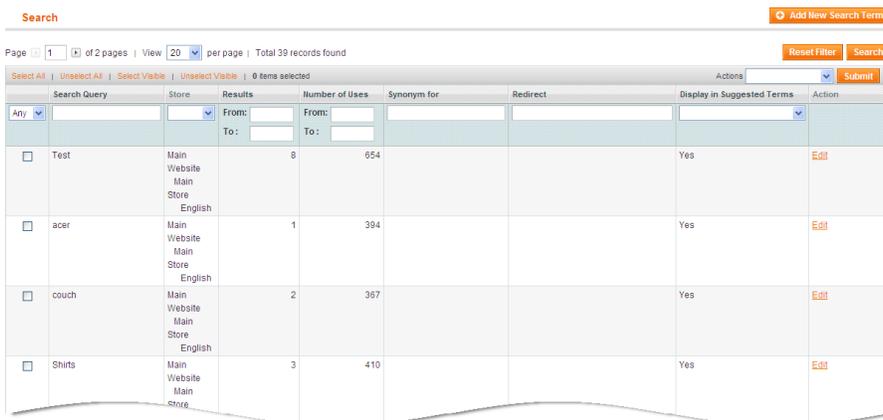


Figure 247. Search Page

2. Click the **Add New Search Term** button to display the New Search page, as shown in Figure 248.

Figure 248. New Search Page

3. In the **Search Query** field, specify the incorrect spelling of the term (“latop” in this example).
4. In the **Synonym For** field, specify the correct search term that is defined in your web store (“laptop” in this example).
5. In the **Redirect URL** field, specify the URL to which the customer is redirected when no results are returned for the search term.
6. Click the **Save Search** button.

## 15.3 Google Analytics

Google Analytics is a free service provided by Google to help website owners find out more about the traffic on their website and about conversions. Magento CE supports both the following Google Analytics options:

- ❖ **Page View Tracking:** Enables you to see the origin from which your web store visitors linked to your store.
- ❖ **E-commerce Tracking:** Enables you to see which customers make purchases and what they buy.

You can sign up to this service at <https://www.google.com/analytics>. While signing up, a report is displayed showing your new Google Analytics account number in the following format: UA-XXXXXXX-1. Write this number down, because it is required for configuring Google Analytics in Magento CE.

### To add Google Analytics tracking to Magento:

1. In the Admin Panel, select **System > Configuration > Google API**
2. Expand the Google Analytics section as shown in Figure 249.

Figure 249. Google Analytics Options

3. In the **Enable** field, select **Yes**.
4. In the **Account number** field, specify the Google Analytics account number that you wrote down when you signed up for the service.

**Tip:** Magento supports native integration with Google Website Optimizer, which is another free service from Google that enables you to test different versions of page elements and to select the elements that provide the best conversion rates.

# 16 Keeping Your Store Healthy

Now that you have your own web store running and are selling products, do not forget to keep it in good condition. Make sure that your hosting provider performs regular file and database backups

This chapter describes what you can do to keep your store healthy by using backups and rollbacks, using a staging environment, updating Magento CE, and extending Magento CE

## 16.1 Backups and Rollbacks

Magento CE enables you to perform different types of backups (backup of database, file system, or both) and to perform rollbacks automatically.

### Backup and Rollback Quick Reference

The main tasks related to creating backups and restoring the system are performed in the Magento Admin Panel under **System > Tools > Backups**.

Files are compressed using the .gz and .tgz formats. Backup files are stored in the `var/backups` directory in your Magento file system. The content of the `/var/cache`, `/var/log`, `/var/session` and `/var/report` folders is excluded from the backup.

### Creating and Managing Backups

#### To create a backup:

1. Log in to the Magento Admin Panel.
2. Navigate to **System > Tools > Backups**.
3. Click one of the following buttons, depending on the backup type you need to create:
  - ❖ **System Backup**: Creates a complete backup of the database and the file system. On the next step you will have the possibility to 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.
4. The confirmation dialog box appears. If you agree to put the store into the maintenance mode for the time of backup creation, select the corresponding check box. After the backup creation is completed, the maintenance mode is turned off automatically. If you are creating a system backup, select the **Include Media folder to System Backup** check box if you want to include the `media` folder. Confirm the backup creation.

Database backup files are compressed using the .gz format. For the system backups and database and media backups, the .tgz format is used. 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.

Records about all created backups are listed in a grid on the Backups page. Deleting a record deletes the archive file as well.

## Rolling Back the System

### To roll back the whole system or the database:

1. In the Magento Admin Panel, navigate to **System > Tools > Backups**
2. The Backups page opens, where all previously created backups are listed in a grid. For the desired backup, click the **Rollback** link in the Action column. Note that all changes made since the backup creation will be lost after the rollback.
3. Confirm rolling back, specify your Magento Admin Panel account password, and choose whether you want to put your store into the maintenance mode for the time of rolling back. When restoring file system or database and media files you can choose to use the FTP connection.
4. After the rollback, you are redirected to the login page to log in to the Admin Panel.
5. Refresh cache types and rebuild required indexes. This can be done under **System > Cache Management** and **System > Index Management**, respectively.

**Important note:** Use the Rollback functionality with caution. Customers who are in the process of checking out when you start the rollback may not be able to complete the checkout.

## Limiting Access to the Backup and Rollback Functionality

Access to the Backups and Rollback functionality management can be restricted by configuring user permissions for Backups and Rollback resources of the Admin Panel for an admin role.

Role permissions are configured under **System > Permissions > Roles > %desired role%**. See Figure 250 for illustration of a role permission tree on the Role Information page.

