WOO COMMERCE

INTRODUCTORY GUIDE

YEY STUDIO

Introduction

WooCommerce is a flexible, open-source eCommerce solution built on WordPress. Activate the free WooCommerce plugin on a new or existing WordPress site and set up a new store in minutes with:

- Product, Cart, and Checkout pages
- Various payment methods
- Configurable shipping options including flat rates
- Integrate content and commerce across your site via modular blocks
- [Automated tax calculations](#)
- [Google Analytics](#), [MailChimp](#), and [Facebook](#) integration
- [Central store dashboard](#) with key metrics and reports

You can also further enhance your woocommerce experience with useful plugins that you can purchase off the woocommerce extensions store. Setting up woocommerce on your store is as simple as adding the woocommerce plugin and going through the steps provided by the setup wizard. In order to get a full breakdown of all woocommerce features, please head on over to their [support site](#).

Dashboard

The dashboard gives you a quick overview of your store such as performance, sales, orders, returns, taxes as well as top products.

Orders

You can view details of your orders, execute order actions such as send emails and notifications to your customers or regenerate download permissions and also add details of the order process to the order notes. It can be helpful to add the details for manual payments to the order notes so that you have a timeline for each order.

Coupons

Coupons can allow your customers to check out with discounts and can be used as a great tool for promotions. You can customise your coupons by setting an expiry date, allowing it to be stackable with other coupons, setting a minimum spending limit in order to use the coupon, excluding the use of coupons on sales items and even setting the coupon to only be used for specific categories or products.

Reports

Can help you see different reports based on orders, customers, stock or taxes. This gives you an insight into how your store is performing and figure out the areas in which you can improve.

Settings

General

These are your general store settings which help you set up important details such as the company address, selling and shipping locations where you can select which countries you wish to sell and ship to, enable taxes as well as set up the store currency options. Depending on your wordpress theme you may have additional woocommerce customisations when you click customise through your wordpress theme editor.

These settings may include store notices, product alignment and order as well as checkout requirements and links to pages such as terms and conditions. These options can also be accessed from the back end, however front end access helps you see real time changes to your store.

Products

General

The general tab for your product settings is where you set up your shop page (which should be auto generated and if not it will need to be manually created), the default units of measurement for your products and whether you would like to allow customers to leave reviews and star ratings for the products in your shop.

Inventory

You can track your stock by enabling stock management in the inventory tab. Other functions include holding stock for unpaid orders for a set time period (after which pending orders can be cancelled) and enabling low or out of stock notifications so that when you reach the set limit you get an email notification. You can also choose to hide out of stock items in your catalog and display the current stock on products so that customers know how many items are left.

Downloadable products

If you sell digital products you can create downloadable products and set the product to automatically start downloading upon purchase. You can also set up access restrictions which will require customers to login to download content.

Tax

Tax options

There are a variety of taxes that you can set up for your store and while manual set up is provided you can also set up automated taxes. If you wish to set up automated taxes you are required to have the woocommerce services plugin. Settings such as whether products are entered inclusive/exclusive of taxes, additional tax classes (such as zero rates), displaying prices in the shop/cart with or without taxes and displaying tax as a single total or as an itemized list can be chosen from this tab.

Standard rates

Manually set tax rates for certain countries and states.

Reduced rates

Manually set up taxes when they are different based on the state or city.

Zero rate

Tax rate for products that are not applicable for tax.

Shipping

Shipping Zones

Add countries to your shipping zones with flat rates, free shipping, or store pick up shipping methods. For flat rates you can set the rate depending on the quantity or even set the shipping to be calculated as a percentage of the order total. If you have special shipping classes they can also be assigned to the zones after the class has been set up.

Shipping Options

Using these settings you can enable a shipping calculator on the cart page and set to select the customer address as the default destination for orders.

Shipping Class

Add special rates for items where you need to charge an additional shipping charge on top of the standard flat rate (eg: in situations where the product might cost more to transport to the customer than regular items). You can also add a second flat rate so that if a customer chooses a mix of products with normal shipping and products with a special shipping class, the shipping is calculated accordingly.

Payments

There are different payment methods that you can set up for your customers to choose from. Common methods are bank transfer or pay on delivery / pick up for which you can create manual fulfilments later.

Accounts & Privacy

On your account settings, you should make sure that your account page was auto generated during woocommerce set up and if not, it needs to be manually created. From this tab, you can enable the settings to allow your customers to register from the checkout or account page, set up login reminders for returning customers and also change the permalinks for different pages used in the shopping process such as 'orders'.

Emails

In your email settings you can set up what information customers can see on the emails they receive from your store. You can choose the name displayed as the sender as well as the email from which your store emails will be sent out. You can customise the email with a logo (header image), footer and preferred colours. If required the templates for different emails (eg: order confirmation) can be changed to include a personalised message.

