WooCommerce User Manual

A brief overview of the WooCommerce software.

An extension of WordPress to allow users build an eCommerse website from scratch or add shopping cart functionality to an existing website.

WooCommerce User Manual

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76 pages

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This manual teaches users about the WooCommerce plug-in within WordPress in order to understand its necessity and how it can be utilized when creating a web shop from shop setup to advanced features.

Overvi

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OBJECTIVES:

-Learn to manipulate and explore the WooCommerce tab with ease.

- Be able to add orders and customers then sort, put in, or modify all the details regarding them.

WooComm

1 WooCommerce Tab

1.1 Home

1.) Home is the tab that lets you see what is in your Inbox, Finish setup, and Stats overview.

1 WooCommerce Tab

2.) Your Inbox ahowa you notifications about your webstore with WooCommerce.

3.) Finish setup guides you to set up your web store.

4.) Stats overview breaks down the total sales and orders from today, week to date, and month to date.

5.) Clicking on **View detailed stats**, takes you to the Analytics Tab within the WooCommerce plugin.

WooComm

1 WooCommerce Tab

1.2 Orders

1.) If you click on **Add Order**, you are able to access the next page concerning the information about your order.
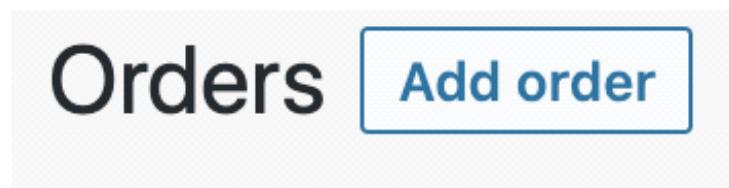
2.) You will be presented to the Add new order page where you can edit your new order.

1 WooCommerce Tab

3.) Under Order #XX details, You are able to see General, Billing, and Shipping.

4.) In General, you are able to edit the date created, status, and customer of your order.

5.) In Billing, you are able to edit the billing address as well as the payment method and transaction ID for your order. If you click on **Load billing address**, you are able to load existing customer information if it exists. Otherwise, information must be placed manually.

6.) In Shipping, you are able to edit the shipping address for your order. If you click on **Load shipping address**, you are able to load existing customer information if it exists. Otherwise, information must be placed manually. If you click on **Copy billing address**, It will copy the billing address information inputted from the billing.

1 WooCommerce Tab

7.) Below Order #XX details, you will see a table which takes to account your item, cost, quantity, and total.

Item	Cost	Qty	Total
		Items Subtotal:	₱0.00
		Order Total:	₱0.00

Add item(s) Apply coupon   Recalculate

8.) If you click on **Add item(s)**, it will show you options such as Add products, Add fee, Add shipping, Cancel, and Save.

Item	Cost	Qty	Total
		Items Subtotal:	₱0.00
		Order Total:	₱0.00

Add product(s) Add fee Add shipping Cancel Save

9.) If you click on **Add product(s)**, a new pop-up window can be accessed about your product.

Add products   ×

Product   Quantity

Search for a product...   1

Add

1 WooCommerce Tab

Add products

Product   Quantity

Search for a product... ⌄ | 1 |

Add

10.) Clicking on **Search for a product** will prompt the user to search for an existing product. New products cannot be created here.

Search for a product...   ⌄

| |

Please enter 3 or more characters

11.) Under quantity, you are able to edit the number of the existing item.

Quantity

| 1 | ▲▼

12.) Click **Add** to add the product.

13.) If you click on **Add Fee**, a new pop-up dialog can be accessed about your product.

WooComm

1 WooCommerce Tab

14.) By typing any number amount then pressing ok, it will add a fee to the item.

15.) By adding a percentage sign after the number then pressing ok, you are able to add an additional charge that is based off the original number amount input.

16.) If you hover your arrow to the bar that represents your item, you will see a pencil icon as well as an x.

1 WooCommerce Tab

17.) Click on the **pencil icon** and now you are able to edit your item name and your item total.

18.) Click on **Save** to keep the changes.

19.) Now you are presented with your updated table.

WooComm

1 WooCommerce Tab

19.) If you click again on **Add item(s)** then click on **Add shipping**, a shipping charge will be added on the table.
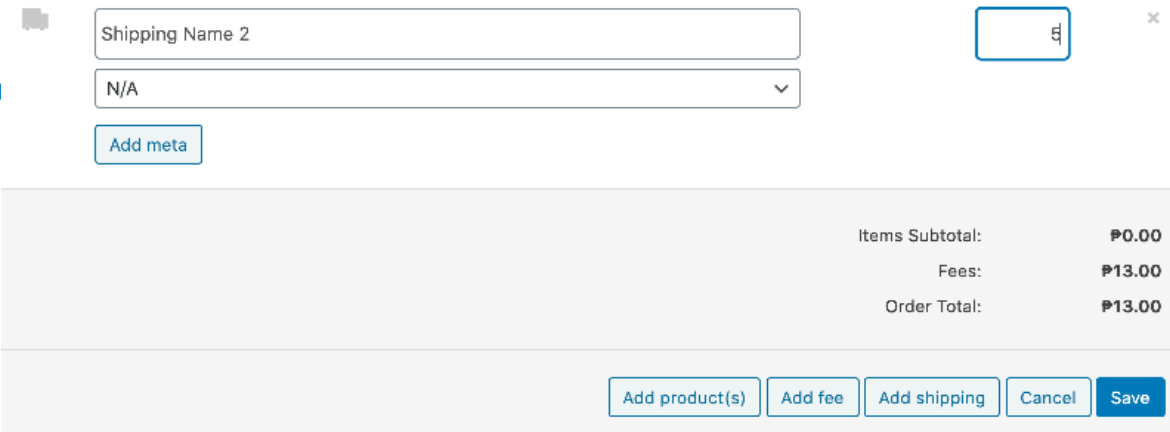

20.) If you hover your arrow to the bar that represents your shipping, you will see a pencil icon as well as an x.

21.) Click on the **pencil icon** and now you are able to edit your shipping name, shipping method and your shipping total.
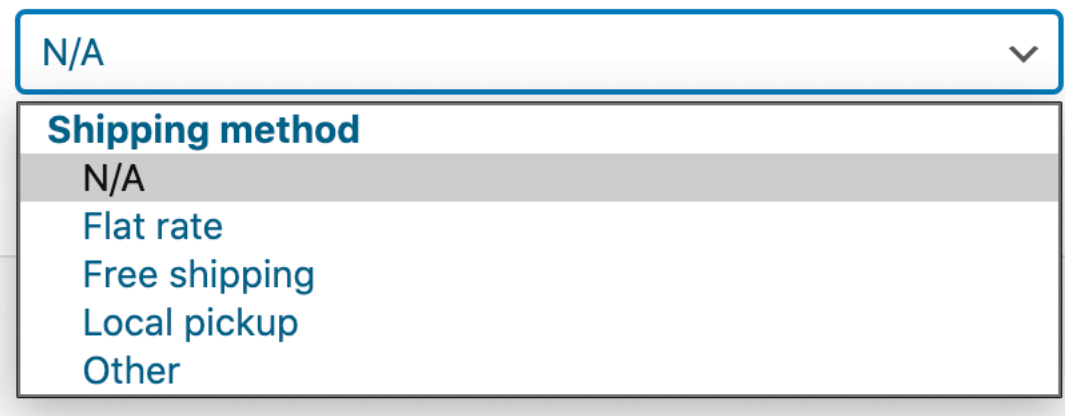
1 WooCommerce Tab

22.) Clicking on **N/A** under your shipping name will display different shipping methods for the user to choose from.

23.) Clicking on **Add meta** will open a name and value for additional information.

1 WooCommerce Tab

24.) Press the **x** if no additional information is needed.

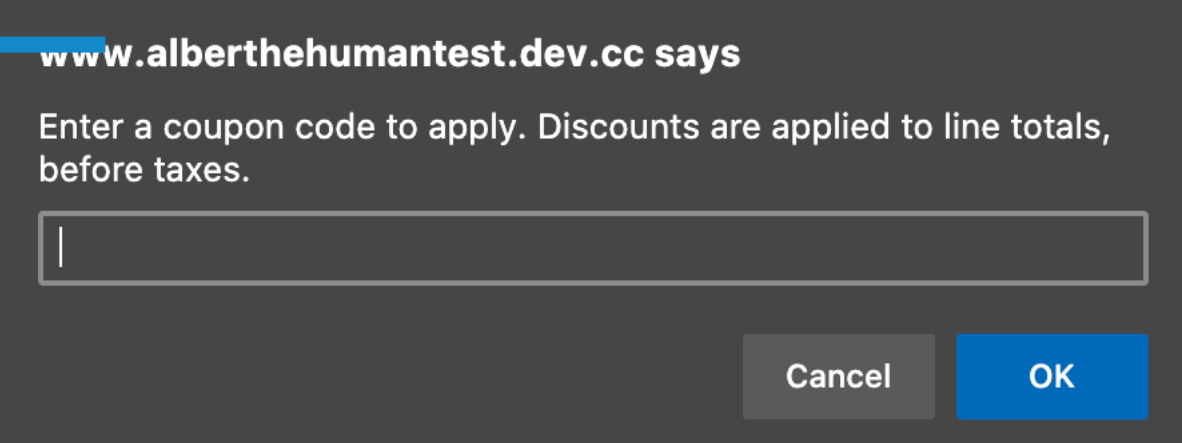**25.)** Click on **Save** to keep the changes.

26.) Now you are presented with your updated table.

1 WooCommerce Tab

27.) If you click on **Apply coupon**, a new pop-up dialog can be accessed about your order.
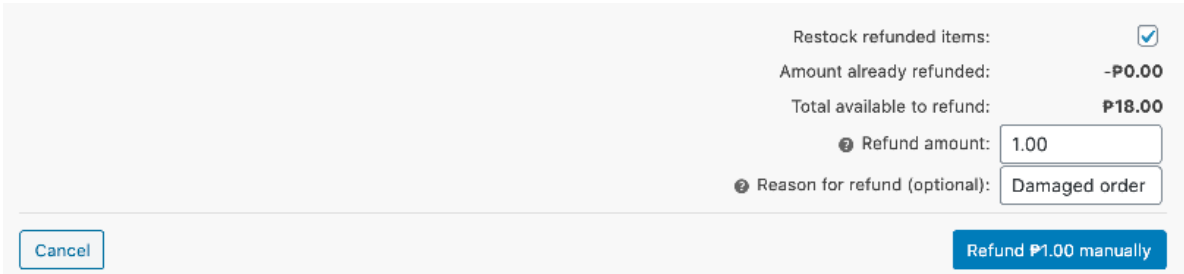
28.) By typing any combination of letters and numbers then pressing ok, it will add a coupon code to the item if the coupon code exists.

29.) Click on **OK** to confirm.

30.) If you click on **Refund**, you are able to see your refund options and now you are able to edit your Refund amount and Reason for refund which is optional.

1 WooCommerce Tab

31.) Clicking on the **check box of Restock refunded items**, indicates whether you wish to place refunded item back to stock.

32.) Amount already refunded shows the history of the amount that has been refunded from the order.

33.) Total available to refund gives your the amount that is able to be refunded with or without the order changes.

34.) Click on **Refund PXX.XX manually** to keep the changes.

35.) A new pop-up dialog will be accessed for your confirmation.
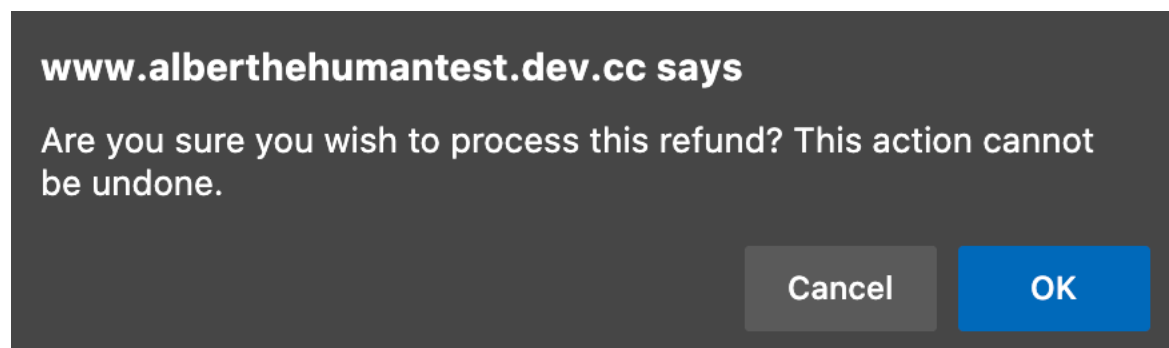
36.) Click on **OK** to confirm.

37.) Now you are presented with your updated table.

1 WooCommerce Tab

38.) If you click on **Recalculate**, a new pop-up dialog can be accessed about your order.

39.) Click on **OK** to confirm.

1 WooCommerce Tab

40.) Under Custom Fields, You are able add additional metadata for your orders.

Custom Fields

Add New Custom Field:

Name	Value
Product1	This is information.

Add Custom Field

Custom fields can be used to add extra metadata to a post that you can use in your theme.

41.) Clicking on **Add Custom Field** will add the metadata towards your post.

42.) Now you are presented with your updated table.

Custom Fields

Name	Value
Product1	This is information.

Delete   Update

Add New Custom Field:

Name	Value

Add Custom Field

Custom fields can be used to add extra metadata to a post that you can use in your theme.

1 WooCommerce Tab

43.) Clicking on **Delete** will erase your saved custom field.

44.) Clicking on **Update** will replace your custom field name and value with your new edit.

45.) Under Downloadable product permissions, you are able to search and grant access for downloadable product if exists.