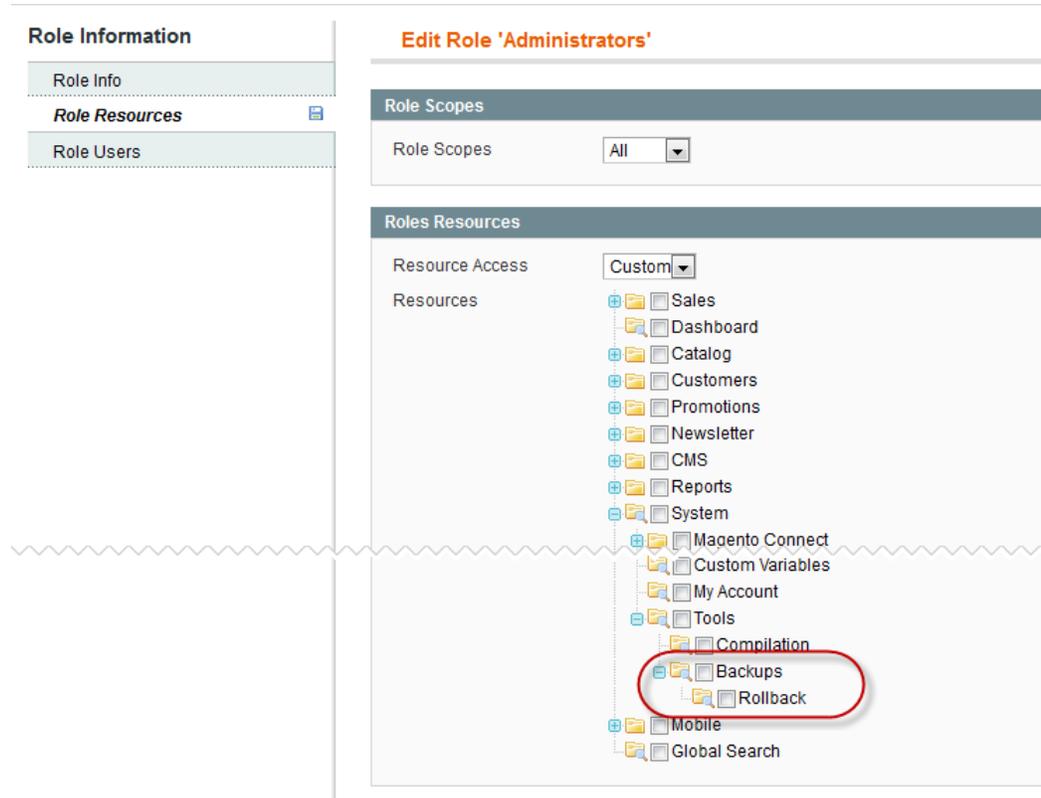


Figure 250. Defining access permissions to the Backup and Rollback functionality

To restrict access to the Backup and/or Rollback resources, leave the corresponding check box cleared. If you need to grant access to the Rollback resources, you must grant access to Backup resources as well.

## Creating a Backup from the Magento Connect Manager

In the Magento Connect Manager (MCM), you can choose to create a backup before installing an extension or upgrading Magento.

### To create a backup before installing an extension from MCM:

1. Navigate to **System > Magento Connect > Magento Connect Manager**.
2. Select the **Create Backup** check box and select the backup type. See Figure 251.
3. Proceed with installing extension or updating Magento. The backup will be created automatically, and will be listed in the grid under **System > Tools > Backups** in the Magento Admin Panel.

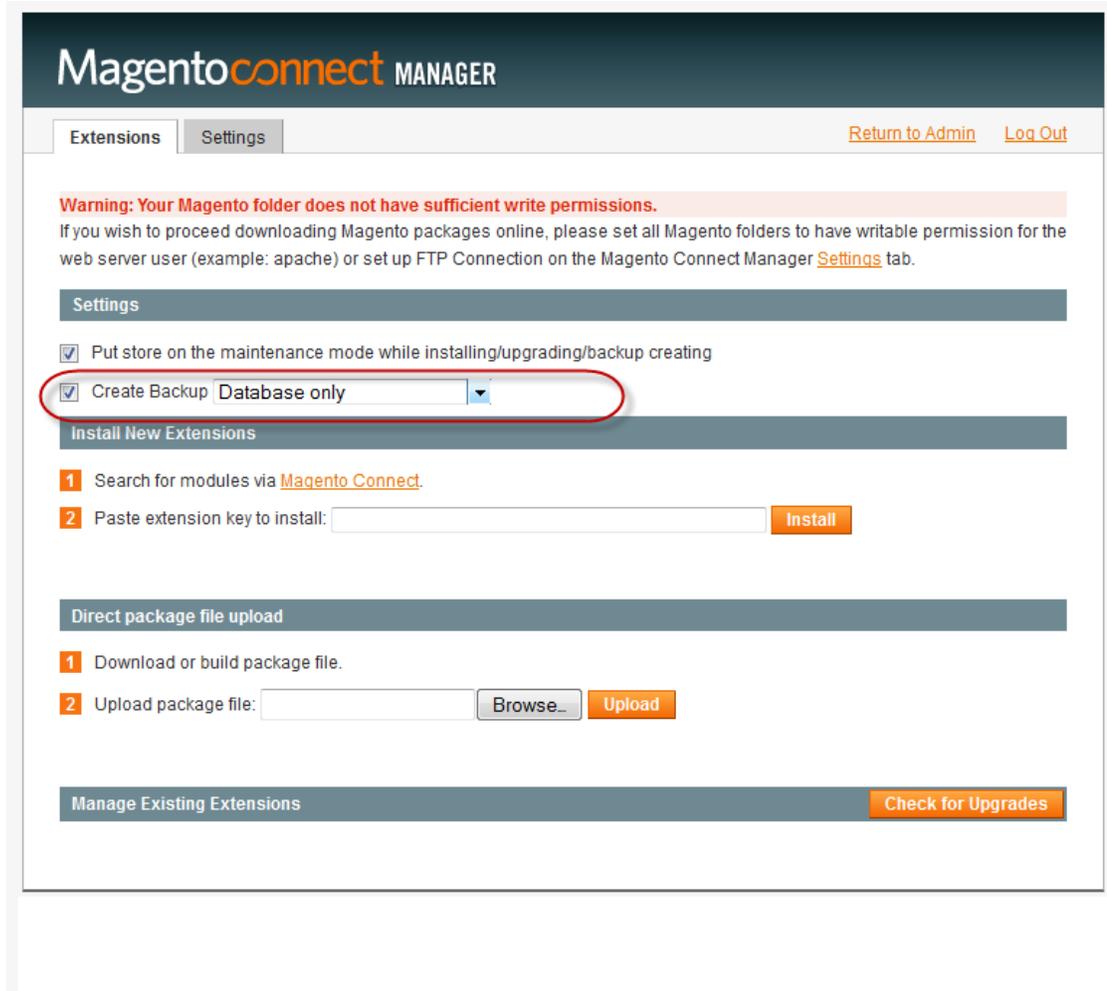


Figure 251. Selecting to create a backup in Magento Connect Manager

## 16.2 Staging Environment

If you plan to change and develop your web store over time, we recommend that you set up a staging environment (also called a testing environment) in which you can test your ideas before applying them to the live store. We highly recommend that you also use this environment when updating new versions of Magento CE.

At its simplest, the staging environment is just like any other Magento CE installation that is not accessible to the public. If you are modifying the files, you can keep them synchronized with the live files using any of the various available version control tools.

## 16.3 Updating Magento CE

Magento CE is constantly evolving. New features are added and problems resolved on an ongoing basis. From time to time you will be notified about a new Magento CE version. This notice will be published in the Magento CE blog and the backend will display a message when you log in. If the update is critical, contains mandatory updates, or resolves issues that you have encountered, you should definitely update your web store.

**Warning:** If your store has a custom theme, when you upgrade it to a new version, you will benefit from the bug fixes, but new front-end functionality may not be visible. Upgrading between major versions, such as between version 1.1 and 1.2, can render your site and any custom functionality unusable until you perform a few minor configuration changes (which are usually noted along with the new version announcement). We strongly recommend that you first test all upgrades in a staging environment before applying it to your live store.

To update your web store to a new version:

1. In the Admin Panel, select **System > Magento Connect > Magento Connect Manager**.
2. Log in using your backend username and password and click **Log In**. The Magento Connect Manager page is displayed, as shown in Figure 252.