Status

Helps you to log information which will be required when you need to request help from support staff.

Extensions

Plugins that enhance your store with helpful functions such as subscriptions, bookings and memberships are available for purchase (Eg. An appointment system).

Products

In order to make the shopping experience easy for your customers, you can upload different types of products depending on the type of product. You can also use a CSV file to make your product import process easier.

Simple products

Simple products are what you see as normal products in your shop. To upload a product you must enter a name, long tail and short tail descriptions, regular/sale prices, SKU, shipping weight and dimensions and select if it's taxable (along with relevant tax classes),

if you'd like to enable stock management or allow backorders. You can also choose the category for the product, tags to set up easy site navigation, product image as well as alternative images.

Additionally there are some tools that can help you increase your sales by allowing you to upsell and recommend other products that the customer might want or even cross sell by making recommendations appear straight in their cart. You can also add a purchase note that will get sent to the buyer upon purchase and select the level of priority that you want to give the item by changing its menu order.

Products with variables

If you have sizes or colour options for your products you must set up your product the same way as a simple product, but select 'variable product' from the drop down and add the relevant variants. In order to let your customers choose options you must first of all set up attributes by entering the names and values of those options (eg: colour as the name and blue, black as the values). After setting up the attributes and selecting that the attribute will be used as a variation, you can then head to variations and select the dropdown to enter the SKU, price, description etc for the specific variation. When the customer chooses an option, the relevant details will be displayed on the product page.

Grouped products

If you have products that you would rather group together and while entered as individual products you can use grouped products. For example you can set up a product called 'phone' by filling the fields you would for a simple product but choose 'grouped product' and this will be your parent product. Create its child products, for example 16GB and 32GB with their own prices. You can set these without filling any information, but you should hide them since they would not make much sense by themselves in the catalog. You can then go back to the parent product and add the child products to 'linked products'. This will allow customers to select 'phone' and see 16GB and 32GB as variants for the product, but unlike actual variants, they will appear as separate products.

Virtual products and Downloadable products

Setup your virtual and downloadable products just the same way you set up simple products and then select virtual or downloadable. The only difference between virtual and downloadable is the ability to attach a file to the downloadable option.

Affiliate products

Affiliate products can help you set up an external product for which you have an affiliate link. You can add relevant information such as description etc. and then add your affiliate link and price. When a customer views this product and clicks 'buy' they will be taken to the affiliate website, where if they buy the item you can get a commission.

Additional Customisations

If you wish to include additional functions such as gift wrap options you would have to add them through woocommerce plugins that can cost around 50$ to 200$ depending on what you choose. If you buy your plugins from woocommerce you can get additional support and updates. If you buy them from 3rd party websites such as woomill, you get significantly cheaper plugins, but you don't get support.

BACKEND

Introduction

The Woocommerce plugin accessible from your wordpress dashboard lets you manage orders, check on the stock levels of your products, view sales reports, generate coupons and maintain your customer base..

Dashboard

When you click on Woocommerce, you are taken to the dashboard which gives you an overview of your store. You can see your sales, top selling products and other useful information as well as have quick access to your Woocommerce inbox, orders and stock information which you can find at the top right corner.
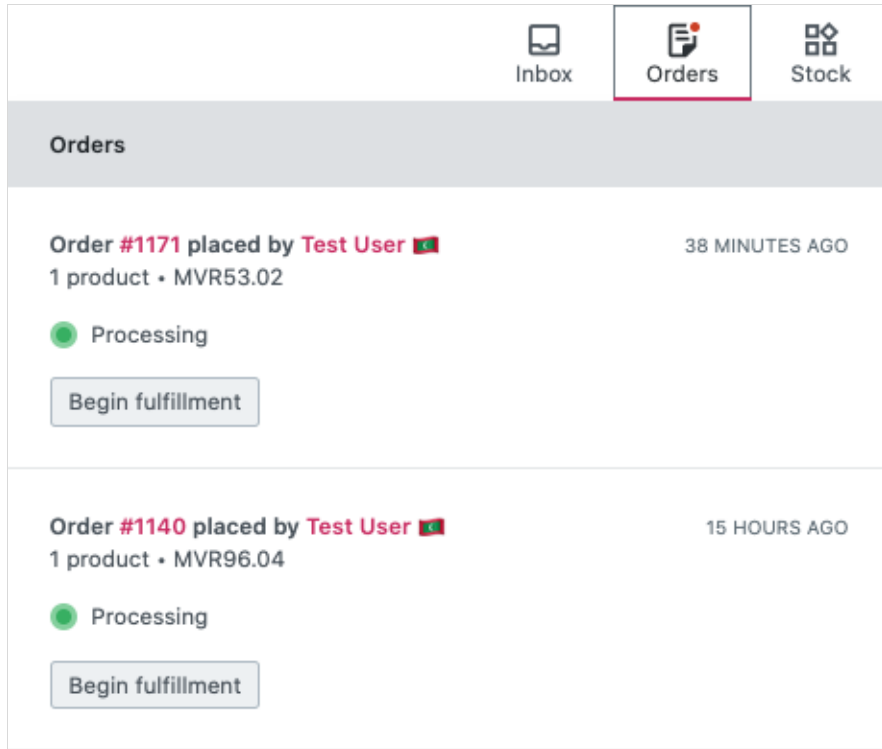
Inbox

