



# MOZU ADMIN GENERAL SETTINGS

## Getting Started Guide

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## Getting Started with Mozu Admin General Settings

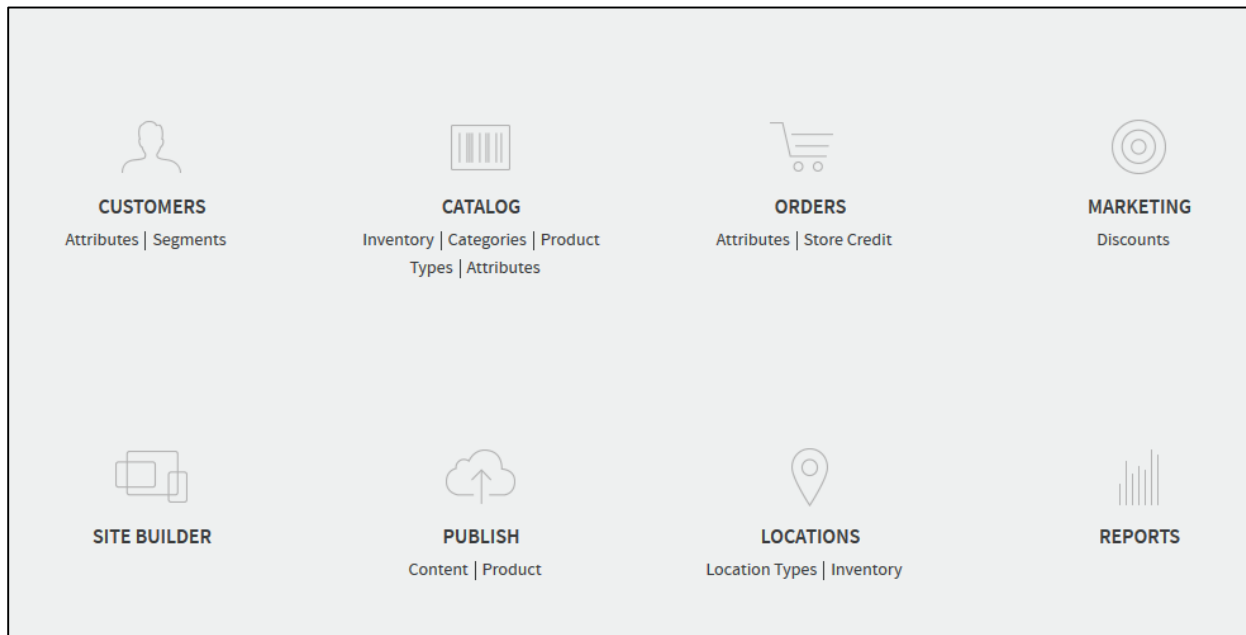
After you receive your Mozu Admin log in credentials, the next step is to configure your General Settings. Before we begin, here's some context of where Mozu Admin is within the Mozu platform.

### What is Mozu?

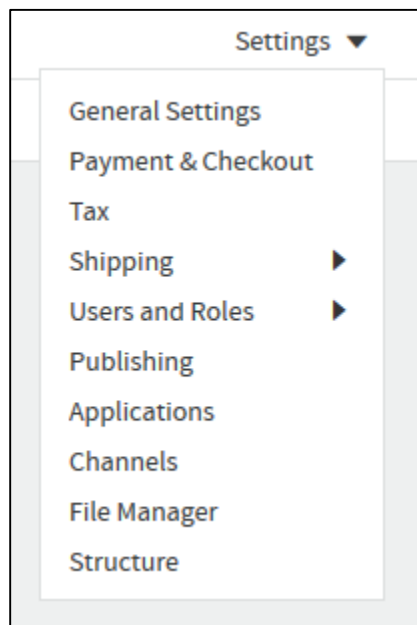
Mozu is an enterprise commerce platform giving you the power to manage your commerce, content, and customer experience across every channel on any device around the world. It's built with an API-first approach that enables limitless customization and extensibility.

### What is Mozu Admin?

Mozu Admin is a multi-tenant Mozu administrative web application where you manage the following aspects of your business:



Before you work with the Mozu modules, you need to configure the overall settings. The decisions you make in these settings affect the modules.