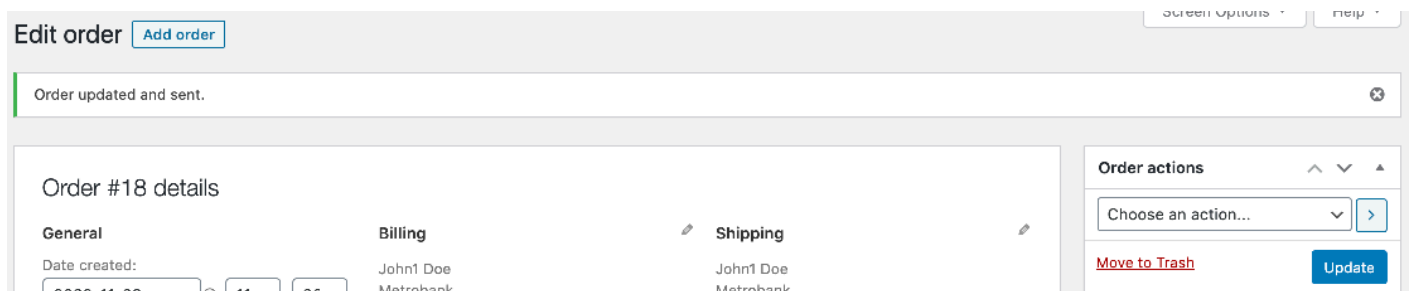46.) Under Order Actions, you are able to choose Email invoice / order details to customer, Resend new order notification, and Regenerate download permissions.

1 WooCommerce Tab

47.) Clicking on the side arrow pointing right or update will complete the process of your selected action with a page refresh and a notification at the top of the page upon reload.

48.) Under Order Notes, you are able to see the history of your order notes.
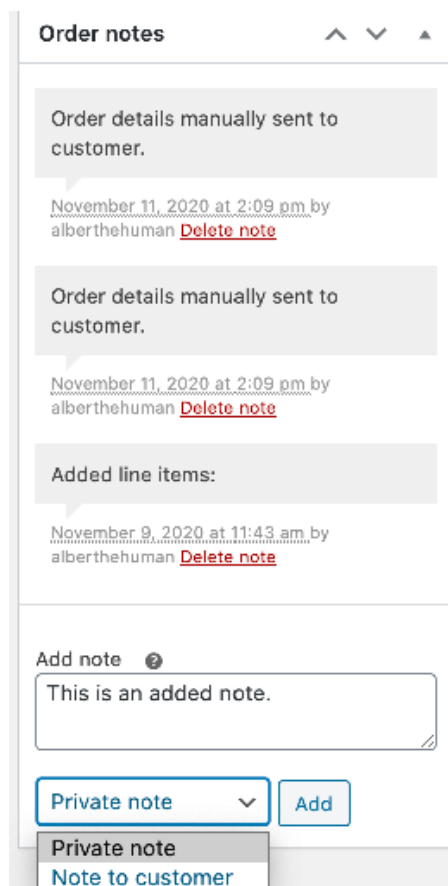
1 WooCommerce Tab

49.) After selecting the option whether you want to create a Private note or a Note to customer, click **Add** to update your table. If you decide to not add a new note. You may skip this step.

50.) Now you are presented with your updated table.
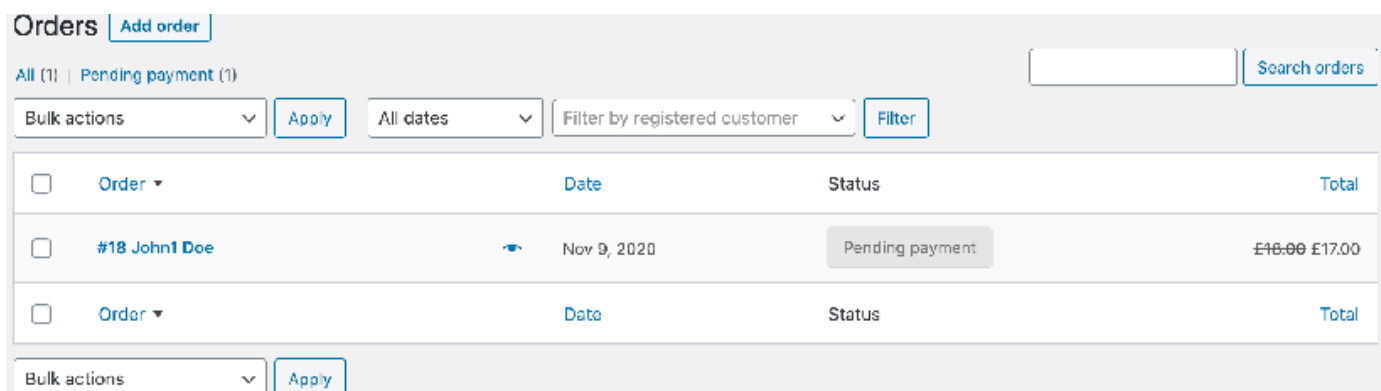
1 WooCommerce Tab
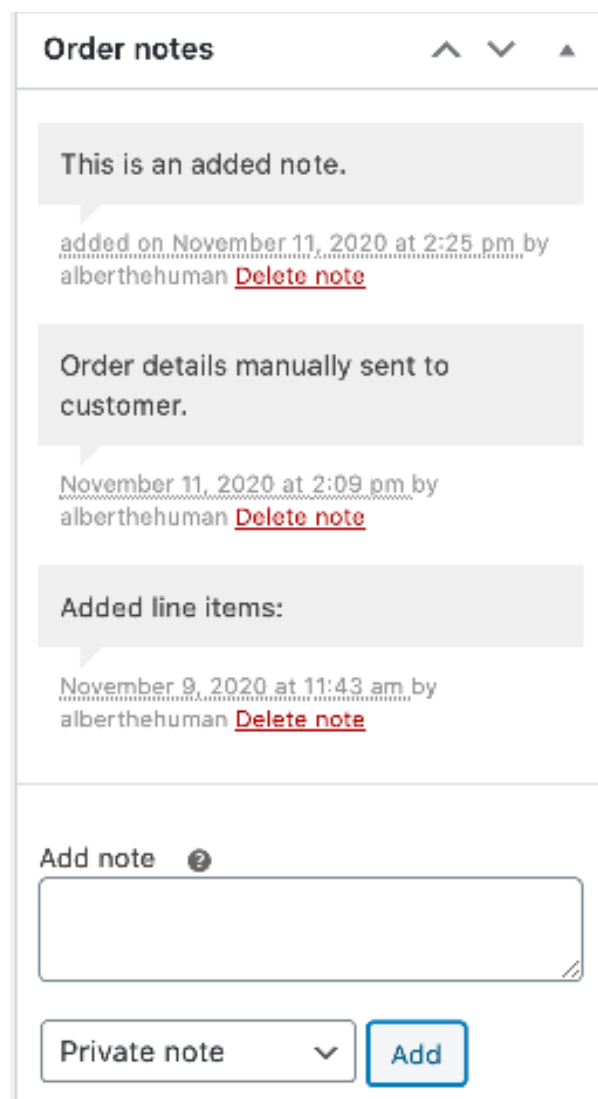
51.) If you click on **Orders** under the WooCommerce Tab again, you will be able to see all your existing orders along with ways to search, organize, and change status of your orders.

52.) Clicking on **Bulk actions** gives the option for your order to Move to Trash, Change status to processing, Change status to on-hold, or Change status to completed.
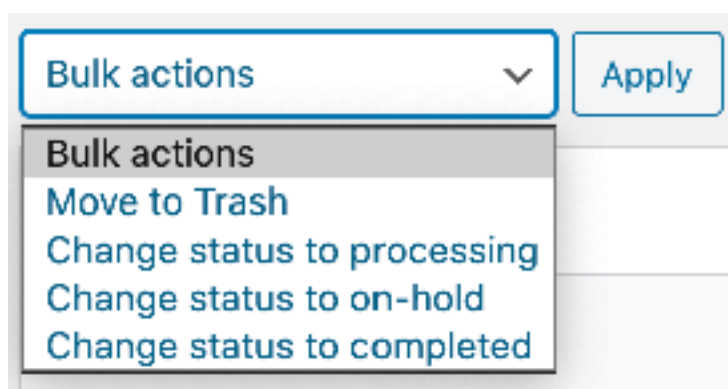
53.) Click on **Apply** to save changes.
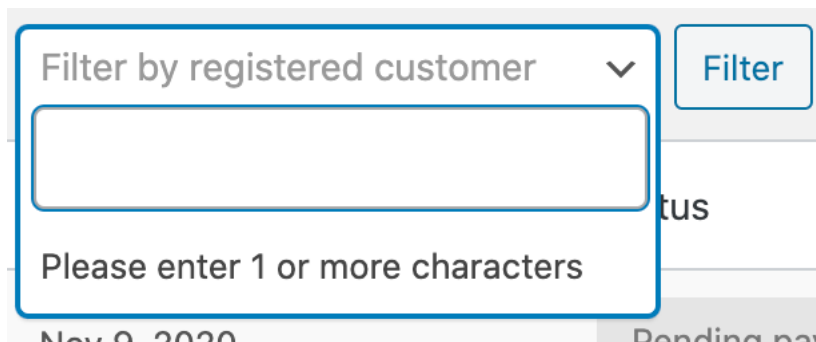
54.) If you click on **All dates**, it will show you the months and years of your order. You may select one to view your order that partook during that time.

1 WooCommerce Tab

All dates ⌄

All dates
November 2020

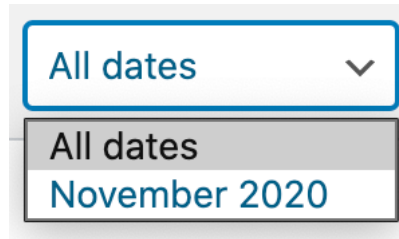55.) If you click on **Filter by registered customer**, you are able to enter the desired customer name who engaged in certain orders.

Filter by registered customer ⌄ | Filter

Please enter 1 or more characters

56.) Click on **Filter** to view the orders with specified customer.

57.) If you click on the **text box** next to Search orders, you are able to type in the desired order name to be shown.
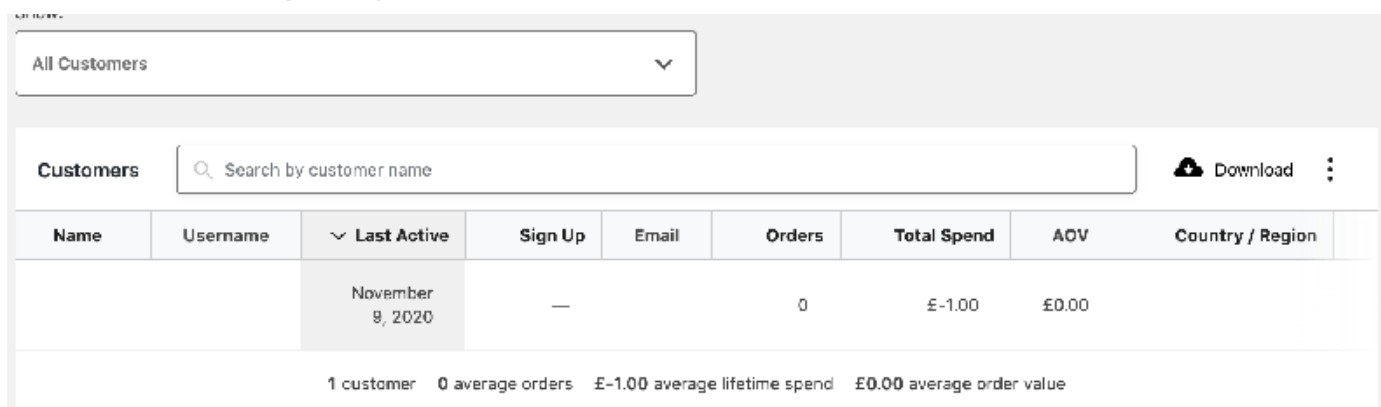
Search orders

58.) Click on **Search orders** to view the specified order.

WooComm

1 WooCommerce Tab

1.3 Customers

1.) In the Customers tab, you are able to view all customers and sort out existing customer transactions by Name to Country/Region.

2.) Clicking on the **All Customers** bar, will present you additional options regarding your customer search such as Single Customer and Advanced Filters.
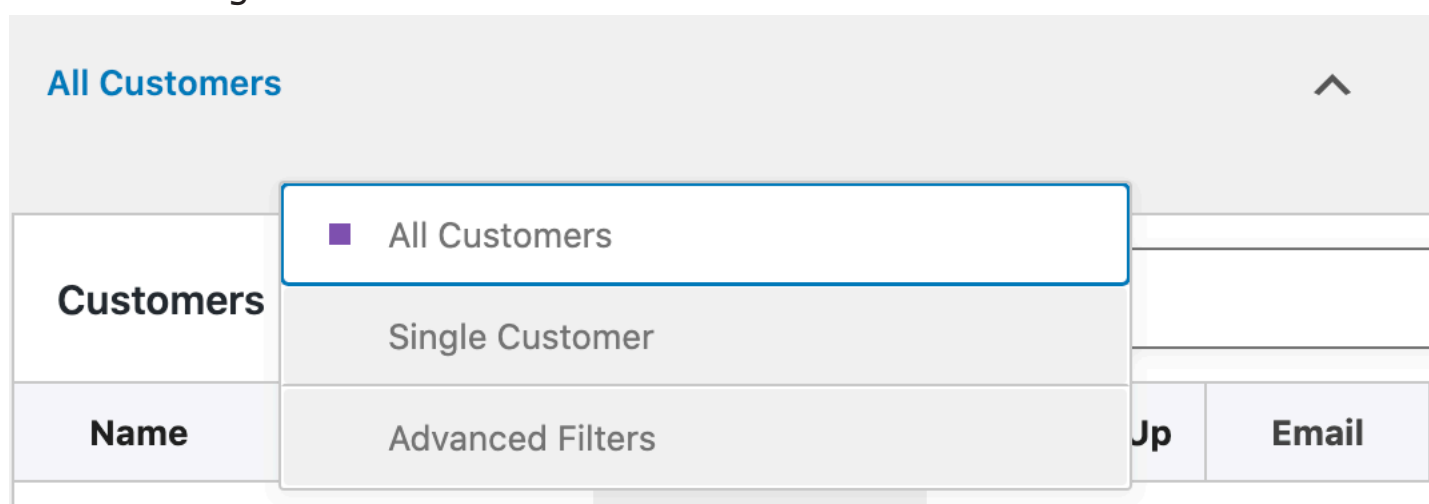
1 WooCommerce Tab

3.) If you click on the **Search by customer name** text box, you are able to input any customer name you desire to be shown.