Your inbox shows you updates as well as milestones and helpful guides on how you can use the various features of Woocommerce.
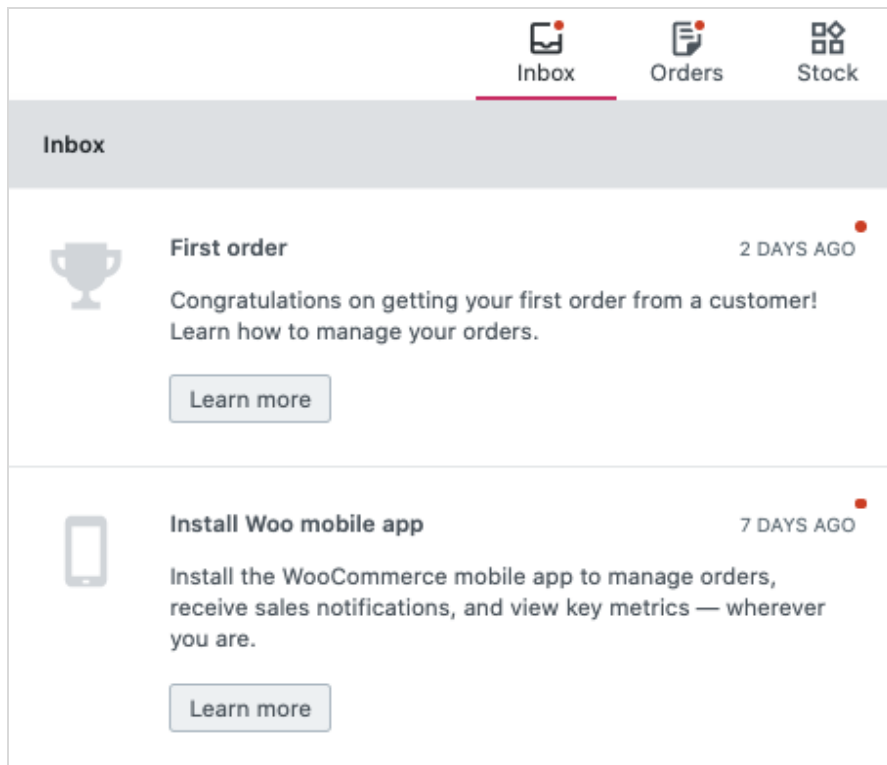
Orders

See the latest orders by clicking 'orders'. You can also click 'begin fulfilment' to get redirected to your order processing page.
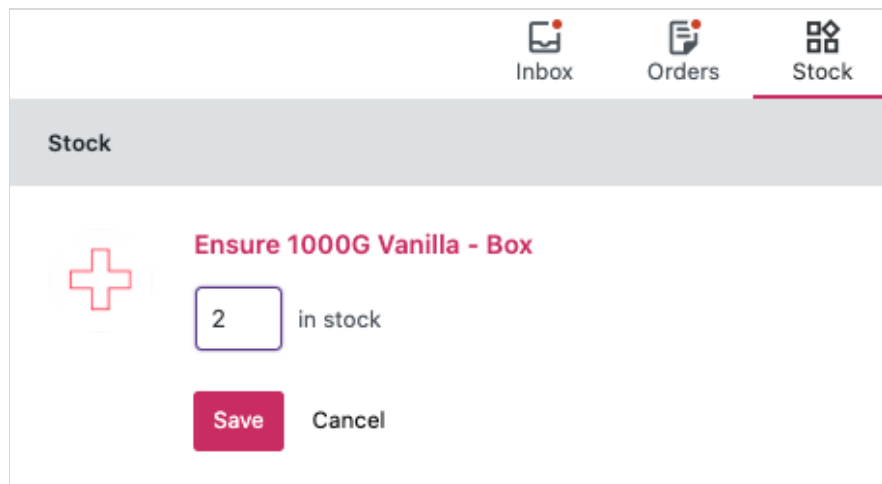
Stock

The stock tab easily lets you see which items are low on stock and you can even choose to update your stock count directly from this window.

Orders

When you head to the orders tab, the 'Screen Options' at the top right corner determines which data columns you see for your orders.