To configure Mozu Admin, you follow this workflow:

1. [Create Channels](#)
2. [Create Locations](#)
3. [Configure General Settings](#)
4. [Configure Shipping Settings](#)
5. [Configure Payment and Checkout](#)
6. [Configure Tax Settings](#)
7. [Configure Catalog Structure](#)
8. [Create Users and Roles](#)
9. [Configure Publishing Settings](#)
10. [Enable or Disable Applications](#)
11. [Use File Manager](#)

## Step 1: Create Channels

What are channels? Mozu Admin uses channels to distinguish where orders originate. In your business, you may have a mix of orders that originate from a retail location, an online site, or through other sites, such as Ebay. Defining these different channels helps you determine where an order comes from when you view it within the Orders module and also when you view details about your business in the Reporting module.

To create a channel:

1. In Mozu Admin, select **Settings>Channels**.
2. Click **Create New Channel**.
3. Enter a code and name and select a country for your channel.
4. Click **Save**.

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## CHANNEL EXAMPLE

Brenda needs to configure Mozu Admin for her company, MysticSports. Her business includes retail kiosks across the United States and an online store, MysticSports.com.

She creates the following channels:

Channels				Create New Channel
Code	Name	Country	+	
MS-Kiosk	Mystic Sports Kiosk	US		
MS-Online	Mystic Sports Online	US		

## Step 2: Create Locations

What are locations? Mozu Admin uses location types and locations to define any geographical address where you sell products, fulfill orders, or both. In your business, you may have a mix of warehouses, retail stores, and kiosks. Defining these different types of locations helps you manage your inventory.

### CREATE A LOCATION TYPE

1. Define all the different types of areas your business stores inventory.
2. In Mozu Admin, click **Locations**.
3. Click **Location Types** and **Create New Location Type**.
4. Enter a code and name for your location.
5. Click **Save**. Now you can associate your business's physical locations with these types that you defined.

## LOCATION TYPE EXAMPLE

Brenda's business includes warehouses and retail kiosks that store sporting goods inventory.

She creates the following location types:

Location Types		Create New Location Type
Code	Name	+
HQ	Headquarter Store	
Retail	Retail Store	
Warehouse	Warehouse	

## CREATE LOCATIONS

After you create location types, now you can enter your physical locations.

1. Define all your physical locations.
2. In Mozu Admin, click **Locations**.
3. Click **Create New Location**.
4. Enter your location details for each physical location.
5. Click **Save**.

## BEST PRACTICES FOR ENTERING LOCATION DETAILS

- You can select more than one location type if more than one type applies.
- You can select more than one fulfillment type if your location supports both direct ship and in-store pick up.
- Create a unique code for each location.
- Optional: Enter latitude and longitude in numerical format. Example: Latitude: 38.8897  
Longitude: 77.0089
- Select **Enabled** for the Supports Inventory Flag if this location can maintain inventory.
- Hours of Operation: Depending on your site's theme, you could expose this information to your shoppers.

## LOCATIONS EXAMPLE

Brenda's business includes a warehouse in Boston and retail stores in Austin and Vermont.

She creates the following locations:

Code	Name	Location Types	Address
AU	Central Austin Store	Retail Store	709 W 22nd St Austin, TX 78705 US
BU	Burlington Store	Retail Store	239 Maple St Burlington, VT 05401 US
BWH	Boston Warehouse	Warehouse	1010 Massachusetts Avenue 5th floor Boston, MA 02118 US

## Step 3: Configure General Settings

Select **Settings>>General Settings** to configure the channel, catalog, time zone, site email addresses, and site analytics.

The Web Site Name field can be accessed by your theme, as well as included on packing slips and printed orders.

Brenda makes the following edits for her company, MysticSports.

<b>General</b>	
Web Site Name	
MysticSports.Com	
* Time zone	* Time format
Central Standard Time	12 hour w/ leading zeros
* Channel	Catalog
Mystic Sports Online	MysticSports.Com
Moza Hosted Store Front	
Yes	
<b>Notifications</b>	
* Sender e-mail	
Product_Marketing@Mysti	

## Step 4: Configure Shipping Settings

Within **Settings>Shipping** you set up your zones, product rules, carriers, and methods and fees.