Customers   🔍 Search by customer name

4.) If you click on the **Download** on at the right side, you are able to save an offline .csv file to your computer that serves as a customer report.

5.) If you click on the **three lined dots** on at the right side, you are able to add specific filters on your search.
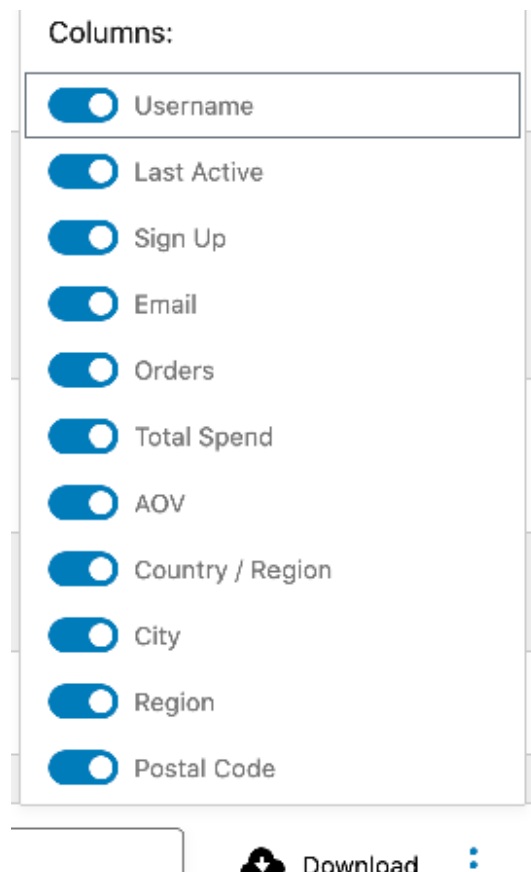
1 WooCommerce Tab

1.4 Coupons

1.) Refer to Coupons under Marketing Tab

1.5 Reports

1.) Under Orders, you are able to sort sales, coupons, and customer downloads with a time span of the year, last month, this month, the last 7 days, or a custom time period. You may also export a .csv file.
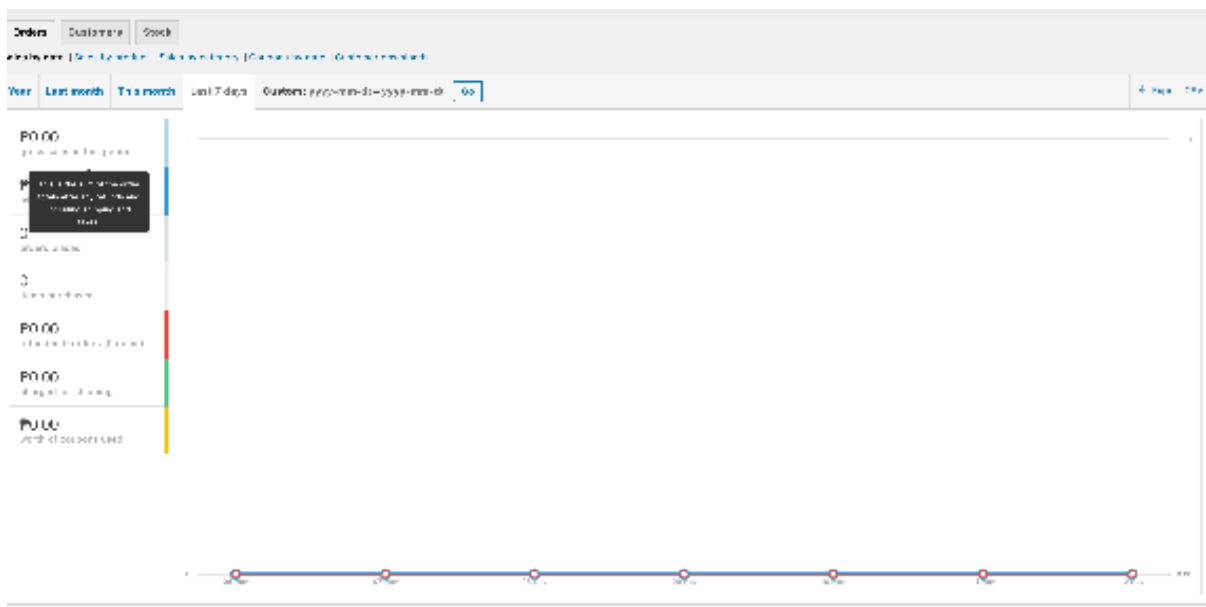
 2.) Under Customers, you are able to sort the customers with a time span of the year, last month, this month, the last 7 days, or a custom time period. You may also export a .csv file.

WooComm

1 WooCommerce Tab
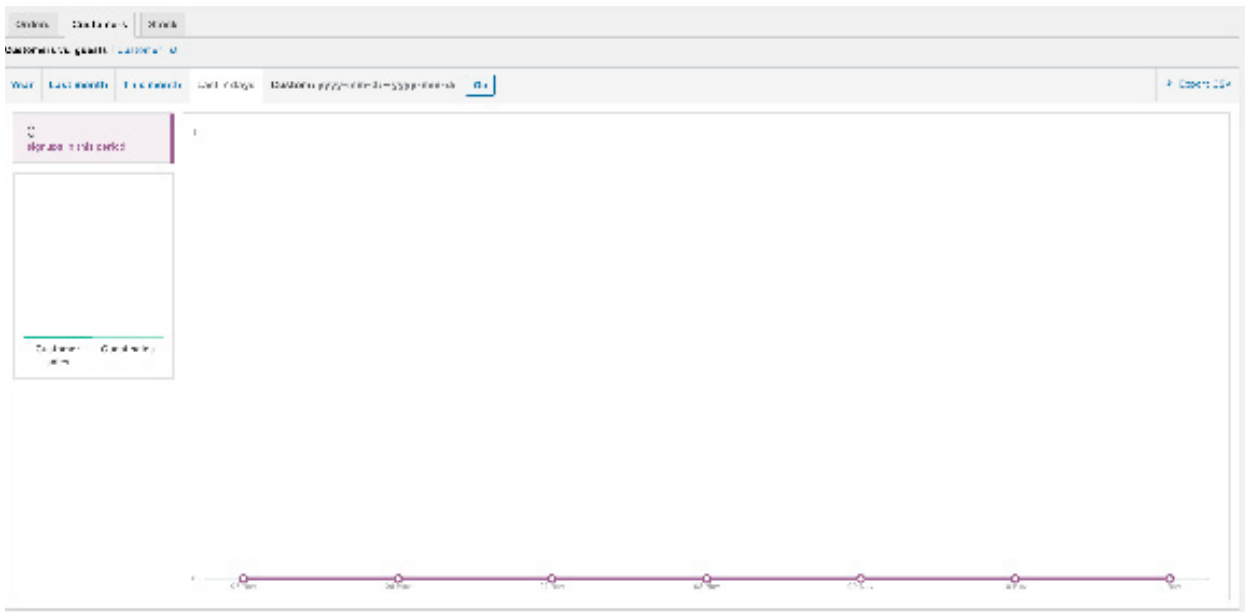
3.) Under Stocks, you are able to sort the stock by low, high, or most stocked.
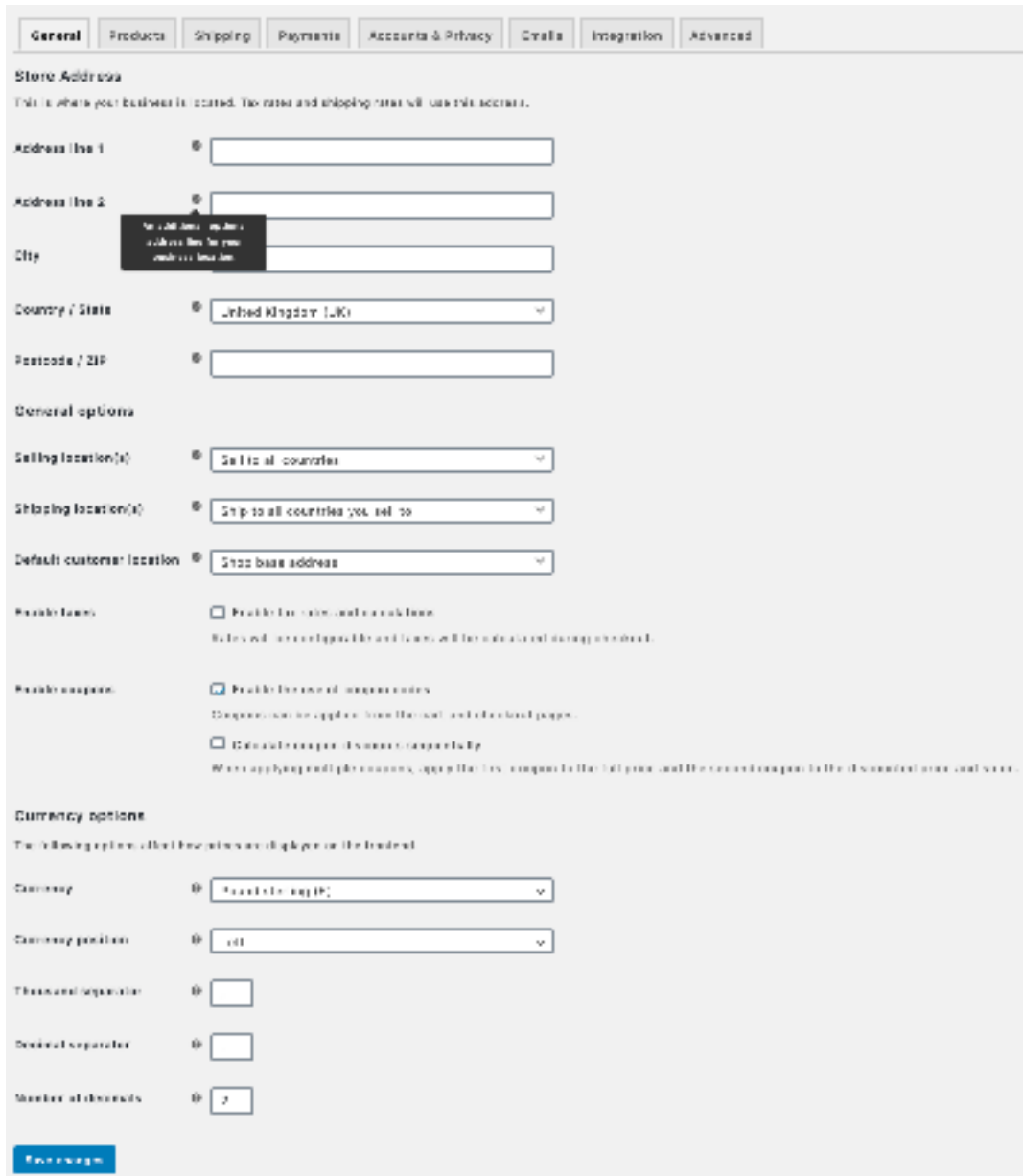
1.6 Settings

1.) Under General, you are able to input where your business is located.

WooComm

1 WooCommerce Tab

2.) Click on **Save changes** to confirm.

3.) Under Product, you are able to input product information.

1 WooCommerce Tab

4.) Click on **Save changes** to confirm.