	Order	Date	Status	Ship to	Total	Actions
☐	#1140 Test User Two w/o landmark ✈	15 hours ago	Processing	Test House Two, Test Road Two, Test Island Two *via Flat rate*	MVR96.04	⌄
☐	#1138 Test User Two ✈	16 hours ago	Processing	Test House, Test Road diff, This is another landmark, Test Island diff *via Flat rate*	MVR63.02	⌄
☐	#1137 Test User ✈	16 hours ago	Processing	Test House, Test Road, Test Island *via Flat rate*	MVR110.00	⌄
☐	#1125 Adam Shamoon ✈	11 Jun 2020	Processing	Adam Shamoon, Life Support, Majeedhee Magu, 7th Floor, Male', Maldives, 202020 *via Flat rate*	MVR110.00	⌄

Once you are ready to process the order, or perform a task on the order such as adding a note, you can click on the order to get to the details page. From there, you can change the status of the order, or even capture your payment manually using notes.

Get a detailed breakdown of Woocommerce order functions here.

Order #1138 details
Payment via Cash on delivery. Customer IP: 69.94.82.117

General

Date created:
2020-06-13 @ 05 : 42

Status:
Processing ⌄
- Pending payment
- **Processing**
- On hold
- Completed
- Cancelled
- Refunded

SKU: 103915

Billing

Test User Two
Test House Two, Test Road Two
This is a landmark
Test Island Two

Email address:
yasmeen@yeystudio.com

Phone:
+9607777777

ill (En)

Order notes ▲

Payment to be made upon delivery. Order status changed from Pending payment to Processing.
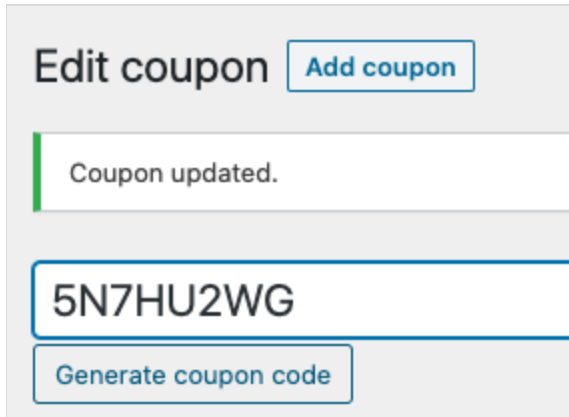
June 13, 2020 at 05:42 Delete note

Add note ❓
Payment received
Transaction ID: xxx xxxx xxxx
Received by: Staff Name
Date: 13 June 2020
Amount: 63.02 MVR

✓ Private note
Note to customer

Add

If your customer signed up with an email, you can also resend the email with the order details from this page.

Coupons

Coupons are a great way for you to market your products. You can apply a variety of conditions to allow customers to get a discount when they check out.
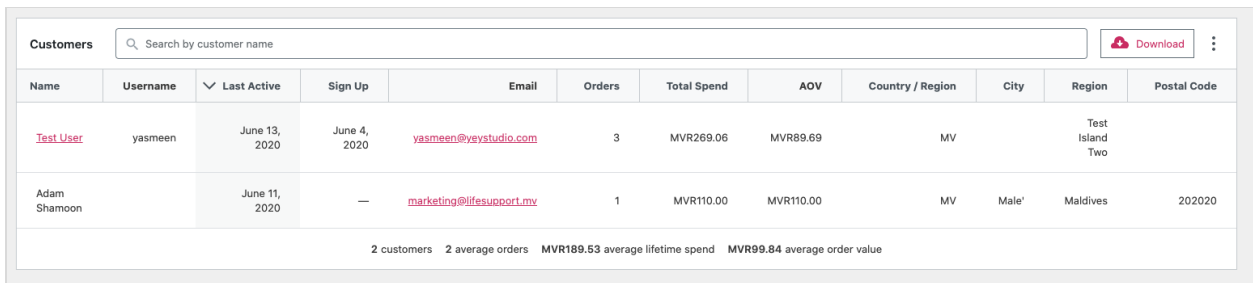

Coupons can be generated as much as you like and posted on your social media to engage your customers. You can also have set expiry dates on them.

Customers

Your customer database helps you to reward frequent customers or send marketing materials and sale notifications to your current customers. You can download a CSV file of all your customers which includes all the details they shared while creating an account or making an order.