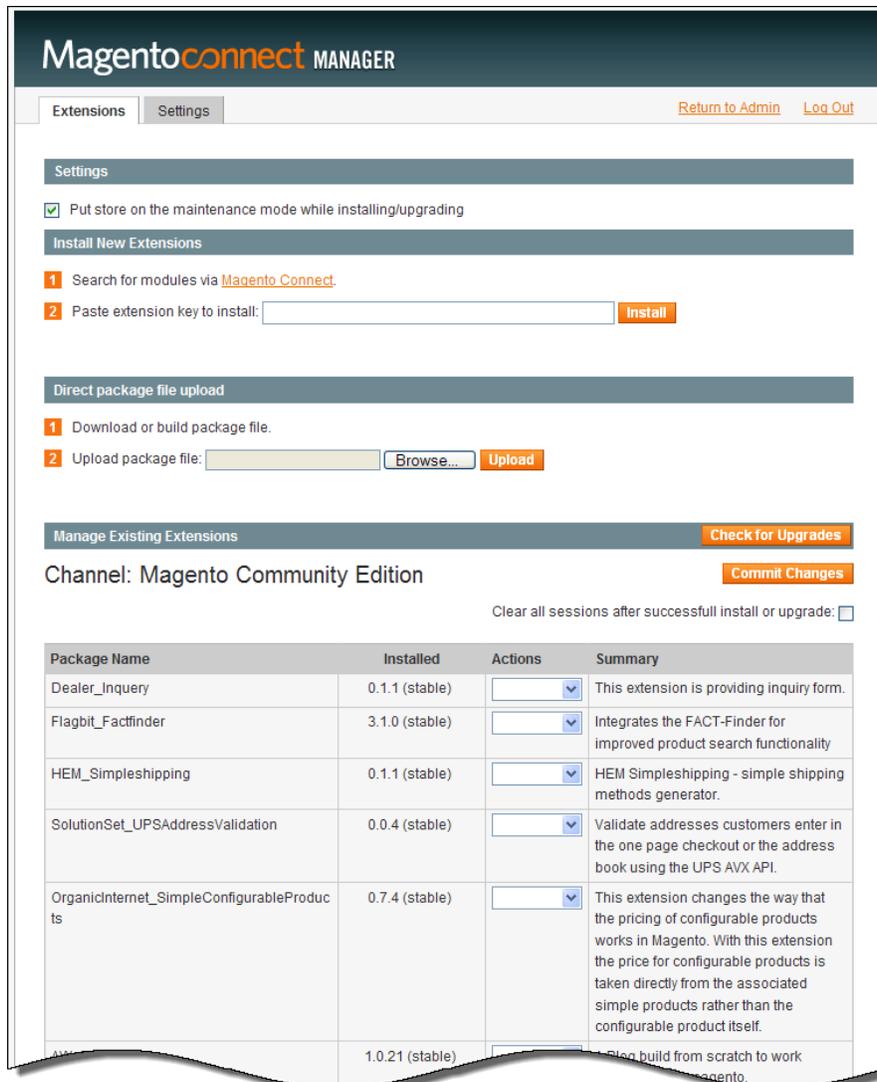


Figure 252. Magento Connect Manager Page

3. Click the **Check for Upgrades** button. If there are upgrades available for any of the Magento CE modules, they are marked in yellow.
4. In the **Actions** column, select the upgrades to be installed and click the **Commit Changes** button.
5. Wait until the installation has finished and click the **Return to Admin** link in the header.
6. Congratulations! You have just upgraded your Magento CE. Now check your site to make sure everything works as expected.

## 16.4 Extending Magento

There are hundreds of payment gateways and shipping providers all over the world. Magento CE 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 CE with various new features. If you need to add functionality to Magento CE, you should first search for it on Magento Connect, which is our marketplace for extensions. You can access Magento Connect at: <http://www.magentoocommerce.com/magento-connect>. The Magento Connect home page is displayed, as shown in Figure 253.

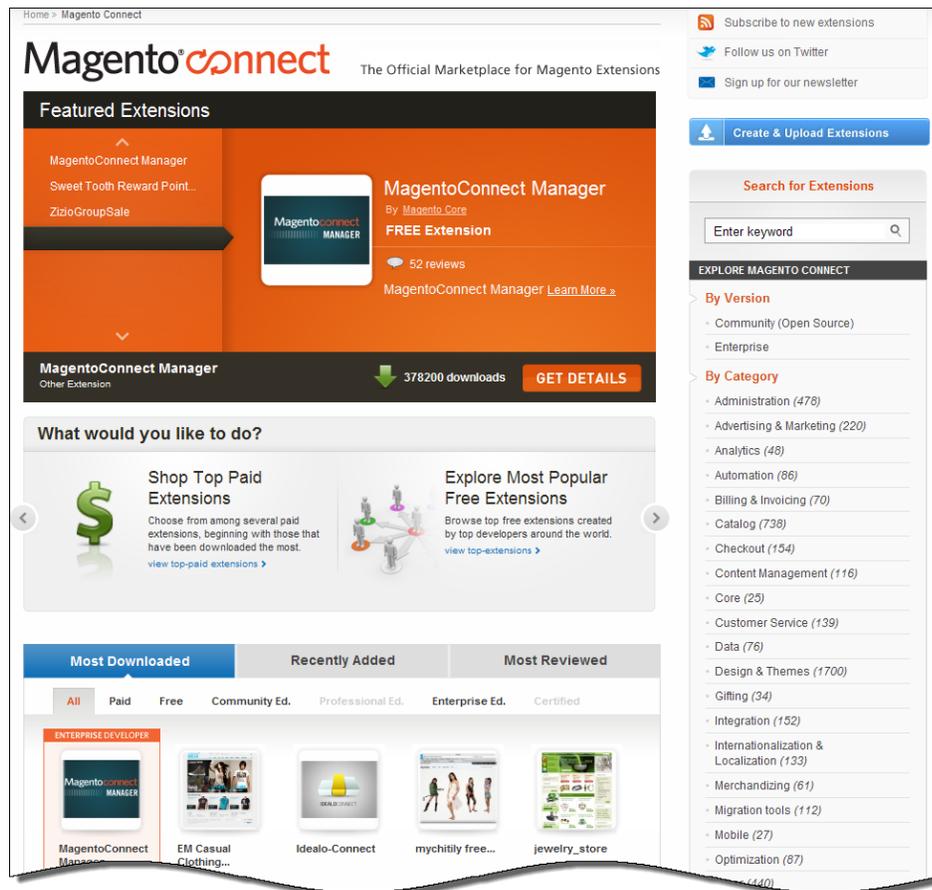


Figure 253. Magento Connect Home Page

Various free extensions are provided from this page.

The following example shows how to install the iDEAL core payment extension that adds a new payment method to the store called iDEAL.

**Note:** There are also commercial extensions available for purchase on their publishers' pages. The installation process for each one may vary. Please consult the extension author for installation instructions.

### To install a free extension:

1. Go to the **MagentoConnect** page on the **MagentoCommerce** site at <http://www.magentoocommerce.com/>.
2. Browse through the extensions using the filters provided in the panel on the right.
3. Go into the details page of the desired extension to display a page similar to Figure 254.