5.) Under Shipping, you are able to add your on shipping zone.
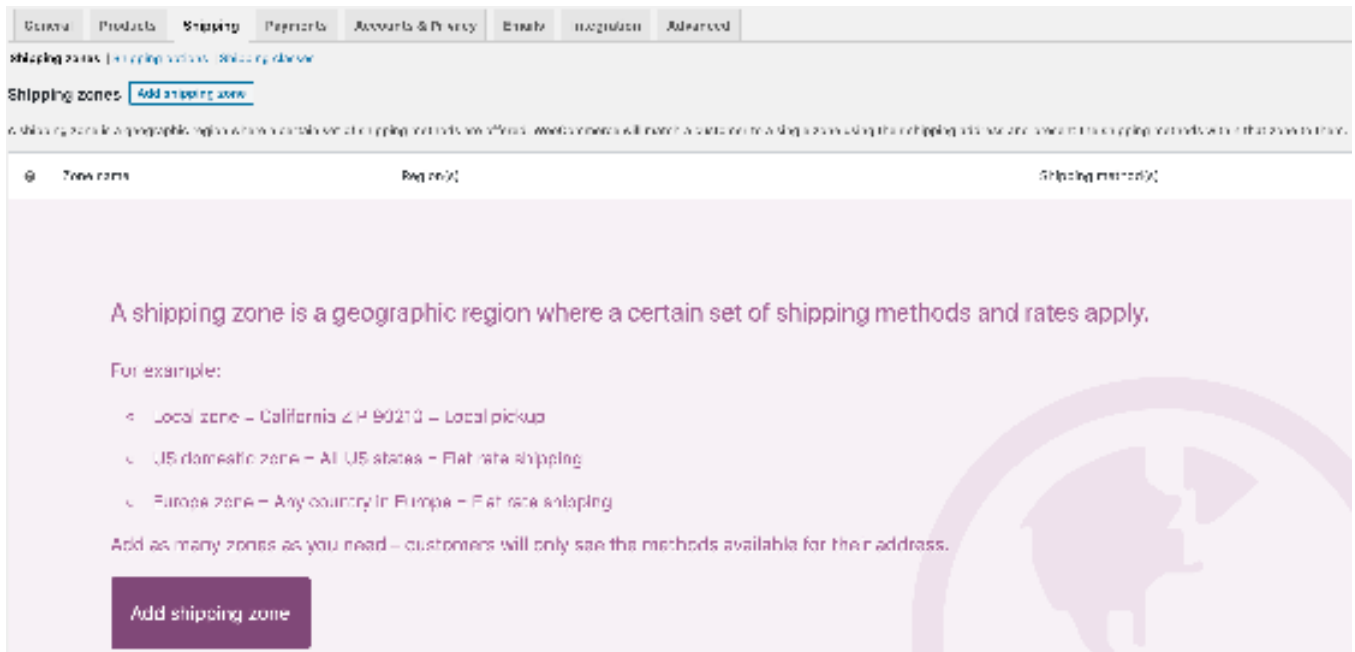
6.) If you click on Add shipping zone, you are able to add your information regarding your ship zone.
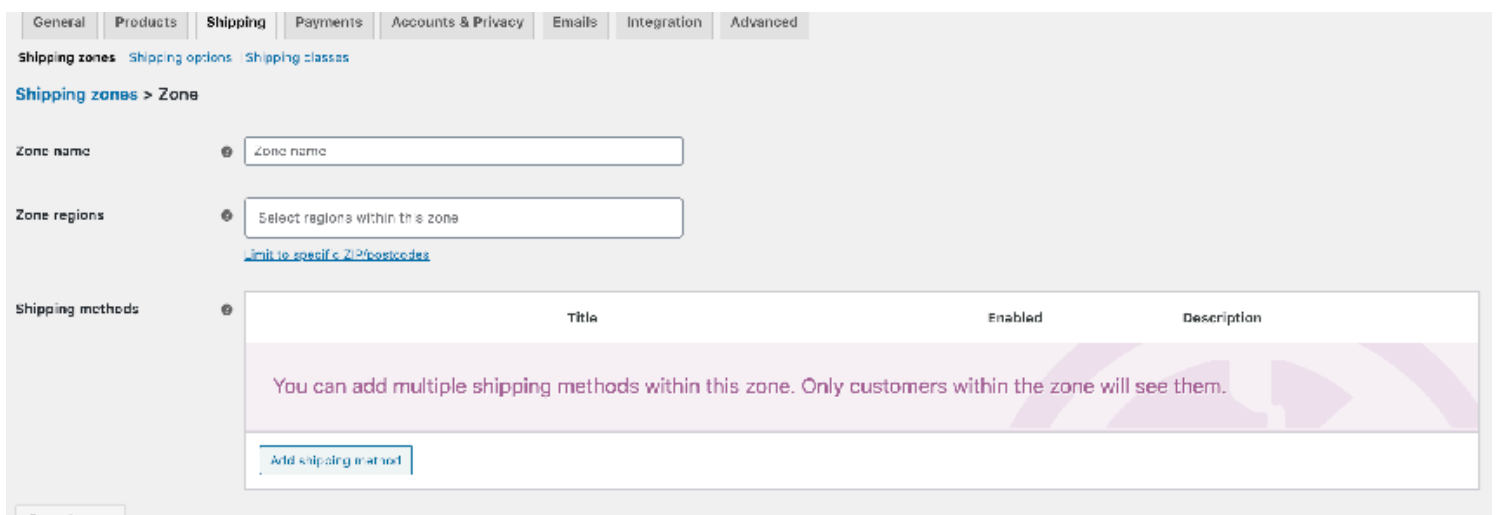
1 WooCommerce Tab

7.) Click on **Save changes** to confirm.

8.) Under Payments, you are able to sort, enable, and set up different ways for payment methods.

9.) Click on **Save changes** to confirm.

10.) Under Accounts and Privacy, you are able to edit your private data regarding your account.

1 WooCommerce Tab

11.) Click on **Save changes** to confirm.

12.) Under Emails, you are able control and configure email notifications.

1 WooCommerce Tab

13.) Click on **Save changes** to confirm.

14.) Under Integration, you are able activate country geolocation.

15.) Click on **Save changes** to confirm.

1 WooCommerce Tab

16.) Under Advanced, you are able to setup your web store regarding WooCommerce and more.

17.) Click on **Save changes** to confirm.

1 WooCommerce Tab

1.7 Status

1.) Go to WooCommerce » Status.
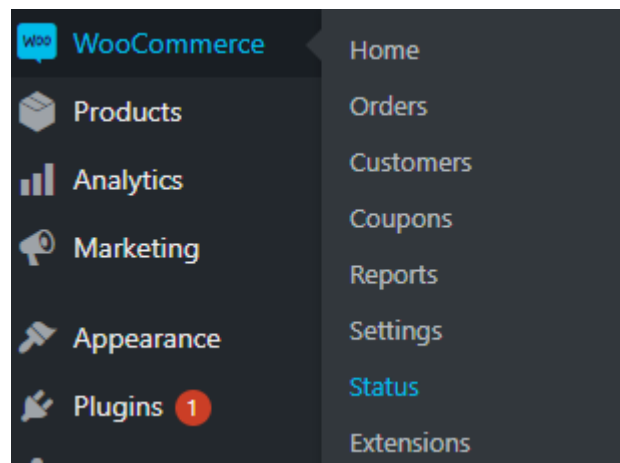
2.) After clicking the status, you will see the following display.
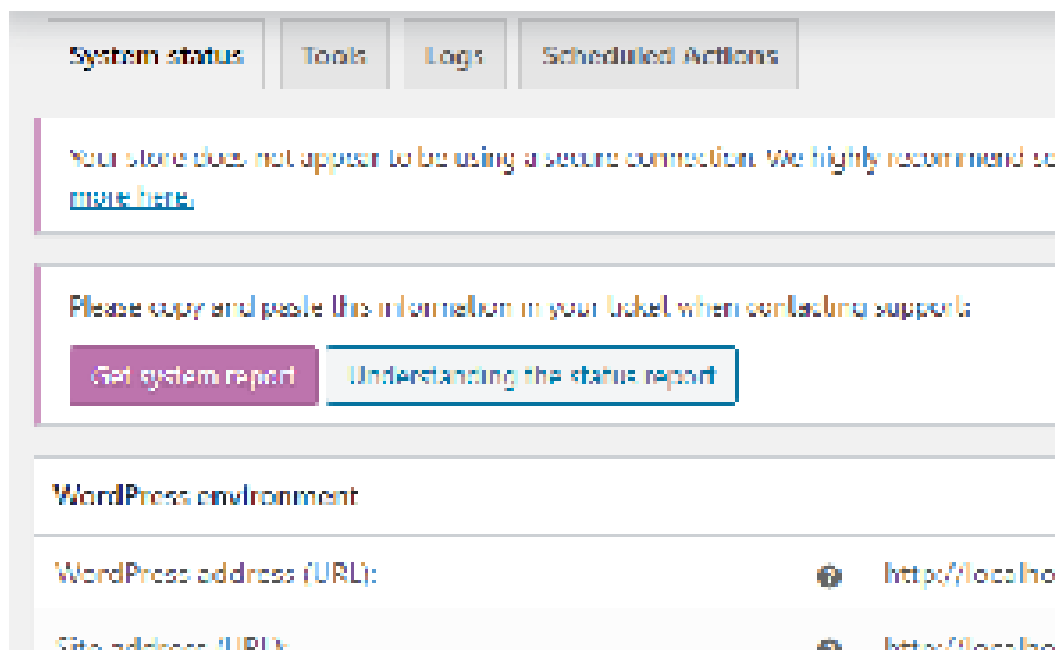
1 WooCommerce Tab

Note: An order also has a Status. Order statuses let you know how far along the order is, starting with "Pending payment" and ending with "Completed." The following order statuses are used:

- Pending payment — Order received, no payment initiated. Awaiting payment (unpaid).
- Failed — Payment failed or was declined (unpaid) or requires authentication (SCA). Note that this status may not show immediately and instead show as Pending until verified (e.g., PayPal).
- Processing — Payment received (paid) and stock has been reduced; order is awaiting fulfillment. All product orders require processing, except those that only contain products which are both Virtual and Downloadable.
- Completed — Order fulfilled and complete – requires no further action.
- On hold — Awaiting payment – stock is reduced, but you need to confirm payment.
- Refunded — Refunded by an admin – no further action required.
- Authentication required — Awaiting action by the customer to authenticate the transaction and/or complete SCA requirements.

WooComm

1 WooCommerce Tab

Visual Diagram to Illustrate Order Statuses

This visual representation follows an order through its statuses from "Pending payment" to "Completed", "Canceled" or "Refunded."
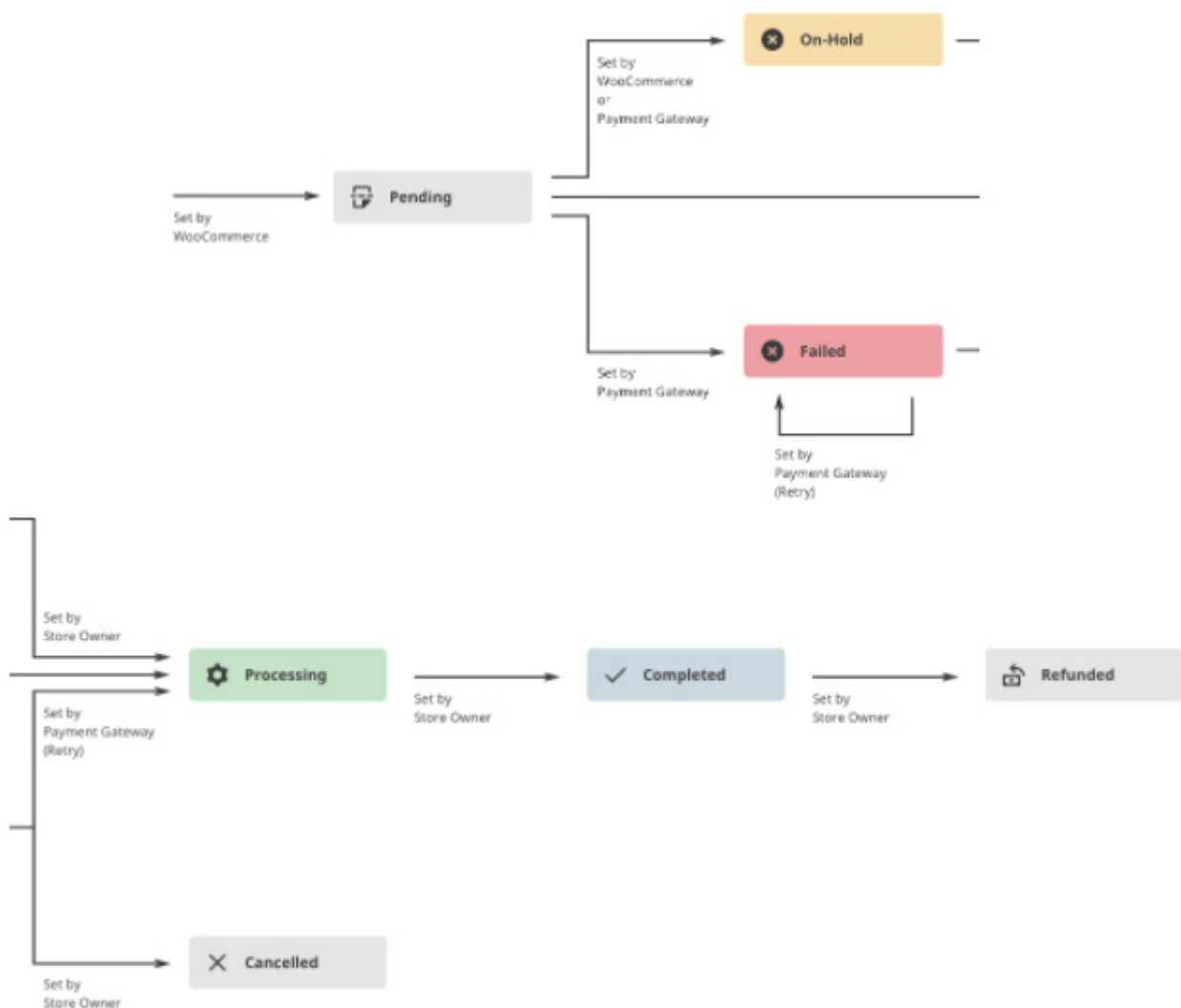
1.8 Extensions