Name	Username	Last Active	Sign Up	Email	Orders	Total Spend	AOV	Country / Region	City	Region	Postal Code
Test User	yasmeen	June 13, 2020	June 4, 2020	yasmeen@yeystudio.com	3	MVR269.06	MVR89.69	MV		Test Island Two	
Adam Shamoon		June 11, 2020	—	marketing@lifesupport.mv	1	MVR110.00	MVR110.00	MV	Male'	Maldives	202020

2 customers   2 average orders   **MVR189.53** average lifetime spend   **MVR99.84** average order value

Reports

Woocommerce reports are a great way for you to understand how your store is performing. The visual graphs along with the data gives you a complete overview of your sales, which you can also filter by date. You can also export this data as a CSV.
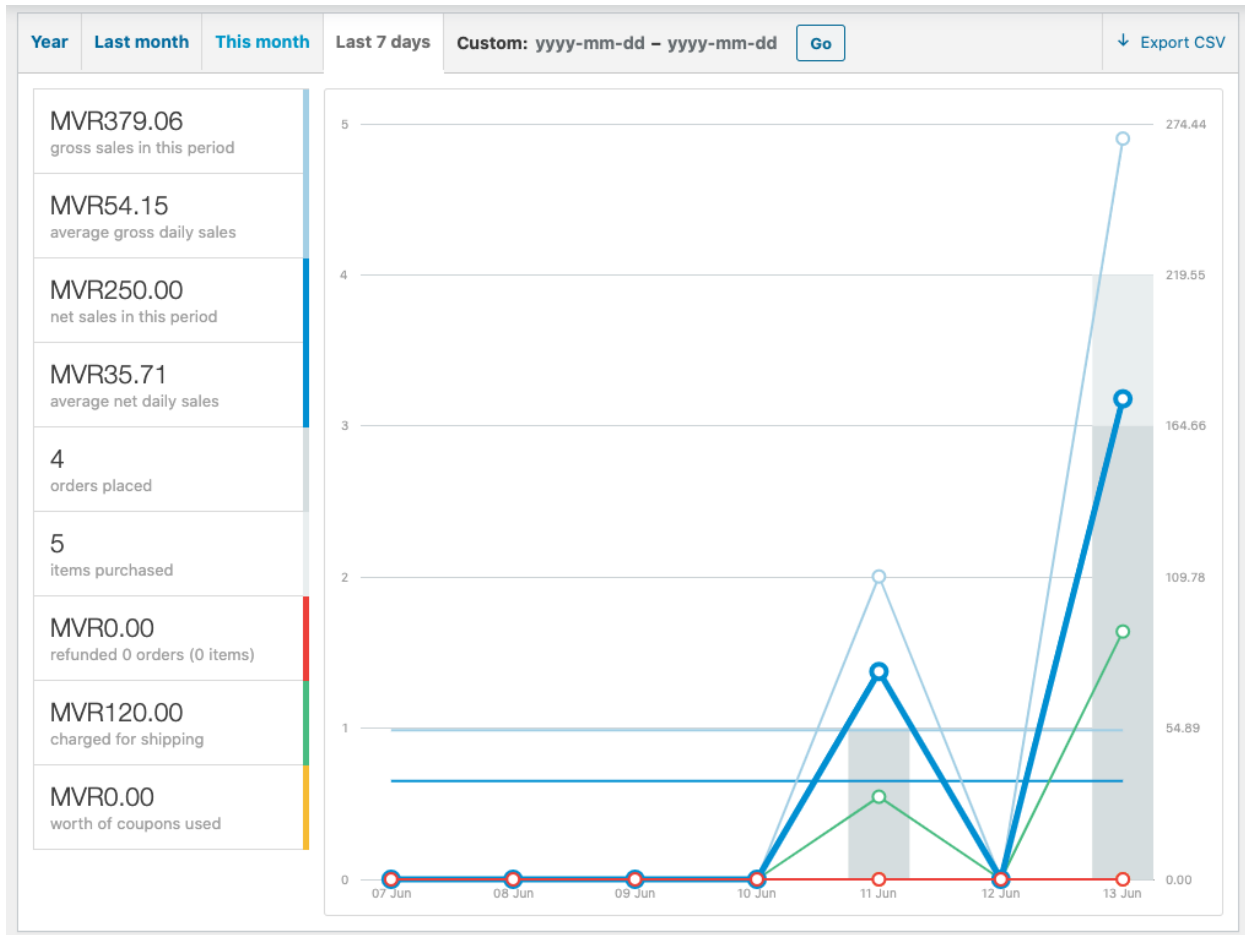
# ADDING PRODUCTS

Introduction

WooCommerce allows you to add or edit products either manually or by uploading a CSV file. Generally, if you have a lot of products you would want to opt for uploading a CSV. However, if you just need to alter minor details, you can always use the product editor. If you are editing products that are already on your store, it is best practice to export your products, make the changes that you want to and then import them. This is so that you don't accidentally upload duplicates.