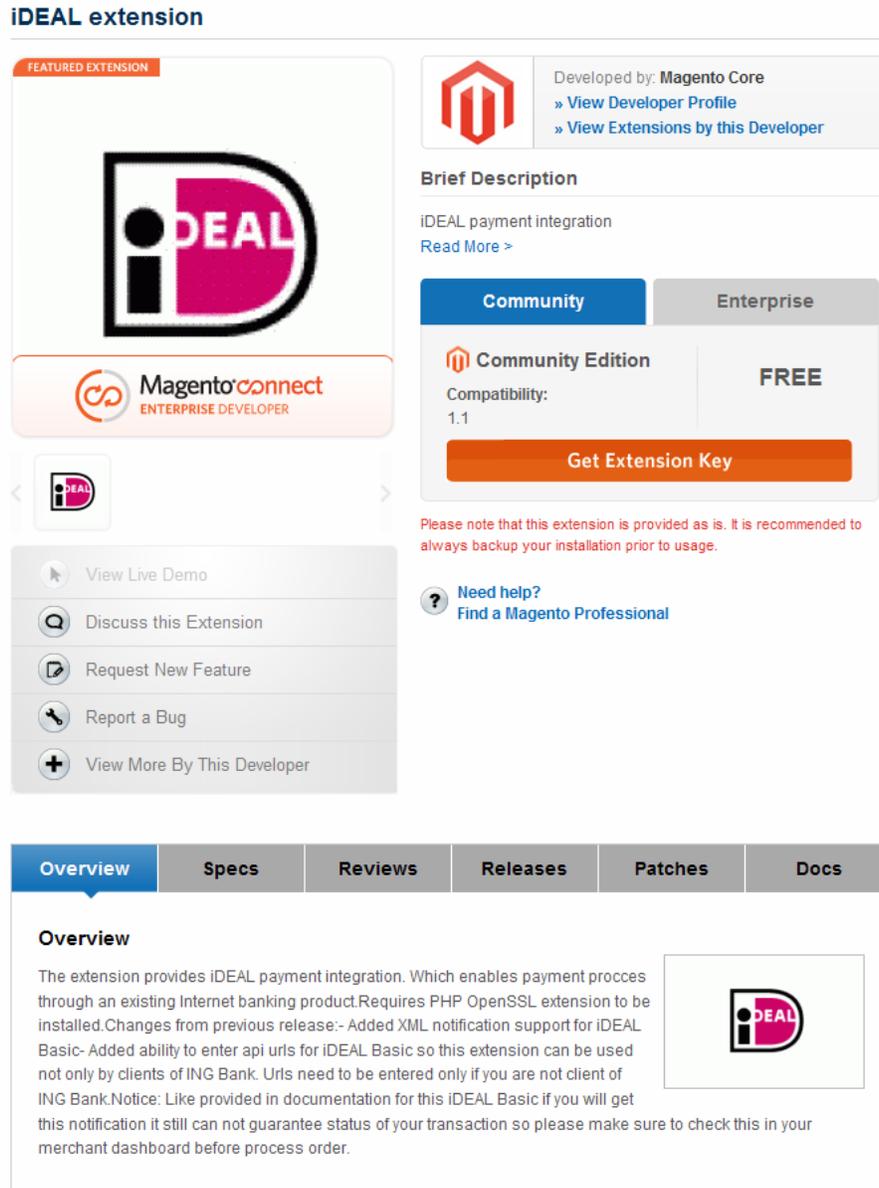


Figure 254. Extension Details Page

4. Click **Get Extension Key** to display the following:



5. Click the link to read the license agreement, then accept the licensing agreement by selecting the agreement check box.
6. An extension key similar to the following is displayed: **magento-core/Mage\_Ideal**. This is a special link to an extension that Magento recognizes. Click **Select** to select it and then copy it to the clipboard (**Ctrl+C**).
7. In the Admin Panel, select **System > Magento Connect > Magento Connect Manager**.
8. Log in using your backend username and password and click **Log In**.
9. Paste the extension key in the **Install New Extensions** section, as shown in Figure 255.

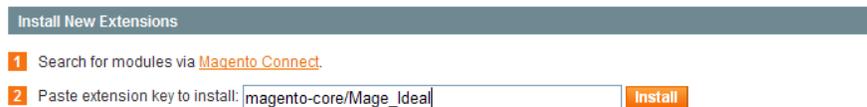


Figure 255. Pasting the Extension Key

10. Click the **Install** button and wait until the installation has finished.

You can now return to the backend and start using the extension that you have just installed!

**Note:** After you install a payment module, this new option appears in the **System** menu under **Configuration > SALES > Payment Methods**.

## 16.5 CAPTCHA

CAPTCHA functionality is used to ensure that a human being is interacting with the site, rather than another computer. It can be used in the backend and frontend. CAPTCHA in Magento is visual and is fully configurable.

The CAPTCHA was implemented using a module from Zend Framework.

### CAPTCHA: Quick Reference

The following table lists the main tasks related to the CAPTCHA functionality, and the places where they are performed in the Magento Admin Panel.

Task	Admin Panel Menu	Scope
Enable and configure the CAPTCHA for the backend	<b>System &gt; Configuration &gt; ADVANCED &gt; Admin &gt; CAPTCHA</b>	Global

Task	Admin Panel Menu	Scope
Enable and configure the CAPTCHA for the frontend	<b>System &gt; Configuration &gt; CUSTOMERS &gt; Customer Configuration &gt; CAPTCHA</b>	Website

## Enabling and Configuring CAPTCHA for the Backend

To enable and configure CAPTCHA for the backend:

1. Log in to the Magento Admin Panel.
2. Navigate to **System > Configuration > ADVANCED > Admin > CAPTCHA**. Make sure that the **Current Configuration Scope** is set to **Default**.
3. Configure the following settings:
  - ❖ **Enable CAPTCHA in Admin:** Enables CAPTCHA for the login pages of the Admin Panel.
  - ❖ **Font:** Defines the font used for CAPTCHA displaying. To add your own font, put the font file in the same directory as your Magento instance and specify it in the `config.xml` file that is stored in the `app/code/core/Mage/Captcha/etc/` folder.
  - ❖ **Forms:** Defines the form, on which CAPTCHA is displayed. Available options: **Admin Login** and **Admin Forgot Password**.
  - ❖ **Displaying Mode:** Defines preconditions for displaying CAPTCHA. Available options: **Always** or **After number of attempts to login**. If the latter is selected, the **Number of Unsuccessful Attempts to Login** text field is displayed. Setting **Number of Unsuccessful Attempts to Login** to 0 (zero) is similar to setting **Displaying Mode** to **Always**. The **After number of attempts to login** option does not cover the Forgot Password form. If the CAPTCHA functionality is enabled and set to be displayed on this form, then it is always displayed on the form.

**Note:** To track the number of unsuccessful login attempts, 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 applied only when the CAPTCHA functionality is enabled.

- ❖ **CAPTCHA Timeout (minutes):** Defines how long the displayed CAPTCHA is valid. After the timeout the user needs to reload the page.
- ❖ **Number of Symbols:** Defines the number of symbols that are used for creating CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, `5-8`; each generated CAPTCHA can contain different number of symbols.
- ❖ **Symbols Used in CAPTCHA:** Defines what symbols are used in 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”, “l”, “1”. Displaying these symbols in CAPTCHA decreases the chances that a user will recognize CAPTCHA correctly.

- ❖ **Case Sensitive:** Defines whether letters in CAPTCHA are case sensitive.
4. To save the settings click **Save Config**.