1.) Go to WooCommerce Tab » Extensions.
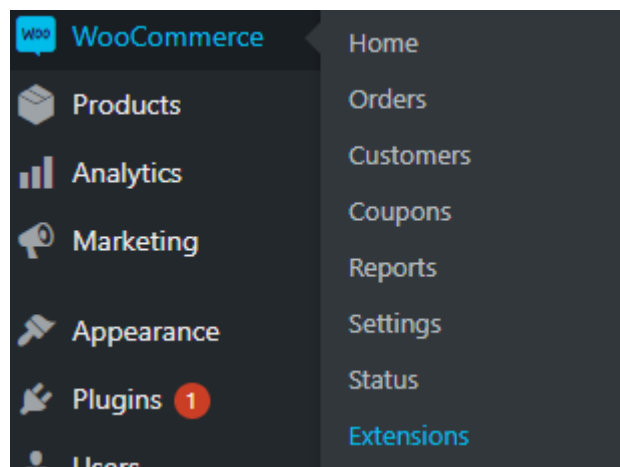
2.) Here you will see different extensions that you can install to your website, some Extensions cannot be installed unless you paid for it.
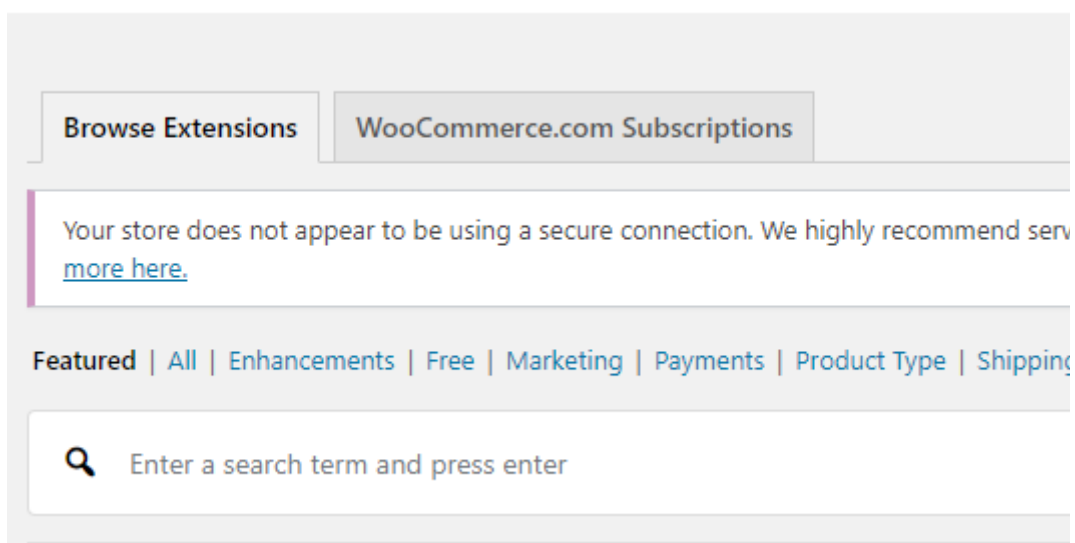
2.1 All Products

1.) Go to **Products** » All Products.
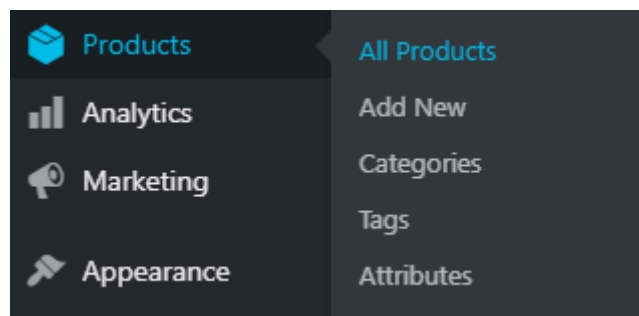
2.) After navigating you will see the display
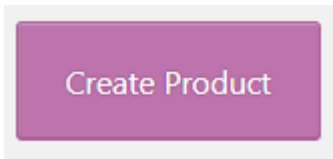
2 Products Tab

3.) It will show your all your products. You can also Import Products if you have already created, Just click on the Star Import button.

Start Import

4.) If not, Click on the Create Product button and it will automatically proceed to Add New page.

Create Product

2.2 Add New

1.) Go to Products » Add New to add your first product or to add new Products to your store.
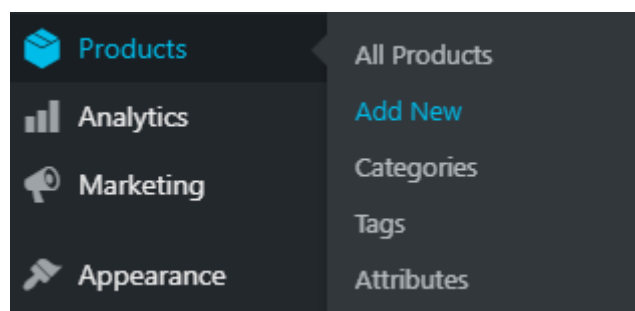
Products

2 Products Tab

2.) Enter the title or name of your product.

oduct name

3.) Enter a short description that best decribes your product.

Product short description

Add Media

Paragraph ▼ B I ≣ ≣ 66 ≣ ≣ ≣ ∂ ▦ ✕ ▦

4.) For the promos you can enter the regular price and the sale price. also you can leave the sale as null if you want to sell your products without giving a discount.

Product data — | Simple product ⌄ | Virtual: ☐

⚒ General   Regular price (£)

◆ Inventory   Sale price (£)

🚚 Shipping

∂ Linked Products

2 Products Tab

5.) To set image of the product, just click on "set product image" to the right middle of the page.
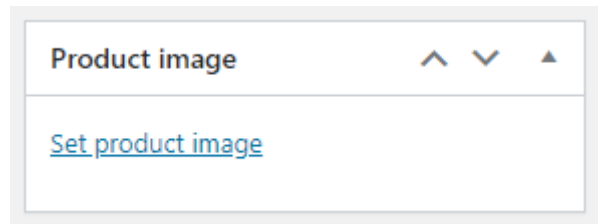
6.) Upload the image of the selected photo by draging or browsing and selecting an image.

7.) After selecting simply click the Set product image button.
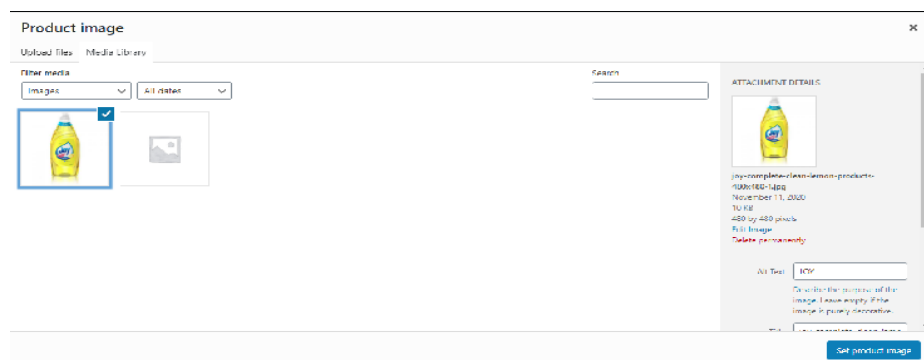
Products T

2 Products Tab

8.) When the product is set and good to go click on the Publish button.
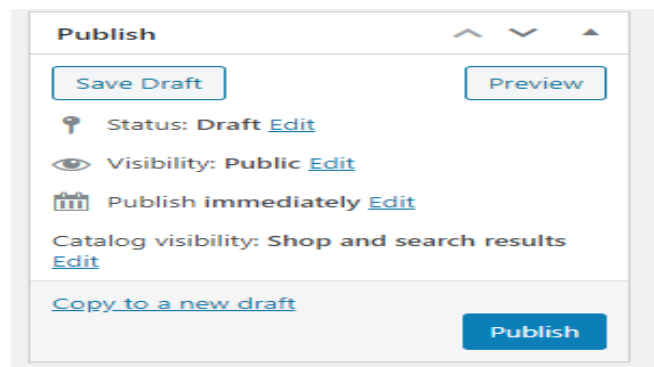
2.3 Categories

1.) After providing the title and details for the description, click on the 'Add new product category' link in the right column
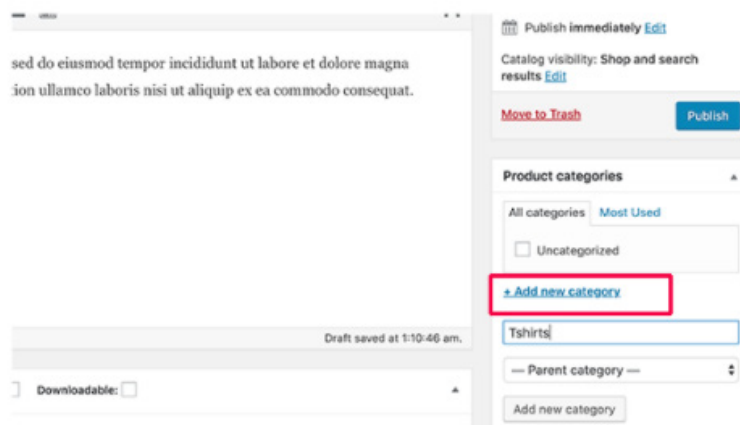
2 Products Tab

2.) You can also go to Products » Categories.
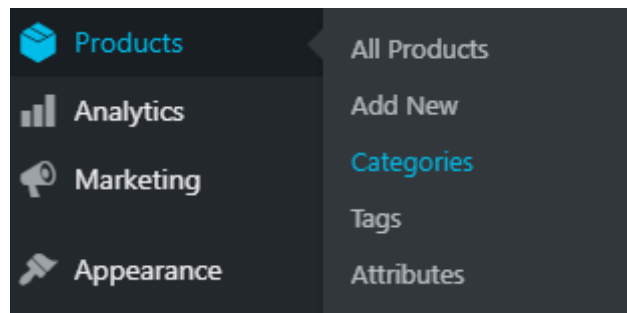
3.) After filling up the forms you will also need to Upload/Add Image if you want a display for your category.

4.) Select Parent category, if it is newly created the parent category will set as Uncategorized(default). You can also select "none".

5.) Click Upload/Add Image Button.
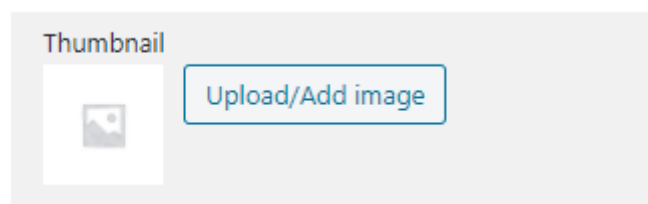
7.) After Clicking the Add new category Button.

8.) You will see the added category on your top right corner.

Products T

2 Products Tab

9.) You will see the added category on your top right corner.
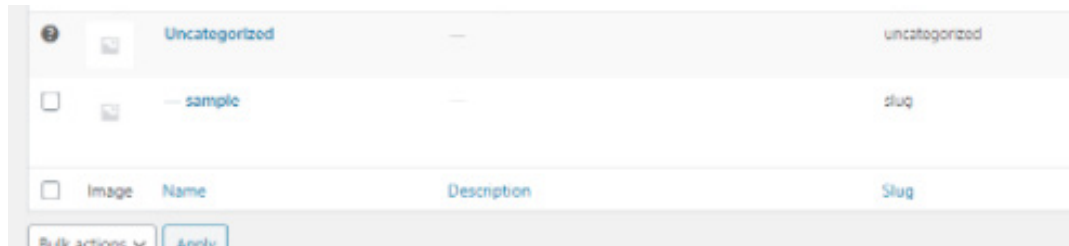
10.) If everything is alright and set, click the Apply button
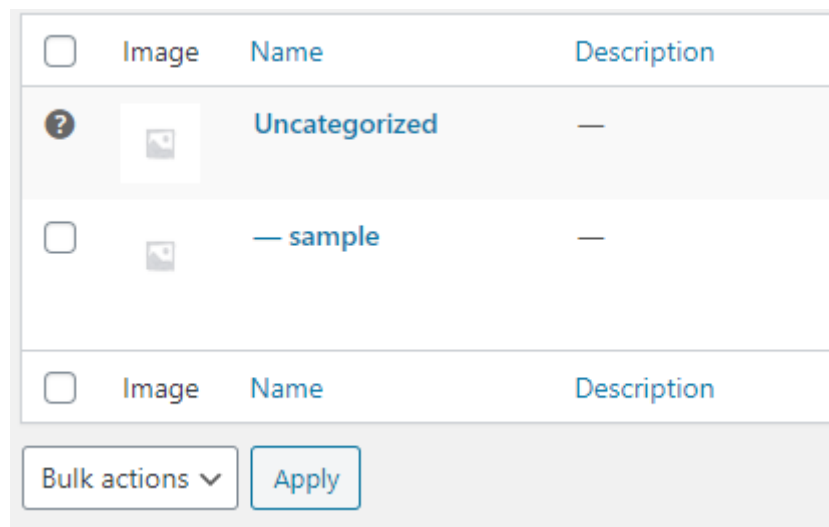
2.3 Tags

1.) Scroll down a little to the "Product Data" box. This is where you will select the product type, add product pricing, shipping, and other information.

2 Products Tab

2.) You will also see a product short description box. This description will also be used on different product pages on your website. You need to add an informative and a catchy short description that helps you get more clicks.

3.) You can also go to Products » Tags.
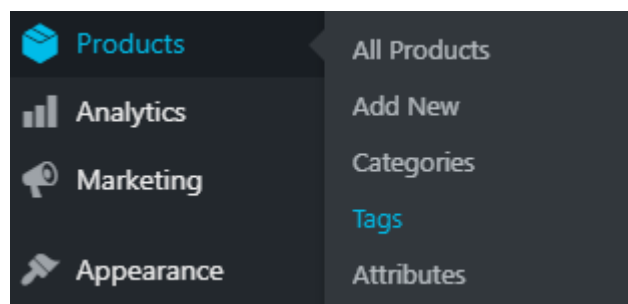
2 Products Tab

4.) Fill up the following forms.

5.) Click the Add new tag button and you will see the added new tag at the top right corner.

	Name	Description	Slug	Count
☐	Name	Description	Slug	Count
☐	Tag 1	sample	sample-tag-1	0
☐	Tag 2	sample sample	sample-tag-2	0
☐	Name	Description	Slug	Count

Bulk actions ∨ Apply   2 items

6.) If everything is alright and set, click the Apply button.