Adding Products Manually

When you want to add a few products or make minor changes, you can head on over to Products on the Wordpress dashboard and click 'add new' or click on the product you wish to edit.
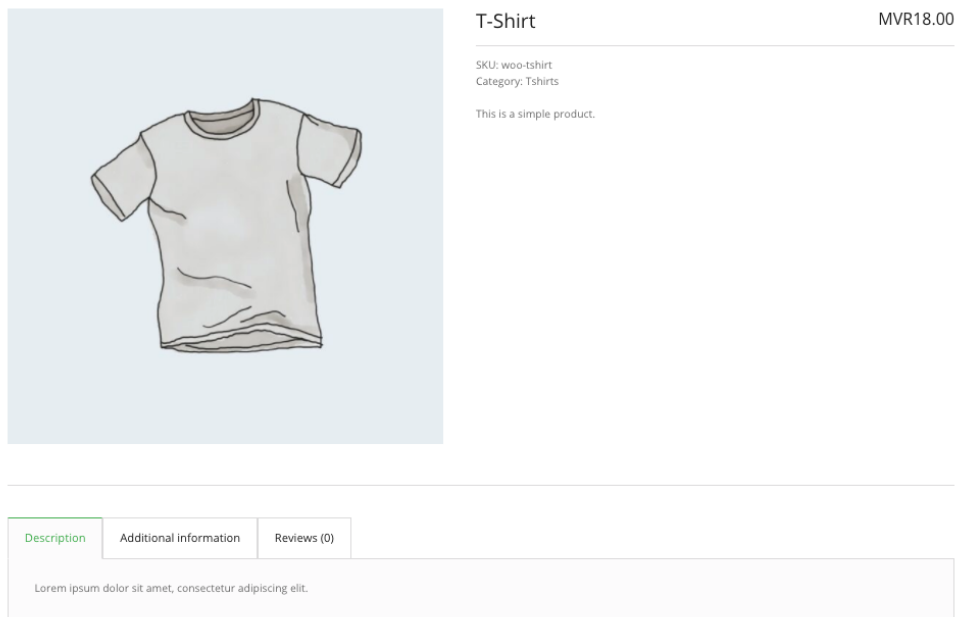

This is generally what a product will look like in your store. You need to make sure that you add the product's name, price, long-tail and short-tail description as well as any other relevant information such as SKU, categories, dimensions etc.
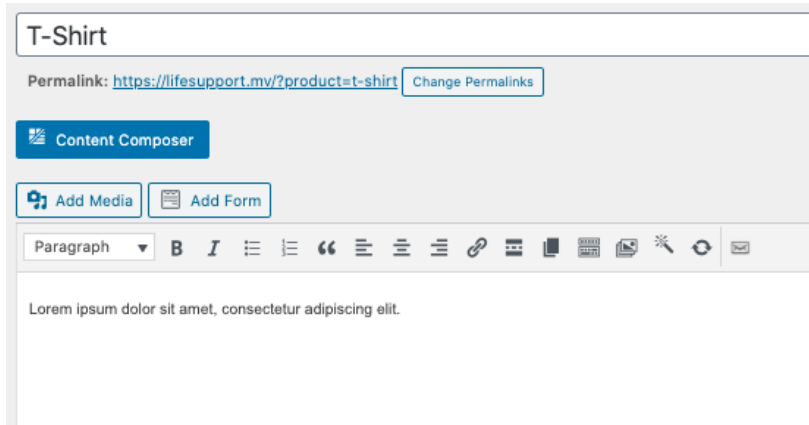
The first thing you need to add is a product name. Make sure it is one that your customers will understand easily.