### SHIPPING ZONES

Shipping zones separate geographical locations into categories that commonly include the same shipping methods and rates. Creating shipping zones helps you more accurately manage shipping to different locations. Shipping zones are created by regular expressions, which are sequences of characters used for search patterns. Mozu includes pre-configured shipping zones, or you can create your own.

1. Select **Settings>Shipping>Zones**.
2. Use the Shipping Zones for drop-down menu to choose which site to apply the zones to.
3. For the existing zones, you can use the Grid action menu to edit or duplicate an existing zone. Mozu recommends editing or duplicating existing zones as a starting place for creating your own custom zones. Or, you can select **Create New Zone**.

4. Enter a Name, Description, and Expression to create the zone. Expressions are regular expressions executed against the destination address of a fulfillment.

Here is the Expression defined for North, Central, and South America:

Expression
CountryCode eq "US" or CountryCode eq "CA" or CountryCode eq "MX" or CountryCode eq "GT" or CountryCode eq "BZ" or CountryCode eq "SV" or CountryCode eq "HN" or CountryCode eq "NI" or CountryCode eq "CR" or CountryCode eq "PA" or CountryCode eq "BS" or CountryCode eq "CU" or CountryCode eq "JM" or CountryCode eq "HT" or CountryCode eq "DO" or CountryCode eq "VG" or CountryCode eq "KN" or CountryCode eq "AG" or CountryCode eq "DM" or CountryCode eq "LC" or CountryCode eq "VC" or CountryCode eq "GD" or CountryCode eq "BB" or CountryCode eq "TT" or CountryCode eq "AR" or CountryCode eq "BO" or CountryCode eq "BR" or CountryCode eq "CL" or CountryCode eq "CO" or CountryCode eq "EC" or CountryCode eq "GF" or CountryCode eq "GY" or CountryCode eq "PY" or CountryCode eq "PE" or CountryCode eq "SR" or CountryCode eq "UY" or CountryCode eq "VE" or CountryCode eq "FK"

## UNDERSTANDING SHIPPING ZONE EXPRESSIONS

Expressions are executed against the destination address of a fulfillment. The following properties may be used for destination address:

- CountryCode
- CityOrTown
- StateOrProvince
- PostalOrZipCode
- AddressType

Regular expressions use operators, and these operators are supported for shipping zones:

- CONT - Contains
- EQ - Equals
- GT - Greater Than
- IN - Contained In (Syntax: *Category.Id IN [23, 45, 53]*)
- LT - Less Than
- NE - NotEquals
- SW - StartsWith



## SHIPPING ZONE EXAMPLE

Brenda wants to create shipping zones for her sporting goods stores. She wants a zone for the lower 48 states and one specifically for all countries in South America.

* Name
MysticSports - Lower 48
Description
Lower 48 States of the US
Expression
CountryCode eq "US" and StateOrProvince ne "HI" and StateOrProvince ne "AK"

Brenda's South American shipping zones:

* Name
MysticSports - SA
Description
Includes all South American countries
Expression
CountryCode eq "AR" or CountryCode eq "BO" or CountryCode eq "BR" or CountryCode eq "CL" or CountryCode eq "CO" or CountryCode eq "EC" or CountryCode eq "GF" or CountryCode eq "GY" or CountryCode eq "PY" or CountryCode eq "PE" or CountryCode eq "SR" or CountryCode eq "UY" or CountryCode eq "VE"

## CREATE PRODUCT RULES

After you configure shipping zones, you can create product rules, which are regular expressions executed against various properties and nested properties under the product associated with an order item. Product rules are optional, but they help you control shipping. For example, you might want to create a product rule for something that requires special shipping consideration, like perishable items, items that are very heavy, or items that you don't want to ship over a weekend. These rules help you manage shipping items that might require special types of shipping. You can create product rules for the following product properties:

- ProductCode
- ProductType
- Weight.Unit

- Weight.Value
- Length.Unit
- Length.Value
- Height.Unit
- Height.Value
- Category.Id
- Category