## Enabling and Configuring CAPTCHA for the Frontend

To enable and configure CAPTCHA displaying in the frontend:

1. Log in to the Magento Admin Panel.
2. Navigate to **System > Configuration > CUSTOMERS > Customer Configuration**.
3. In the **Current Configuration Scope** drop-down field select the desired website.
4. Expand the **CAPTCHA** field set. Configure the following settings:
  - ❖ **Enable CAPTCHA on Frontend:** Enables the CAPTCHA for the website frontend;
  - ❖ **Font:** Defines the font used for CAPTCHA displaying. To add your own font, put the font file in the same directory as your Magento instance and specify it in the *config.xml* stored in the *app/code/core/Mage/Captcha/etc/* folder.
  - ❖ **Forms:** Defines the forms where CAPTCHA is used. The following options are available: **Create User**, **Login**, **Forgot Password**, **Checkout as Guest**, and **Register during Checkout**.
  - ❖ **Displaying Mode:** Defines preconditions for displaying CAPTCHA. Available options: **Always** or **After number of attempts to login**. If the latter is selected, the **Number of Unsuccessful Attempts to Login** text field is displayed. Setting **Number of Unsuccessful Attempts to Login** to 0 (zero) is similar to setting **Displaying Mode** to **Always**. The **After number of attempts to login** option does not cover the **Forgot Password** and **Create User** forms. If the CAPTCHA functionality is enabled and these forms are selected in the **Forms** field, the CAPTCHA is always displayed on these forms.

**Note:** 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.

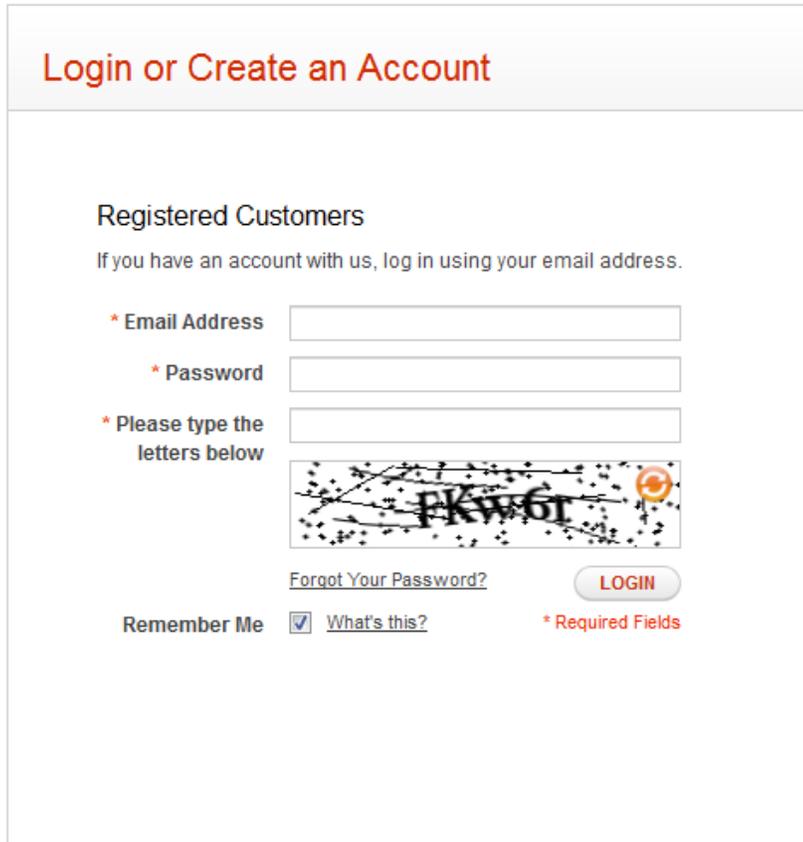
- ❖ **CAPTCHA Timeout (minutes):** Defines for how long the displayed CAPTCHA is valid. After the timeout a user needs to reload the page.
- ❖ **Number of Symbols:** Defines the number of symbols that are used for creating CAPTCHA. Maximum allowed value is 8. You can also specify a range, for example, 5-8.
- ❖ **Symbols Used in CAPTCHA:** Defines what symbols are used in 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", "l", "1". Displaying these symbols in CAPTCHA decreases the chances that a user will recognize CAPTCHA correctly.

❖ **Case Sensitive:** Defines whether letters in CAPTCHA are case sensitive.

5. To save the settings click **Save Config**.

## CAPTCHA: User Experience

The CAPTCHA in Magento is visual. The following pictures illustrate the way CAPTCHA is displayed in the frontend and the backend.



The screenshot shows a login form titled "Login or Create an Account". Under the heading "Registered Customers", there is a sub-heading "If you have an account with us, log in using your email address." The form contains three required fields: "Email Address", "Password", and "Please type the letters below". The CAPTCHA image displays the letters "FKW61" on a background of black dots and lines. A "Reload" icon (a circular arrow) is located in the top right corner of the CAPTCHA image. Below the CAPTCHA image, there is a link for "Forgot Your Password?", a "Remember Me" checkbox which is checked, and a link for "What's this?". A "LOGIN" button is positioned to the right of the "Remember Me" checkbox. A red asterisk and the text "\* Required Fields" are located at the bottom right of the form.

Figure 256. CAPTCHA in the frontend

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.

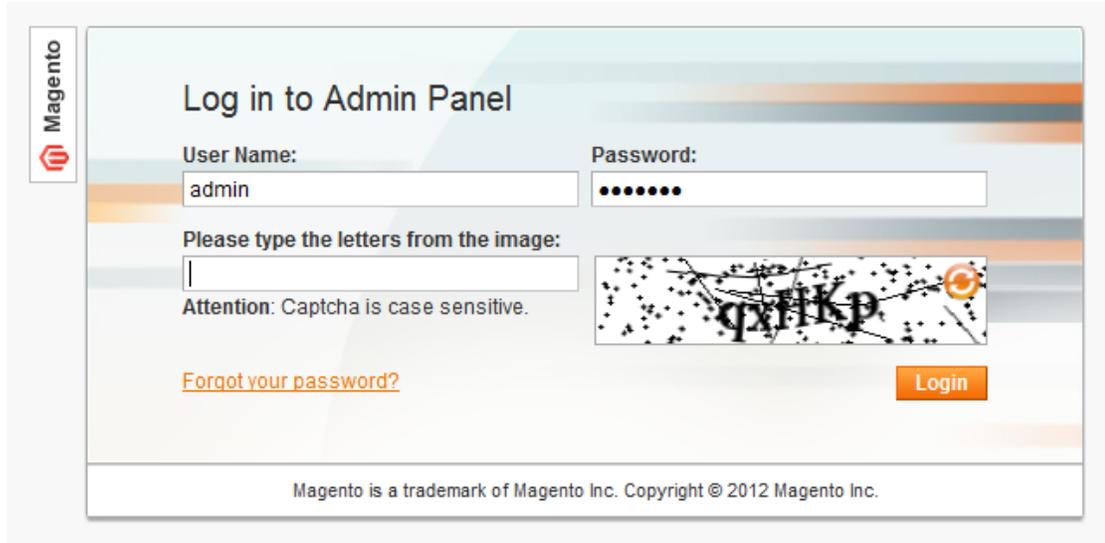


Figure 257. CAPTCHA in the backend

Admin 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.



# 17 Getting Help

Magento CE offers a variety of options and possibilities, but also has a learning curve. Magento provides several resources for getting help discovering Magento CE and using it daily to attain your eCommerce objectives.