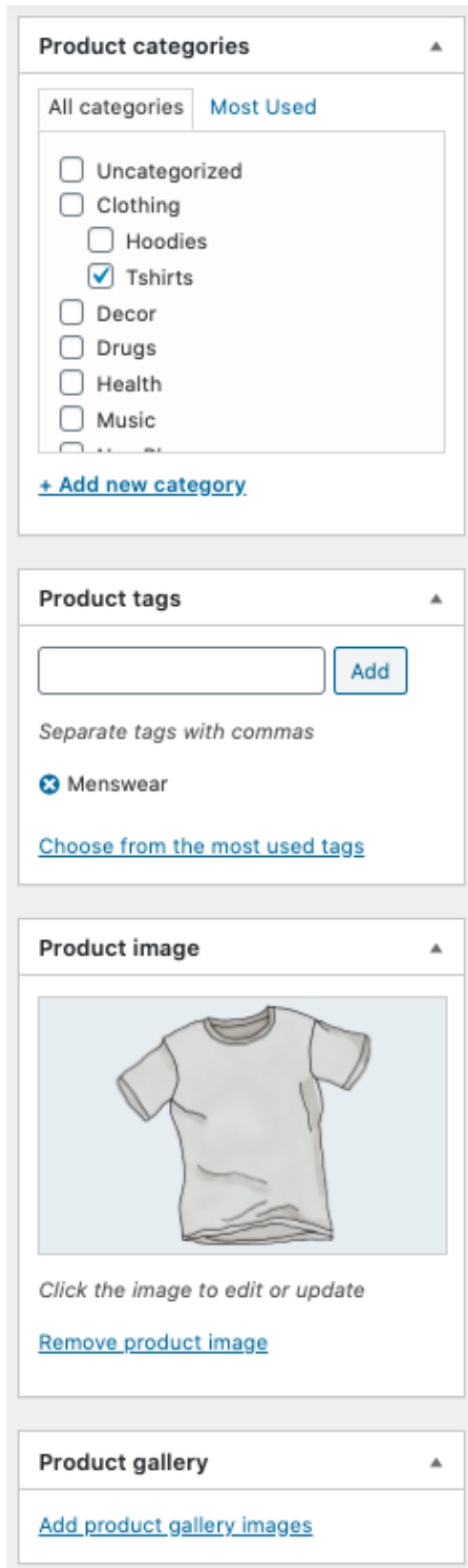The description right below the name is your long-tail description and while this is at the top of the page here, on your actual product page, this description will appear at the bottom.
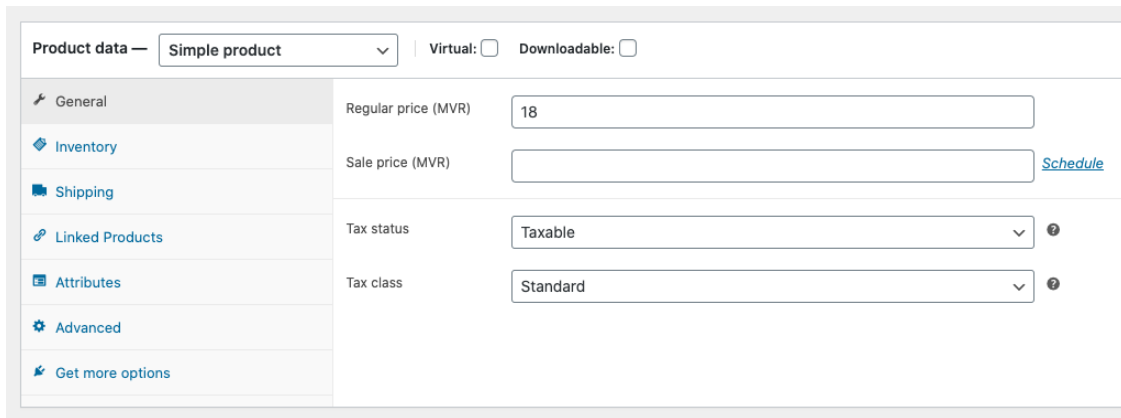
When you scroll down, you will see tabs using which you can add a variety of information for your product. You can see a breakdown of those items here.
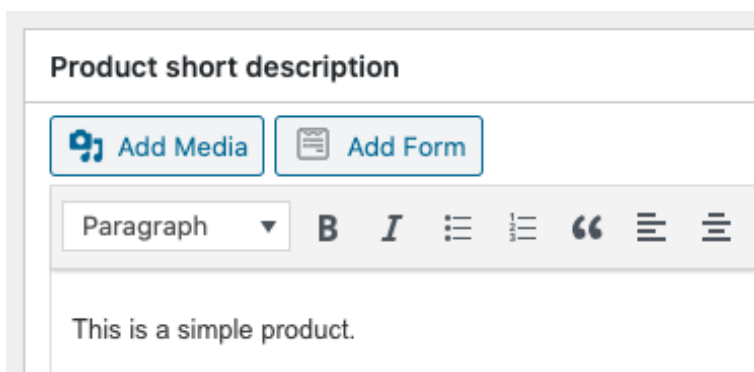
Below that section, you will see the short-tail description. This is what customers will see to the right of your product image. Since this is a prominent spot you may want to include the most important information here.

Product categories ▲

All categories | Most Used

- ☐ Uncategorized
- ☐ Clothing
  - ☐ Hoodies
  - ☑ Tshirts
- ☐ Decor
- ☐ Drugs
- ☐ Health
- ☐ Music

+ Add new category

Categories can help you organize your products and let your customers find what they are looking for. As you can see here you can set a main category that gets followed by subcategories, but this is entirely dependent on the needs of each store. If you can limit your categories to be three levels deep, it would generally be easier to maintain and also use within the website.

Product tags ▲

[   ] Add

Separate tags with commas

❌ Menswear

Choose from the most used tags

Product tags will also enable your customers to easily find the products that they are looking for.

Product image ▲

Click the image to edit or update

Remove product image

This is where your main product image will do. Make sure that your images are of a reasonable size so that they do not pixelate on larger screens. A consistent shape and size of images across your website will make it look clean. 640 x 640 is a good size for product images. You can also export them as JPEGs since they provide the best quality for the smallest file size.