Bulk actions ∨ Apply

2.4 Attributes

1.) You need to add the main product image. This will be the main product image that's used on the shop pages across your store.
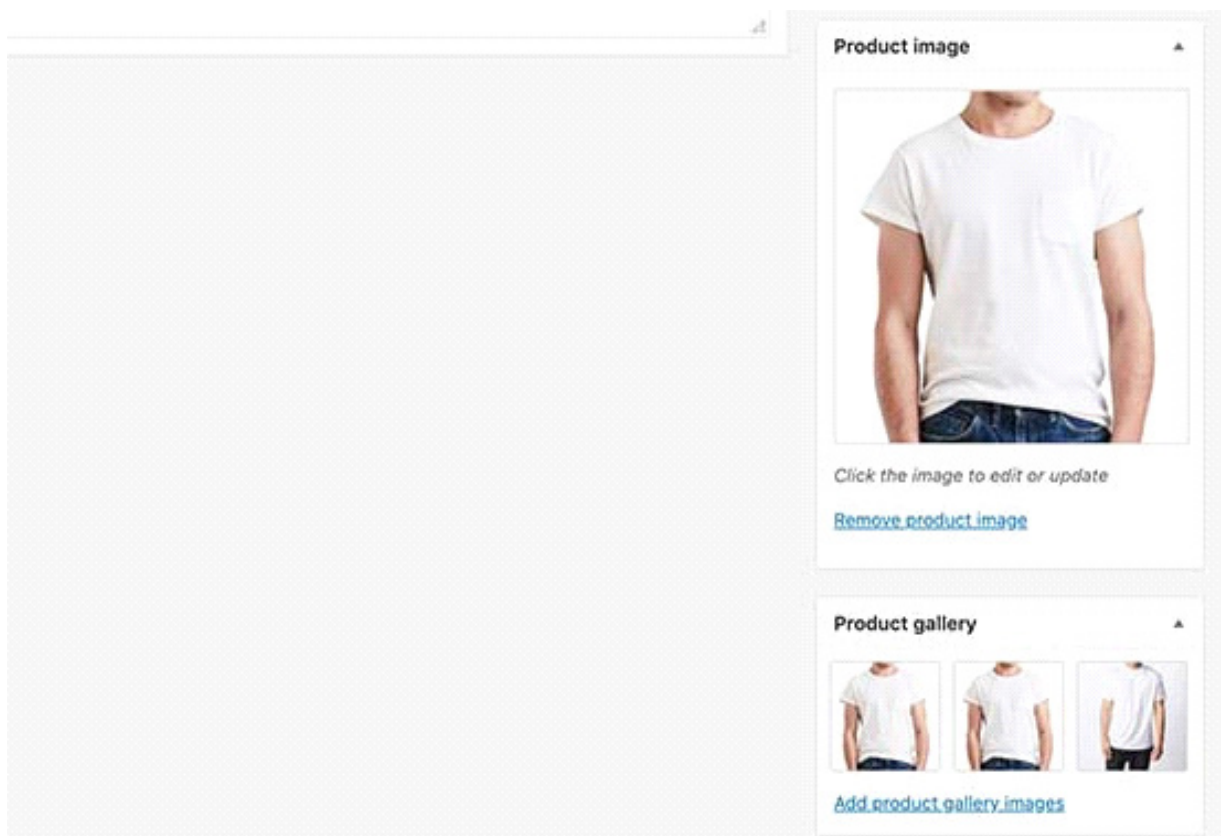
2.) You can add multiple images to create an image gallery of your product.

2 Products Tab

3.) Review all the product information that you have added so far.

4.) Click on the Publish button at the top right box on the screen to publish your product.

tab
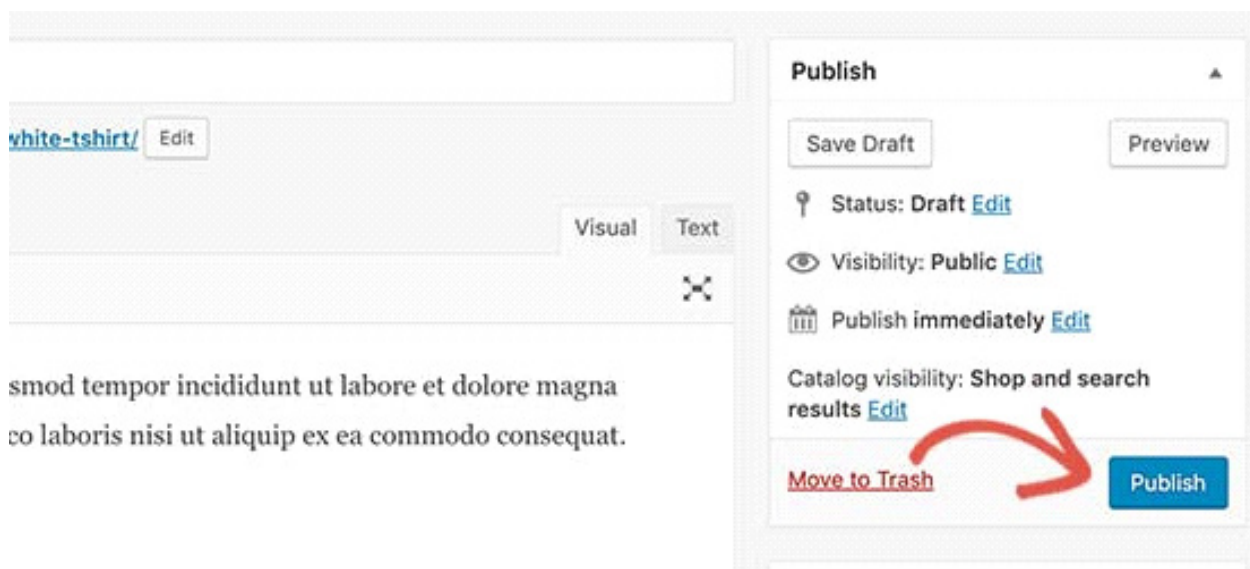
3 Analytics Tab

OBJECTIVES:

- Learn to check your total sales, net sales, orders and items sold according to the date range of your business.
- Learn to generate your total income and net income within your selected date range.
- Learn to calculate the total amount of your discounted orders within the selected date range.
- Learn to calculate the total of different taxes.
- Learn to check your stocks.
- Learn to check the total downloads of your business.

Analytics T

3 Analytics Tab

3.1 Overview

1.) Overview is the tab where you will check the overall performance of your business which consists of the total sales, net sales, orders and items sold with the selection of the date range of your business followed by the progress charts of the net sales and orders

Performance

Total Sales		Net Sales		Orders		Items Sold
£0.00	0%	£0.00	0%	0	0%	0

Date Range:

Month to Date (Nov 1 - 11, 2020)
vs. Previous Year (Nov 1 - 11, 2019)

3 Analytics Tab

2.) Click the dropbox below Date Range and it will show you the selections of date range you want to update.
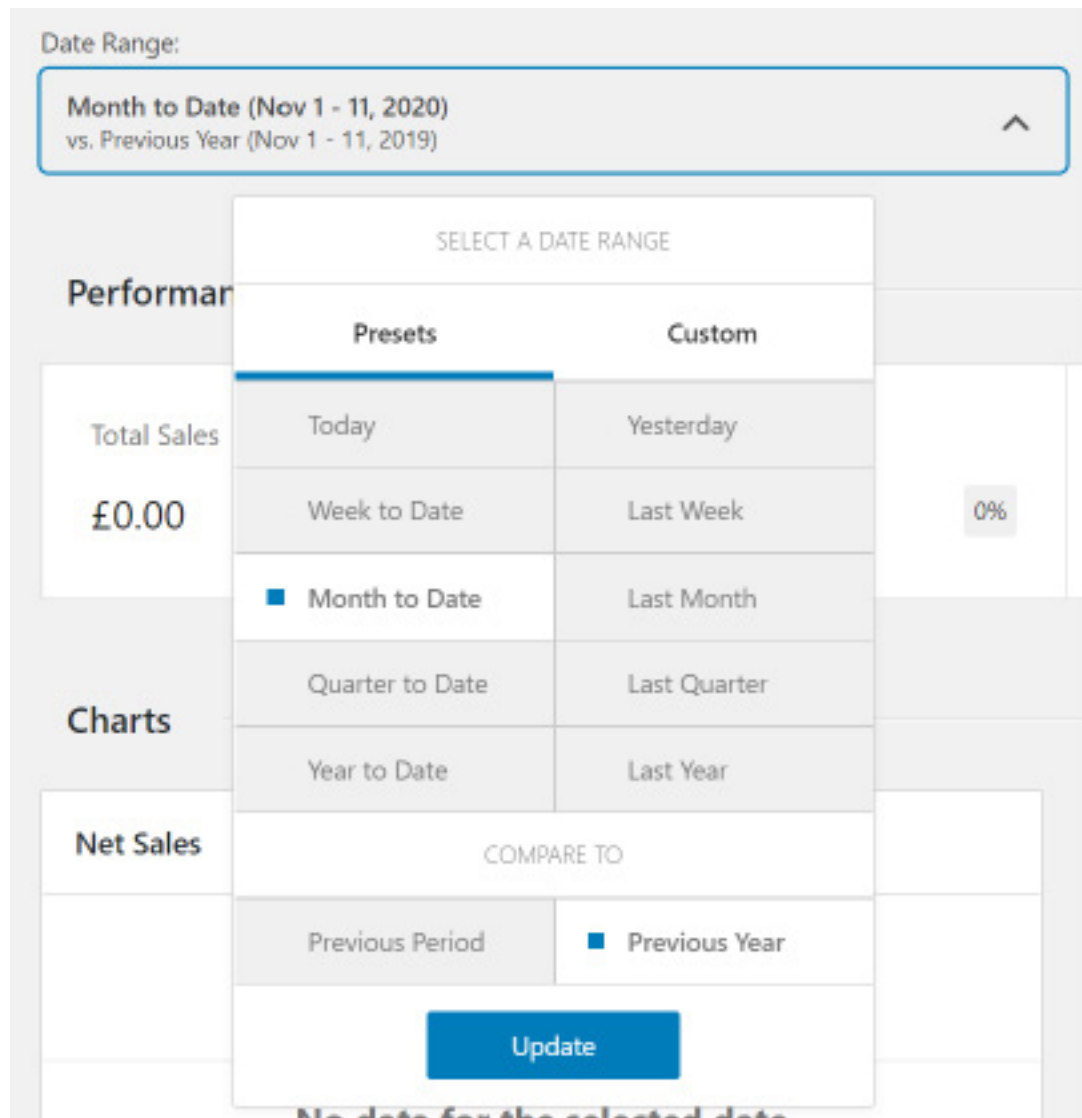
Analytics T

3 Analytics Tab

3.) You can also customize your dates with the specific date range you want by clicking the custom and after selecting the date range you want press update.

3 Analytics Tab

4.) On the charts menu is the progress of the net sales and orders within the selected date range and compares it to last years progress chart on that same date range.

Charts

Net Sales

No data for the selected date range

£0   1   3   5   7   9   11
      Nov 2020

| ■ Month to Date (Nov 1 - 11, 2020) | £0.00 |
| ■ Previous Year (Nov 1 - 11, 2019) | £0.00 |

Orders

No data for the selected date range

0   1   3   5   7   9   11
      Nov 2020

| ■ Month to Date (Nov 1 - 11, 2020) | 0 |
| ■ Previous Year (Nov 1 - 11, 2019) | 0 |
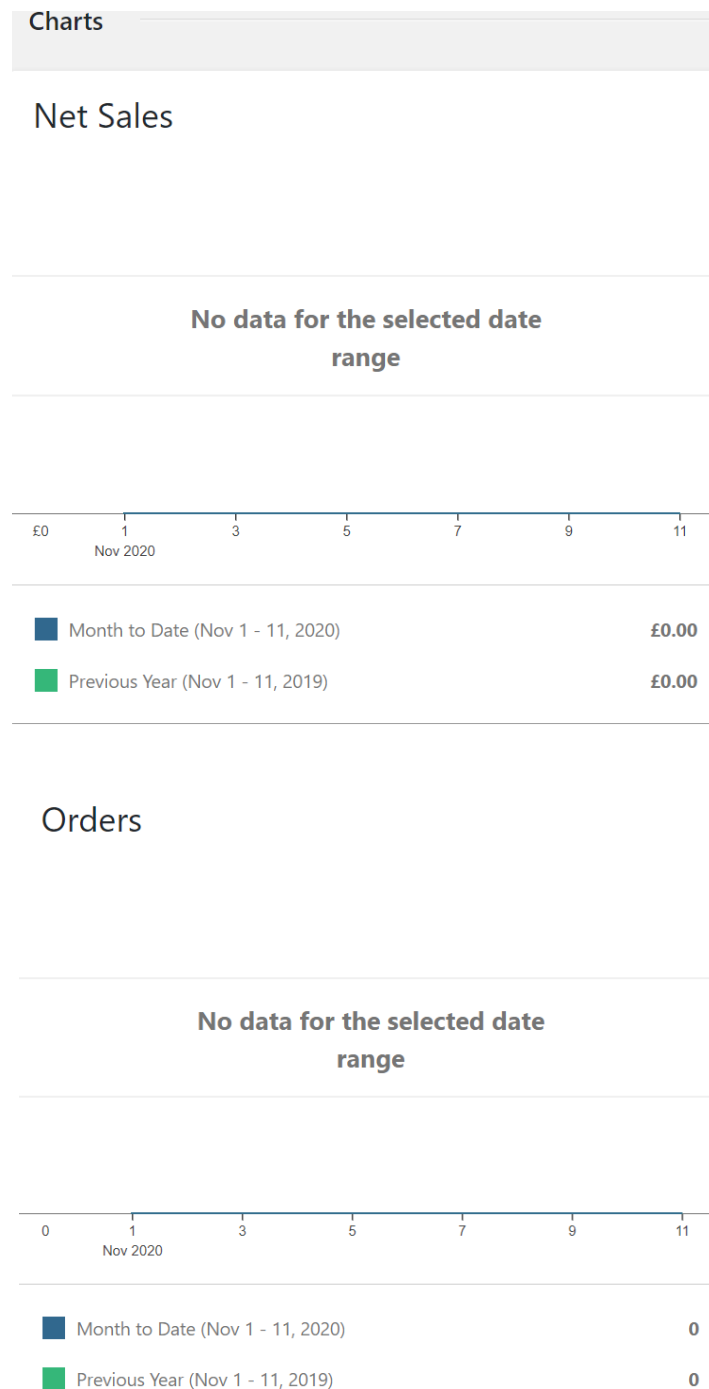
Analytics T

3 Analytics Tab

3.2 Revenue

1.) The Revenue tab is where you can check all the total income of the gross sales, returns, coupons, net sales, taxes, shipping and total sales within the selected date.