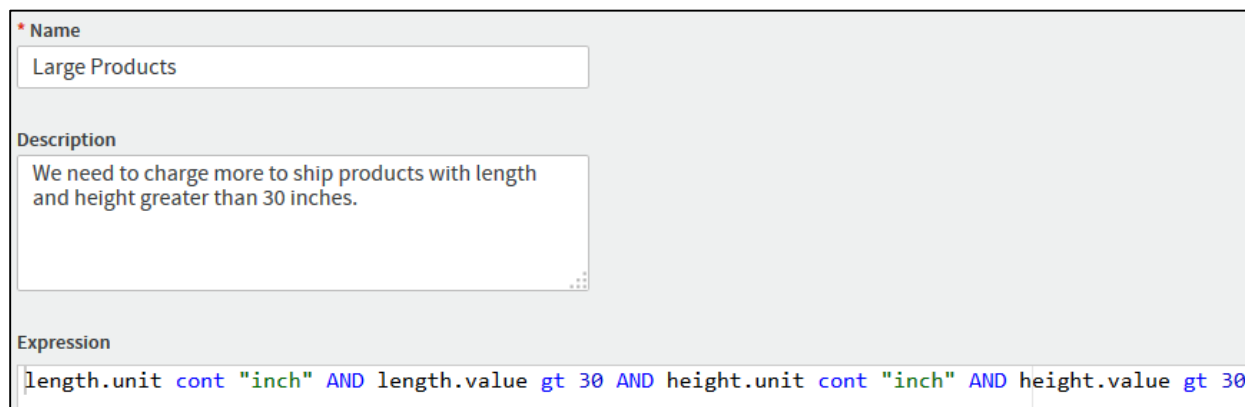
## CREATE A PRODUCT RULE

1. Select **Settings>Shipping>Product Rules**.
2. Select **Create New Product Rule**.
3. Enter a Name and Description. For example, you might enter Overweight, Products weighing more than 50 lbs.
4. Enter the following expression. For example, weight.value gt 50.

---

## PRODUCT RULE EXAMPLE

Brenda needs to charge more for shipping oversized sporting good products, like her line of canoes. She creates a new product rule for large products:



The screenshot shows a form for creating a product rule. It has three main sections: Name, Description, and Expression. The Name field contains 'Large Products'. The Description field contains 'We need to charge more to ship products with length and height greater than 30 inches.' The Expression field contains the code 'length.unit cont "inch" AND length.value gt 30 AND height.unit cont "inch" AND height.value gt 30'.

<b>* Name</b>
Large Products
<b>Description</b>
We need to charge more to ship products with length and height greater than 30 inches.
<b>Expression</b>
length.unit cont "inch" AND length.value gt 30 AND height.unit cont "inch" AND height.value gt 30

## CONFIGURE CARRIERS

In the Carriers section, you define your fulfillment options and your shipping methods and rates for each carrier you use. You select which location you are shipping from, whether the fulfillment is direct ship or in-store pick up, and the types of shipping rates you offer.

1. Select **Shipping>Carriers** to choose your fulfillment options.
2. Select **Create New Custom Rate** to add a new shipping rate.

## MYSTICSPORTS CARRIERS EXAMPLE

Brenda wants a flat shipping rate of \$15.00, so she creates a new custom rate:

### Edit Custom Rate

**\* Name**

**Custom Rate Type**

☐ Flat Rate Per Item
 ☐ Flat Rate Per Order
 ☐ Percentage of Order

**\* Amount**

## CONFIGURE METHODS AND FEES

After you create shipping zones, product rules, and carrier information, you can create your shipping methods, product fees, and order fees.

1. Select **Shipping>Methods and Fees**.
2. Select **Add New** to add these configurations.

## METHODS AND FEES EXAMPLE

Brenda needs a product handling fee for her Priority Mail packages. She chooses the following configuration:

<b>Shipping Zones</b>	
Americas <span>✕</span>	
<b>Product Rules</b>	
<b>Shipping Methods</b>	
Priority Mail <span>✕</span>	
<b>* Fee Type</b>	<b>Fee</b>
Flat Rate	15.00

## Step 5: Configure Payment and Checkout Settings

In this setting page, you configure how you want to process payments and checkout. What you need to know before configuring this page:

- What payment gateways do you use?
- What credit cards do you accept?
- Do you accept payment via PayPal Express?
- Do you accept payment via check?
- How do you process orders?