You can start with the **Search** field at the top of the community site found at <http://www.magentocommerce.com>, which provides results from the Magento forum, knowledge base, wiki, groups, and other resources.

If you are unable to find answers to your questions, try posting your question in the Magento Answers site and the Magento forums, where thousands of participants help each other with Magento issues.

## To access Magento Answers:

Go to <http://www.magentocommerce.com/answers/> and log in or using the user name and password that you created before downloading Magento CE. (If you do not have a Magento user name, you can register for one from this page.) Follow the onscreen directions to ask your question.

## To access Magento forums:

Go to <http://www.magentocommerce.com/boards> and log in using the user name and password that you created before downloading Magento CE. Choose a forum that best matches your question.

If you found the answer yourself and were unable to find it elsewhere, please share it with others. Use the wiki or forums to write and share it.

There are also several other community features in addition to the forums described above that enable the exchange of ideas and help. They are:

- ❖ **Groups:** Link community members working on or interested in specific subjects, such as Designing For Magento and Drop Shippers.
- ❖ **Chat:** Provides a real time discussion with Magento community members.
- ❖ **Wiki:** Provides community editable pages for sharing ideas and findings, tutorials and information

The following lists other resources available to help you use get the most out of Magento:

## Knowledge Base

The Magento knowledge base is a Wiki that provides instructions published by Magento or community members in the form of guides and “how-to” articles.

At: <http://www.magentocommerce.com/knowledge-base>

## Webinar Archive

Up-to-date webinars are provided by Magento in which you can learn real-world tips and tricks in order to get the most out of your stores and promotions.

At: <http://www.magentoocommerce.com/media/webinar-archive>

## Screen casts

Screen casts are presentation videos that can guide you through many of the Magento features.

At: <http://www.magentoocommerce.com/media/screencasts>

## Magento Designer's Guide

The Magento Designer's Guide provides information for designers describing Magento concepts and design implementation in Magento.

At: [http://www.magentoocommerce.com/design\\_guide](http://www.magentoocommerce.com/design_guide)

## Magento Blog

The Magento Blog contains fresh updates describing new Magento releases, interesting showcases and events.

At: <http://www.magentoocommerce.com/blog>

## Magento on Twitter

You can keep up with Magneto events and announcements by following Magento on Twitter.

At: <http://twitter.com/magento>

## Technical Documents and Magento Core API

These provide developers with information on how to develop Magento CE.

At: <http://docs.magentoocommerce.com/>

Here you can find information about all Magento classes and functions.

At: [http://www.magentoocommerce.com/support/magento\\_core\\_api](http://www.magentoocommerce.com/support/magento_core_api)

Here you can find information and usage examples for calling Magento CE using an API. This enables easier integration of Magento CE with existing systems.

## Appendix: VAT ID Validation

All editions of Magento include a value-added tax (VAT) ID validation feature. The feature is intended for B2B merchants from the European Union (EU), where VAT is charged if a merchant and a customer are in the same country, and VAT is not charged if a merchant and a customer are in different countries within EU and both parties are EU-registered business entities.

VAT identification number (VAT ID) Validation enables store administrators to create more than one default customer group, which will be automatically assigned to each customer during account creation, address creation or update, and checkout according to the customer's VAT ID, and the customer's and merchant's location countries. This feature enables merchants to create different tax rules for intra-country (domestic) and intra-EU sales, and to apply the corresponding VAT amount automatically.

**Note:** VAT-related tax rules do not influence other tax rules and do not prevent applying other tax rules where applicable. Only one tax rule can be applied at a given time.

Magento performs VAT ID validation using the web-services of the European Commission server: [http://ec.europa.eu/taxation\\_customs/vies/](http://ec.europa.eu/taxation_customs/vies/).

### VAT ID Validation Quick Reference

The following table lists the main tasks concerned with the VAT ID Validation feature and the locations, where they can be performed in the Admin Panel.

TASK	ADMIN MENU	SCOPE
Create customer groups, which can be used as default for the VAT ID Validation functionality	<b>Customers &gt; Customer Groups</b>	
Enable the VAT ID Validation functionality	<b>System &gt; Configuration &gt; CUSTOMERS &gt; Customer Configuration &gt; Create New Account Options</b>	Store view
o Set the default groups for customers from your country and from other EU countries	<b>System &gt; Configuration &gt; CUSTOMERS &gt; Customer Configuration &gt; Create New Account Options</b>	Store view
o Set your country and VAT ID	<b>System &gt; Configuration &gt; GENERAL &gt; General &gt; Store Information</b>	Store view
o Modify Magento list of EU countries	<b>System &gt; Configuration &gt; GENERAL &gt; General &gt; Countries Options</b>	Global
o Edit the VAT Number customer address attribute	<b>Customers &gt; Attributes &gt; Manage Customer Address Attributes</b>	Global
o Create tax rates and tax rules for domestic, intra-EU and other VAT-related customer groups	<b>Sales &gt; Tax</b>	

For assigning groups to customers, the default customer's address (billing or shipping) for tax calculation is used; the setting is configured under **System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options > Tax Calculation Based On**).

If the VAT ID Validation feature is enabled, you can still choose not to apply it for a certain customer by selecting the correspondent check box on the Customer Information page under **Customers > Manage Customers**.

## Configuring VAT ID Validation

Configuring the VAT ID Validation includes these steps:

1. Creating VAT-related customer groups.
2. Creating tax classes, tax rates and tax rules.
3. Configuring the VAT ID Validation settings.
4. Setting your VAT ID and location country.
5. Modifying the list of EU member countries used by Magento. This step is only necessary if the EU gets new members or some countries leave the EU.

## Creating the VAT-Related Customer Groups

VAT ID Validation functionality automatically assign 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 to be used in the VAT ID Validation functionality or use existing groups, if they comply with your business logic. Customer groups are created under **Customers > Customer Groups**.

When configuring the VAT ID Validation functionality, you will need to assign each of the created customer groups as a default for customers with appropriate VAT ID validation results. For details see the Enabling and Configuring the VAT ID Validation Functionality section further.

## Configuring the VAT-Related Tax Rules

The VAT ID Validation functionality was implemented to facilitate the VAT applying for EU B2B merchants. In Magento, taxes are applied using the tax rules mechanism. Each tax rule is defined by three entities:

- ❖ Customer Tax Classes
- ❖ Product Tax Classes
- ❖ Tax Rates.

To use the VAT ID Validation functionality effectively, you need to create the appropriate tax rules.

**Important Note:** According to the EU taxation policy, the supply of services between businesses (B2B services) is in principle taxed at the customer's place of establishment ([http://ec.europa.eu/taxation\\_customs/taxation/vat/how\\_vat\\_works/vat\\_on\\_services/index\\_en.htm](http://ec.europa.eu/taxation_customs/taxation/vat/how_vat_works/vat_on_services/index_en.htm) ). So if you sell downloadable or virtual products, which do not require shipping, the VAT rate of a customer's location country should be applied for both, intra-union and domestic sales.

It means that you additionally need to create individual tax rules for a product tax class corresponding to the downloadable and virtual product types.

The following table contains the minimal list of tax rules which must be created to use the VAT ID Validation functionality.