Gross Sales		Returns		Coupons		Net Sales
£0.00	0%	£0.00	0%	£0.00	0%	£0.00

Taxes		Shipping		Total Sales		
£0.00	0%	£0.00	0%	£0.00	0%	

Gross Sales   ✔ Month to Date (Nov 1 - 11, 2020)   **£0.00**   ✔ Previous Year (Nov 1 - 11, 2019)   **£0.00**   By day ∨

2.) By **clicking** any of the income table box it will show the progress chart below of that income which compares it to last years income within the same selected date range and a complete list of a day by day income report on that date range.

Total Sales   ✔ Month to Date (Nov 1 - 11, 2020)   **£0.00**   ✔ Previous Year (Nov 1 - 11, 2019)   **£0.00**   By day ∨   ∿ ıll

No data for the selected date range

£0   1   2   3   4   5   6   7   8   9   10   11
   Nov 2020

3 Analytics Tab

Date	Orders	Gross Sales	Returns	Coupons	Net Sales	Taxes	Shipping	∨ Total Sales
November 1, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 2, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 3, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 4, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 5, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 6, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 7, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 8, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 9, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 10, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
November 11, 2020	0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

Revenue ☁ Download ⋮

11 days   0 orders   £0.00 gross sales   £0.00 returns   £0.00 coupons   £0.00 net sales   £0.00 taxes   £0.00 shipping   £0.00 total sales

Analytics T

3 Analytics Tab

3.3 Orders

1.) The orders tab consists of the total ordered products, net sales, average order value and average items per order within the selected date range.

Orders		Net Sales	
0	0%	£0.00	0%

Orders   ✔ Month to Date (Nov 1 - 11, 2020) **0**   ✔ Previous Year (Nov 1 - 11, 2019) **0**

Average Order Value		Average Items Per Order	
£0.00	0%	0	0%

By day ∨
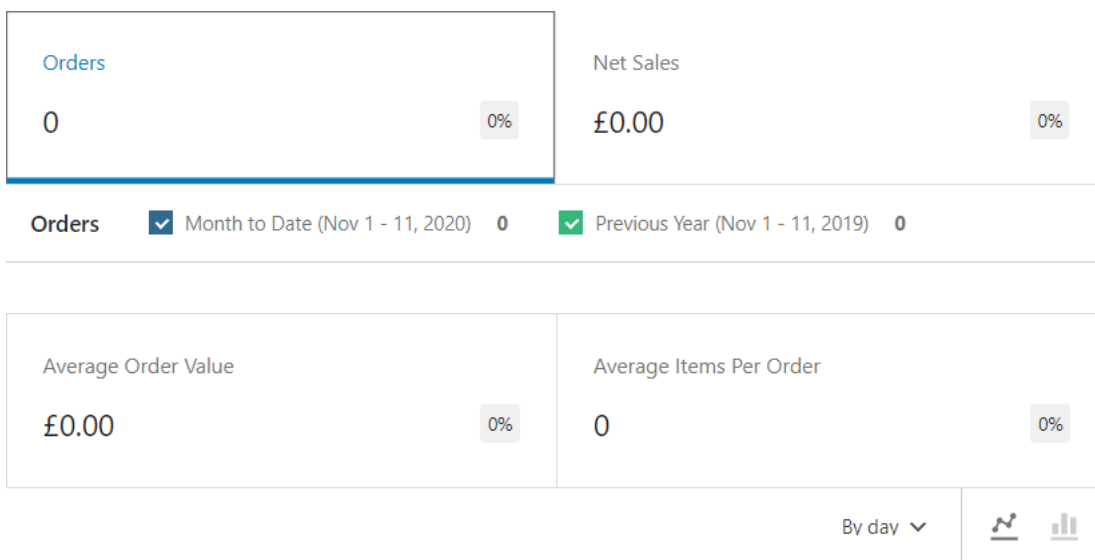
2.) By **clicking** any of the order box results it will produce a chart for the selected date range.

No data for the selected date range

```
  4        5        6        7        8        9        10       11
```

Tab
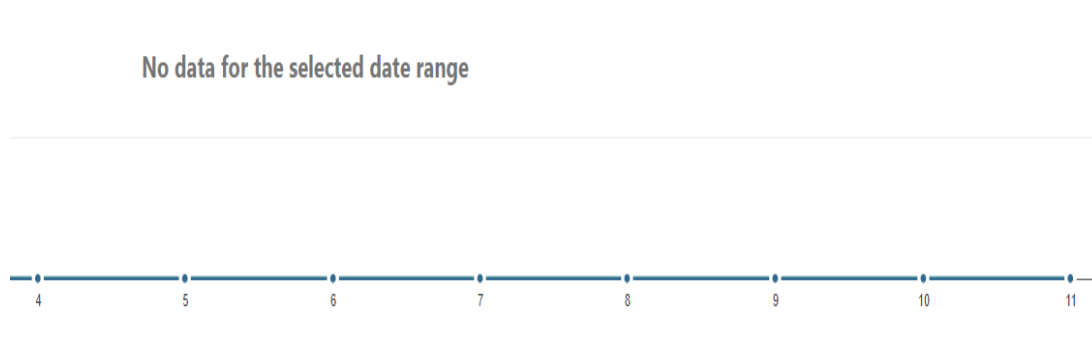
3 Analytics Tab

3.) The Advanced filter dropbox is for filtering out a specific order by clicking it and selecting advance filters you can search any specific order you want to show.

Show:

| Advanced Filters | ⌄ |

3 Analytics Tab

3.4 Products

1.) The products tab shows the total of items sold, net sales and orders with the same progress chart shown below on the selected date range.
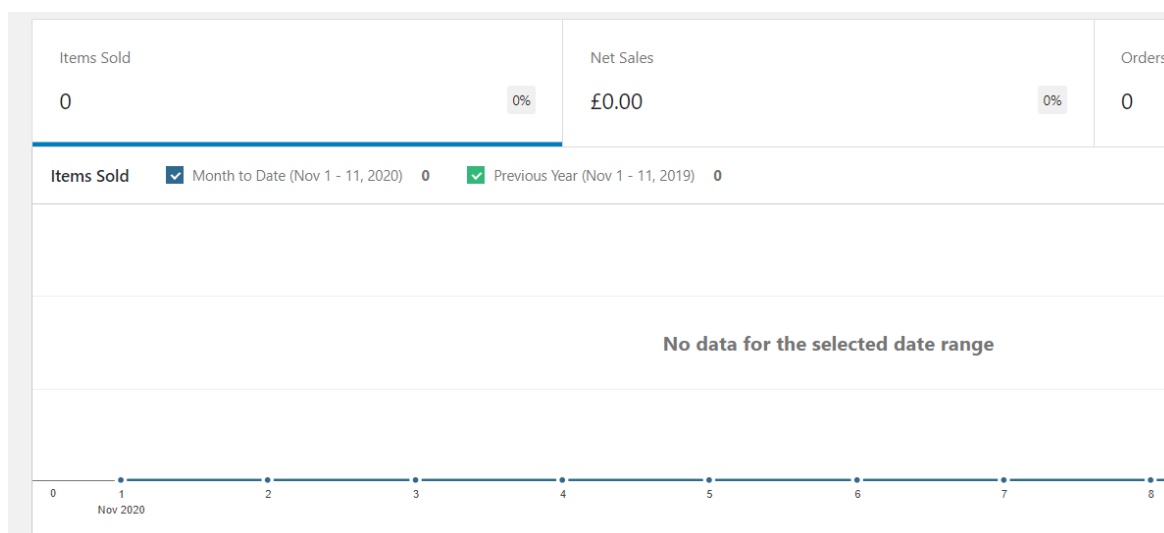
2.) A show labeled dropbox can be found beside the date range which is used for searching a specific product and compare them by clicking on it and type in the product name.
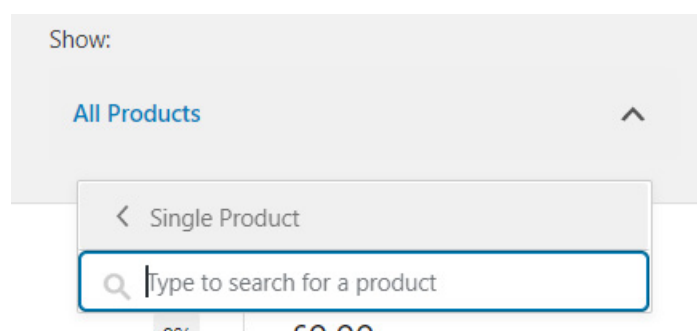
3 Analytics Tab

3.5 Categories

1.) The categories tab is the same layout as the product tab with the total category of items sold, net sales and orders. The show dropbox button is also displayed to search any specfic categories and compare them with the chart below.
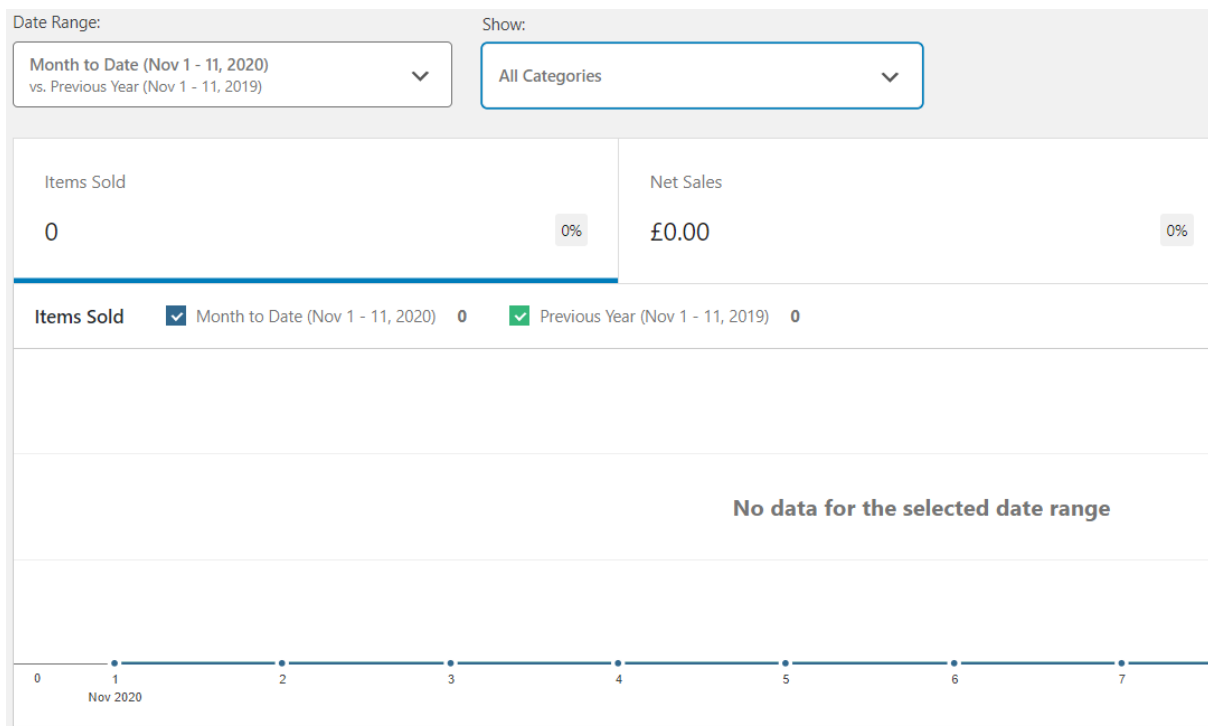
Analytics