Mozu Admin supports the following methods of payment:

- Visa
- MasterCard
- American Express
- Discover
- PayPal Express
- Check by mail

To process orders, Mozu Admin offers the following options:

- Authorize and capture payment when the order is placed.
- Authorize when the order is place and capture payment when the order is shipped.
- Authorize and capture payment when the order is shipped.

## Step 6: Configure Tax Settings

When configuring tax, consider the following questions:

- Is your site tax exempt?
- Which states within the United States do you need to collect taxes from?

### ADD TAX SETTINGS

1. Select **Settings>Tax**.
2. In the Tax page, click **Tax Exempt** if your site is tax exempt.
3. If not, select where you need to charge tax from the **Collect Taxes For the Following States** drop-down menu.
4. Click **Save**.
5. Repeat these steps for each site by selecting each site from the context drop-down menu.

If you need additional tax settings, consider using the Avalara Application by Mozu, an application you can buy that integrates Mozu with Avalara's AvaTax software. Visit the [Configuration Guide](#) for more information.

## Step 7: Configure Catalog Structure

You must create catalogs before you can add products to them. These instructions explain how to create a Master catalog and Catalog. Refer to the *Getting Started with Mozu Catalog Guide* for information on setting up catalogs.

1. In Mozu Admin, select **Settings>Structure**.
2. On Catalog Structure, click **Create**.
3. Select the catalog type, enter in a name, and select the locale and currency codes. At this time, Mozu supports USD (US dollar) and US for locale.
4. If this is a catalog, select the Master Catalog to connect to the catalog.
5. Click **Save**.

## Step 8: Configure Users and Roles

Your ecommerce team may include individuals with domain expertise in marketing, inventory, etc., and they all need varying levels of access to Mozu Admin. Mozu Admin includes some predefined roles, which define the behaviors and permissions each user can take within the application. Or, you can create your own custom roles to better fit the needs of your organization. Think about what roles your team members fill as they do their work and how you want to reflect those positions within Mozu.

**Note:** Mozu includes some default Admin roles that you cannot change.

### CREATE A ROLE

1. Select **Settings>Users and Roles>Roles**.
2. In the Roles page, click **Create New Roles**.
3. Enter a name for the Role.
4. Click **Save**.

Now that you've defined your organization's roles, you can invite specific users to your account.

### INVITE A USER

1. Select **Settings>Users and Roles>Users**.
2. In the Users page, click **Add new User**.
3. Enter an email address and select the user's access level.
4. Click **Send Invite**.

Once the user accepts the email invitation, he or she can be working within Mozu Admin.

## Step 9: Configure Publishing Settings

You can publish products into your Master catalogs and content onto your site. You can choose to publish this information live as you add it, or you can stage the information until you are ready to publish. If you set the publishing mode to Pending, you can make draft changes to product definitions in the master catalog before publishing them in Live mode. In Pending mode, the system creates a draft version of all new and changed products. The draft version increments the product changes until they are approved and published or discarded.

1. Select **Settings>Publishing**.
2. Use the radio buttons to select **Live** or **Staged** for each item.

## Step 10: Enable or Disable Applications

Applications extend or replace existing Mozu functionality, such as the Avalara App by Mozu that replaces Mozu's tax functionality with Avalara's AvaTax functionality. After applications are installed on your tenant, they must be enabled in order to work. You enable and disable applications with this setting.

1. Select **Settings>Applications**.
2. Double-click the application you want to change from the list.
3. Click **Enable App** or **Disable App**.

## Step 11: Use File Manager

File Manager stores all files that you upload for use in your Mozu storefronts, such as product images. You can add files for use in any catalog, or as you add files in the product pages, they are automatically added to File Manager. You can quickly view file name, when the file was modified, etc., from the File Manager view.

To add and remove files:

1. Select **Settings>File Manager**.
2. Use the context switcher to select which site you want to add files to.
3. Click **Upload** and select the file from File Explorer.
4. To remove a file, select it from the list and click **Delete** from the Gear icon.