<b>Tax rule #</b>	<b>Customer Tax Class</b>	<b>Product Tax Class</b>	<b>Tax Rate</b>
1	<ul style="list-style-type: none"> <li>• A class for domestic customers</li> <li>• A class for customers with invalid VAT ID</li> <li>• A class for customers, for whom VAT ID validation failed</li> </ul>	A class for products of all types, except bundle and virtual	VAT rate of the merchant's country
2	A class for intra-union customers	A class for products of all types, except downloadable and virtual	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%
3 (required only if you sell products of bundle or virtual type)	<ul style="list-style-type: none"> <li>• A class for domestic customers</li> <li>• A class for customers with invalid VAT ID</li> <li>• A class for customers, for whom VAT ID validation failed</li> </ul>	A class for downloadable and virtual product types	VAT rate of the merchant's country
4 (required only if you sell products of bundle or virtual type)	A class for intra-union customers	A class for downloadable and virtual product types	VAT rates for all EU countries, except merchant's country. Currently this rate is 0%

**Note:** It is recommended that you apply the merchant's VAT rate for customers with invalid VAT IDs and those for which validation fails. You can create other tax rules and apply other tax rates according to your business logic.

In the Magento Admin Panel, all tax rule related entities, including tax rules, tax rates, product tax classes and customer tax classes, are managed under **Sales > Tax**; tax classes are assigned to customer groups under **Customers > Customer Groups > %customer group%**.

## Enabling and Configuring the VAT ID Validation Functionality

To enable VAT ID and set default groups:

1. Log in to the Magento Admin Panel.
2. Navigate to **System > Configuration > CUSTOMERS > Customer Configuration**.
3. In the **Current Configuration Scope** field in the upper-left corner leave **Default Config** or select the desired store view.
4. Expand the **Create New Account Options** field set.
5. In the **Enable Automatic Assignment to Customer Group** field, select **Yes**. The following fields appear:
  - ❖ **Tax Calculation Based On:** Choose whether VAT calculation will be based on customer's shipping or billing address. If the customer does not have a shipping address (that is, the customer has only now registered and the system does not yet take into account the customer's shipping address), the Default Tax Destination Calculation address will be used for tax calculation to be displayed to the customer.

**Important Note:** If the **Tax Calculation Based On** is set to **Shipping Address**, then Magento will use billing address for VAT calculation, if a customer only buys downloadable and/or virtual products.

- ❖ **Group for Valid VAT ID – Domestic:** Choose a customer group, which is automatically assigned to customers coming from your country and whose VAT ID is valid. See “Configuring Additional Settings for the VAT ID Validation Feature,” page 263, for details about setting your location country.
- ❖ **Group for Valid VAT ID - Intra-Union** - Choose a customer group, which is automatically assigned to customers coming from EU countries other than yours, and whose VAT IDs are valid. See “Configuring Additional Settings for the VAT ID Validation Feature,” page 263, for details about where your location country is set.
- ❖ **Group for Invalid VAT ID:** Choose a customer group, which is automatically assigned to customers whose VAD ID is invalid.

- ❖ **Validation Error Group:** Choose a customer group, which is automatically assigned to customers for whom the VAT ID validation failed.
- ❖ **Validate on Each Transaction:** 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 frontend 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 Panel, no automatic validations are performed.
- ❖ **Default Value for Disable Automatic Group Changes Based on VAT ID** (available only if **Default Config** is selected in **Current Configuration Scope**): 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:
  - i. The VAT ID of the customer's default address or the whole default address changes.
  - ii. 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. If the automatic group change is disabled, the customer group that is assigned assigned never changes, unless an administrator changes it manually.
- ❖ **Show VAT Number on Frontend:** Choose whether the field for entering and storing the VAT ID number will be visible in the frontend.

6. To save the settings, click **Save Config**.

If the VAT ID Validation feature is disabled (the **Enable Automatic Assignment to Customer Group** field set to **No**), then the system behavior is as usual, and the default customer group can be set in the **Default Group** field.

When the feature is enabled, the system does not automatically validate customer VAT IDs nor does it change customer groups.

## Configuring Additional Settings for the VAT ID Validation Feature

To set your VAT ID and location country:

1. Navigate to **System > Configuration > GENERAL > General**.
2. In the **Current Configuration Scope** field, select the desired store view.

3. Expand the **Store Information** field set.
4. In the **Country** field, select your country.
5. In the **VAT Number** field, enter your VAT number. You can validate the entered value by clicking the **Validate VAT Number** button. The result of validation will be displayed immediately.

**Note:** If your VAT number is valid, then apart from validation result for each customer's VAT ID validation, the validation server will send to Magento the following additional information: VAT request identifier and VAT request date. If a customer's VAT validation is performed during checkout, then the VAT request identifier and VAT request date are saved in the Comments History section of the Order View page under **Sales > Orders >** (select appropriate order).

6. To save the settings, click **Save Config**.

#### To modify the list of the countries that are EU members:

1. Navigate to **System > Configuration > GENERAL > General**.
2. In the **Current Configuration Scope** field, select the desired store view.
3. Expand the **Countries Options** field set.
4. In the **European Union Countries** field make the necessary changes in the list of countries that are EU members.
5. To save the changes, click **Save Config**.

## VAT ID Validation Implementation Details: Customer Experience

### Assigning Customer Groups Based on VAT ID Value during Registration

If the VAT ID Validation feature is enabled, after registration each customer is proposed to enter the VAT ID number. However only those who are registered VAT customers are expected to fill this field.

After a customer specifies the VAT number and other address fields, and chooses to save, the system saves the address and sends the VAT ID validation request to the European Commission server. According to the results of the validation, one of the default groups is assigned to a customer. This group can be changed if a customer or an administrator changes the VAT ID of the default address or changes the whole default address. And the group can be temporarily changed (group change will be emulated) in some cases during one-page checkout.

## Applying and Assigning Customer Groups During Checkout

The system behavior concerned with the VAT ID validation and the customer group change during the checkout depends on how the **Validate on Each Transaction** and the **Disable Automatic Group Change** settings are configured. This section describes the implementation of the VAT ID Validation functionality for the checkout on the frontend.

In case a customer uses Google Express Checkout, PayPal Express Checkout or another external checkout method, when the checkout is performed completely on the side of the external payment gateway, the **Validate on Each Transaction** setting cannot be applied. Thus the customer group cannot change during checkout.

The following diagram illustrates the flow of VAT ID validation and customer group change during one-page checkout.