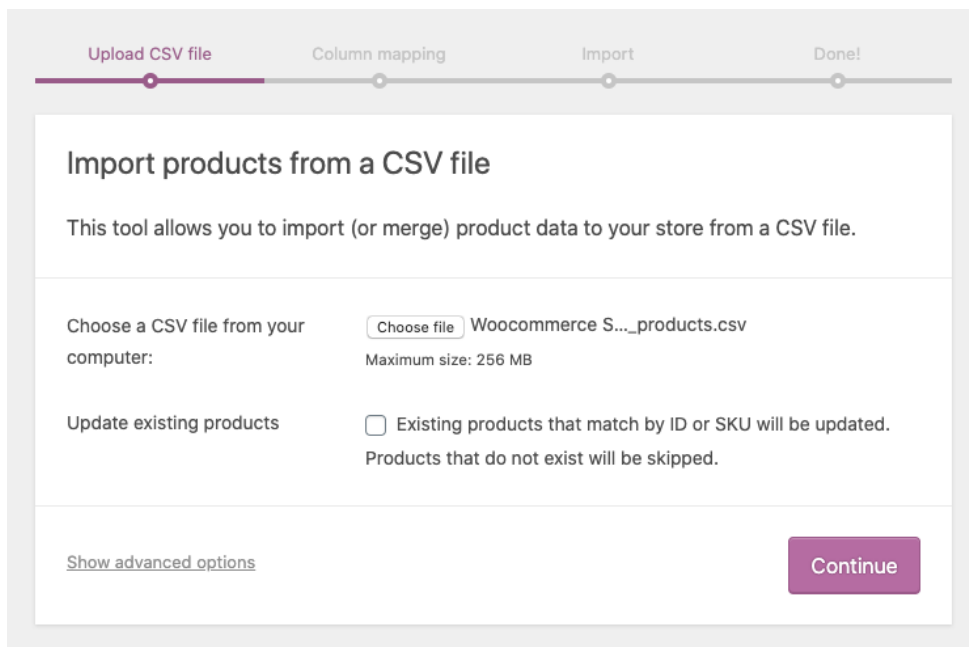**Product gallery** ▲

Add product gallery images

The product gallery is where the rest of the images go. If you have variants or different angles you might want to include more pictures so your customers have a better frame of reference.

Adding Products Using a CSV

In order to do an easy import of all your products, you can bulk upload your products in the form of a [CSV sheet](). You can view a sample sheet here which shows you how different products can be uploaded on a single sheet. You can click on File → Download → Comma-separated values to get a CSV copy of the sheet. Please make sure that it's a CSV file and not any other format such as .xlsx or else you won't be able to import it.

Since you will need to link your product images on the sheet, you must first upload your product images. To do this head to Media on your Wordpress dashboard and click on 'add new'. Once you've selected all your images, you can upload them in bulk. If you go to your library and change the view to list, you can right click on the images to get their links.

Once you have your sheet ready, you can head over to Products on your dashboard and at the top you'll see the Import button (it might take a little while for the button to load). Importing the CSV file is a pretty simple four step process.


Once you select your CSV file, press continue. If you are editing products that are already in your store, you need to click on the check box next to 'update existing products'.

Mapping your products allows you to check if the fields you completed on your CSV sheet are getting properly picked up by the importer. If any of the fields say 'do not import' check to see if it's information that you had not included in your CSV file. If you had included it and it still says 'do not import', click on the dropdown and choose the field where that information is located. Once all your fields have been verified, proceed to the next step.

Once your products have been uploaded, you will be taken to the next step, where you can see the number of uploaded products.
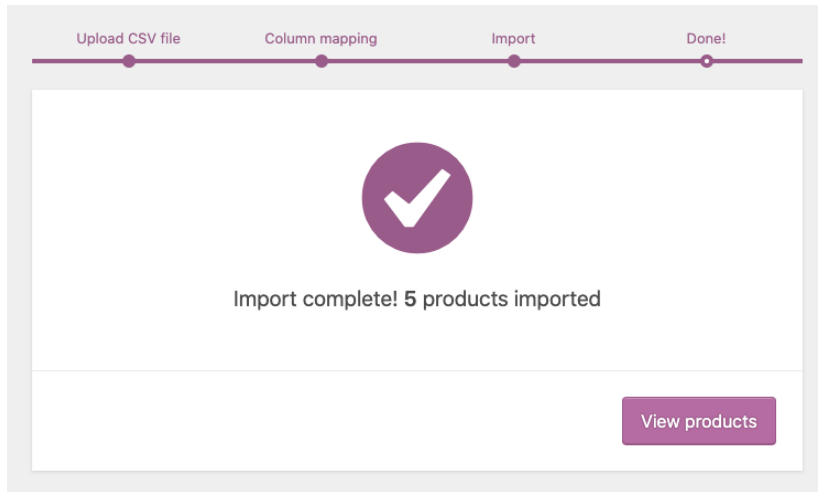
Once the process is complete, you can view your products to make sure that everything is as you want it to be.

Please note that if you have variable products you must first upload the parent items individually. This is because Woocommerce generates a unique ID for each product and you need to link back to this ID as you import the variables.