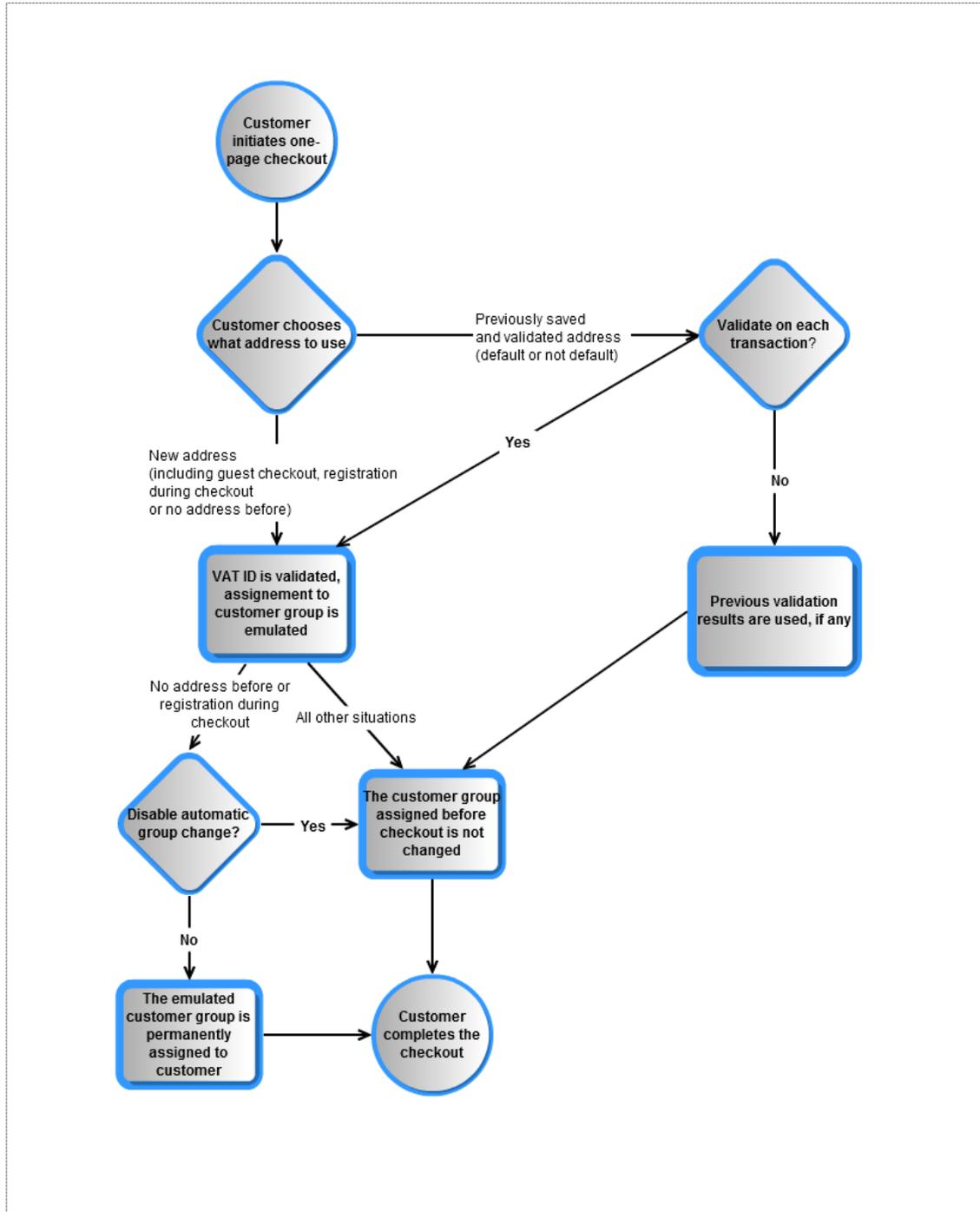


Figure 258. One-page checkout with VAT ID validation

# VAT ID Validation Implementation Details: Admin Experience

## The *VAT Number* Customer Address Attribute

Customer VAT ID value is stored in the **vat\_id** customer address attribute. The default label of this attribute is **VAT number**. Customer address attributes are managed under **Customers > Attributes > Manage Customer Address Attributes**.

The **VAT number** field is always present in all shipping and billing customer addresses in the backend. It is not mandatory. Displaying the field in the frontend is configured in the **Show VAT Number in Frontend** field under **System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options**.

**Note:** For customers not from the EU countries, consider storing the VAT number (if any), in the existing *Tax/VAT Number* customer attribute to avoid any possibility of customer group change (whether persistent or emulation during checkout). It is recommended that you rename the *Tax/VAT Number* customer attribute to avoid confusion with the new *VAT Number* customer address attribute that is used for the VAT ID Validation functionality.

## Disabling Automatic Customer Group Change

When the VAT ID Validation functionality is enabled, the group of a customer can only be changed manually in the Admin Panel, no automatic changes of customer group can take place.

When the VAT ID Validation functionality is enabled, the system will automatically, permanently change 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 a customer who registered during the checkout.

The automatic customer group change can be disabled by selecting the **Disable automatic group change** check box on the customer's page under **Customers > Manage Customers > %customer% > Account Information**. See Figure 259.

The screenshot shows the 'Customer Information' page for a user named Kristina Augilera. On the left is a navigation menu with options like 'Customer View', 'Account Information', 'Addresses', 'Orders', etc. The main area is titled 'Account Information' and contains several input fields. The 'Group' field is a dropdown menu currently set to 'Domestic'. Below it, there is a checkbox labeled 'Disable automatic group change' which is checked. This checkbox is highlighted with a red circle. Other fields include 'Associate to Website' (set to 'Sasha's website'), 'Created From' (set to 'Sasha's store view'), 'First Name' (Kristina), 'Last Name' (Augilera), and 'Email' (Kristina@ex.ua). At the top right, there are buttons for 'Back', 'Reset', and 'Create Order'.

Figure 259. Disabling automatic group change on customer level

**Important Note:** The setting does not influence the emulation of the customer group change during checkout.

The default value of the **Disable automatic group change** check box is set in the **Default Value for Disable Automatic Group Changes Based on VAT ID** field under **System > Configuration > CUSTOMERS > Customer Configuration > Create New Account Options**. The configuration setting is made on the global level. The default value applies to new customers and to customers whose records are available in the system when the VAT ID Validation functionality is enabled for the first time.

## VAT ID Validation in Customer Accounts in the Admin Panel

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.

**Note:** 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.

## VAT ID Validation During Order Creation in the Admin Panel

This section describes the system behavior when an admin creates a new order in the Admin Panel, with the VAT ID Validation functionality enabled and configured.

During order creation in the Admin Panel no VAT ID validation is performed automatically. To validate the VAT ID of the customer address, an administrator needs to click the **Validate VAT Number** button in the **Billing Address** or **Shipping Address** section of the Create New Order page. See Figure 260.

The figure shows two side-by-side screenshots of the Admin Panel's address creation forms. The left screenshot is titled 'Billing Address' and the right is 'Shipping Address'. Both forms have a dropdown menu at the top with the selected address: 'Alex Marka, Street, London, 1231cv, United Kingdom'. Below this, there are input fields for Prefix, First Name (Alex), Middle Name/Initial, Last Name (Marka), Suffix, Company, Street Address (Street), City (London), Country (United Kingdom), State/Province, Zip/Postal Code (1231cv), Telephone (123123), Fax, and VAT number (123456789). A red circle highlights the 'Validate VAT Number' button in the VAT number field of both forms. At the bottom of each form is an 'Attachment1' field with a 'Browse...' button and a checkbox for 'Save in address book'.

Figure 260. Validating customer VAT ID during order creation in the Admin Panel

After the validation, the administrator receives a notification about the validation results in the form of a pop-up message.

A customer group, which should be assigned to a customer according to the validation results, can differ from the customer group that is currently assigned to the customer. In this case the system displays a dialog box suggesting that the administrator confirm or reject the group change emulation for the customer's current order. If the administrator confirms, then 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 during the order creation, and an administrator confirms using the customer group that corresponds to the VAT ID validation results, then after the order creation the customer account is saved in the system and the customer group that was used for order creation is assigned to it.



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