3 Analytics Tab

3.6 Coupons

1.) In the coupons tab shows the total discounted orders sold and its total amount and produces a progress chart within the given date range. Also with a dropbox menu to search for any specific coupons and compare them to each other.
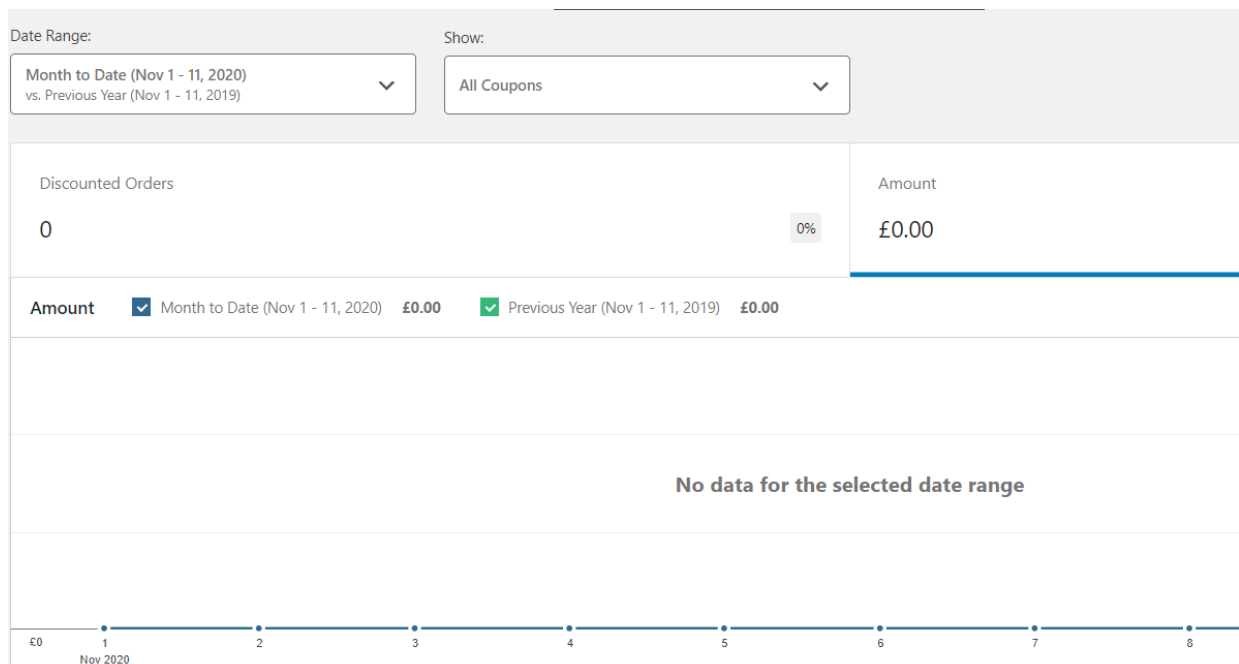
3 Analytics Tab

1.) You can also uncheck or check the month to date on the chart if you dont want to show it and the previous year with the same date range progress chart and can select which type of chart you want the line chart or bar chart.
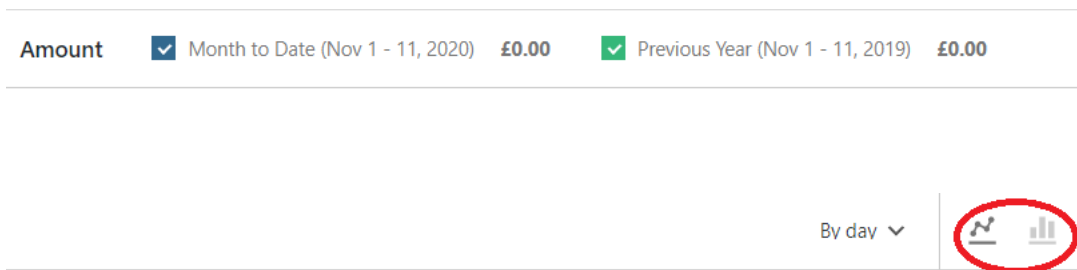
Analytics

3 Analytics Tab

3.7 Taxes

1.) The taxes tab consists of different kinds of taxes being totalled the overall total taxes, order tax, shipping tax and orders. Each with different progress charts on the given date range and a show dropbox menu which you can search for the tax codes to compare.

Compare Tax Codes

🔍 Search for tax codes to compare

Compare

Total Tax		Order Tax		Shipp
£0.00	0%	£0.00	0%	£0.0

Total Tax

Tab

3 Analytics Tab

3.8 Downloads

1.) Downloads tab consists of the total number of downloads shown.

Downloads

0

Downloads   ☑ Month to Date (Nov 1 - 12, 2020)   0   ☑ Previous Year (Nov 1 - 12, 2019)

2.) With an advance filters dropbox to select any specific product, username, order and IP address you want to search then press add a filter.

vanced Filters   ∧

All Downloads

■ Advanced Filters

Downloads Match   [All ∨]   Filters

⊕ Add a Filter

Product

Username

Order #

IP Address
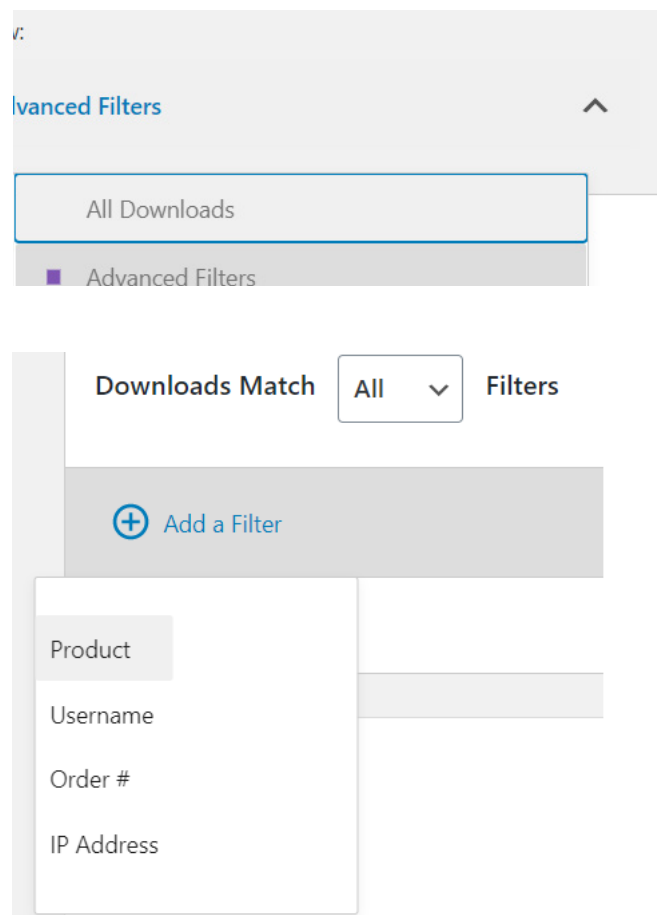
3 Analytics Tab

3.) After adding the filters you want type in what you want to search then press the filter button below.
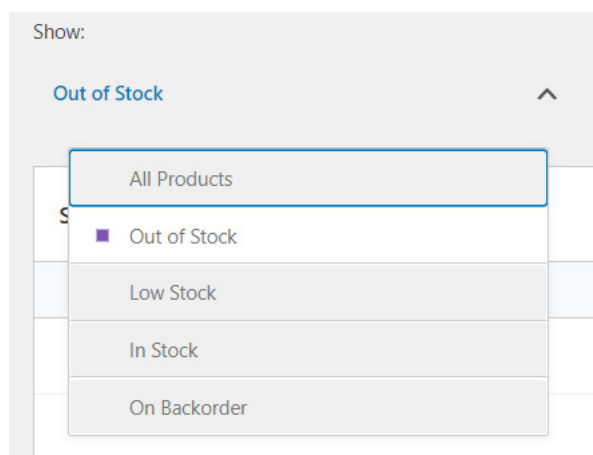
3 Analytics Tab

3.9 Stocks

1.) The stocks tab only consists of a list of all the product/variation and its stock keeping unit, status and number of stocks in storage.

2.) The show dropbox menu on stocks tab shows different lists to be displayed like the products that are only out of stock, low on stock, in stock and on backorder you can click any of them.

Tab

3.10 Settings

1.) The excluded statuses and Actionable statuses can be found in the analytics settings with checkboxes beside for you to check or uncheck the status you want to show on the reports.

Analytics Settings

Excluded Statuses:
- [x] Pending payment
- [ ] Processing
- [ ] On hold
- [ ] Completed
- [x] Cancelled
- [x] Failed

Orders with these statuses are excluded from the totals in your reports. The **Refunded** *status can not be excluded.*

Actionable Statuses:
- [ ] Pending payment
- [x] Processing
- [x] On hold
- [ ] Completed
- [ ] Cancelled
- [ ] Failed

Orders with these statuses require action on behalf of the store admin. These orders will show up in the Orders tab under the activity panel.

3 Analytics Tab

2.) After selecting the status you can you can choose the default date range below for your whole business then press save settings.

4 Marketing Tab
4.1 Overview

1.) The overview in marketing tab is where you will select different platforms for your extensions to further advertise and grow your business.
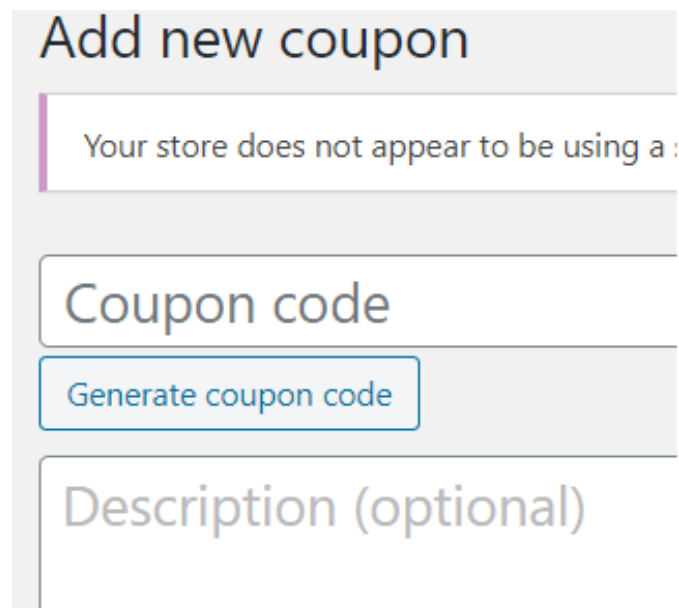

Marketing

4 Marketing Tab

4.2 Coupons

1.) Coupons tab in marketing is where you will create your discounted products or coupons to be sold.
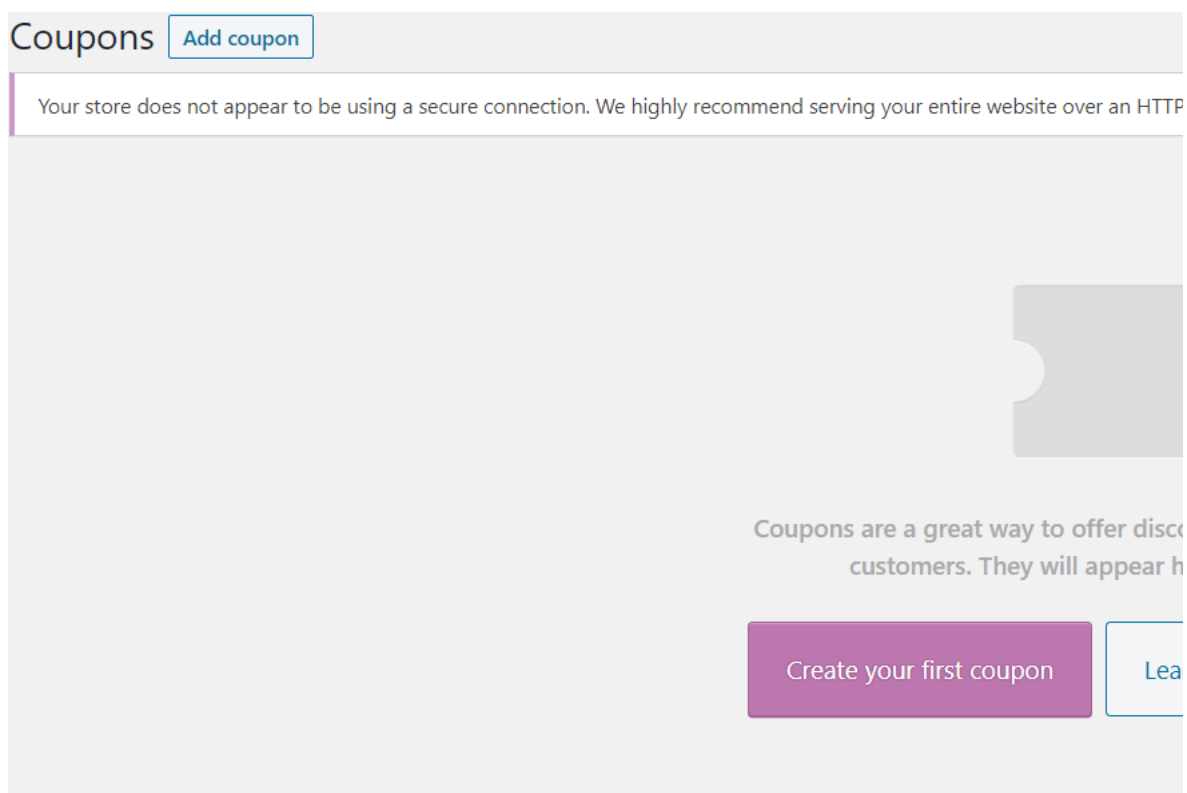
Tab

4 Marketing Tab

2.) After clicking on create your first coupon it will take you to this page which you will enter your coupon code and description.

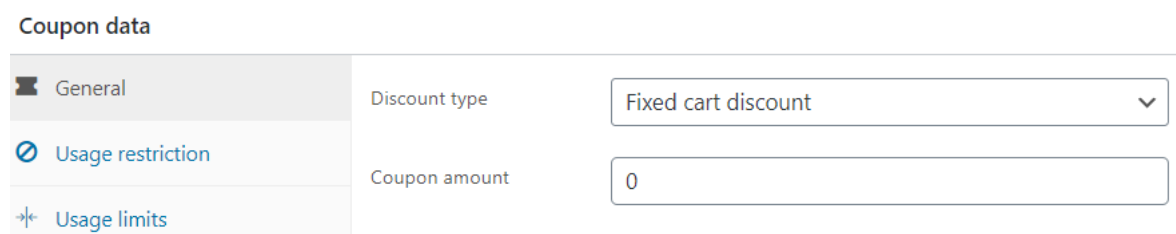3.) Below that is the coupon date with three tabs the General, usage restrictions and usage limits. In the general tab you will select the discount type of the coupon with a dropbox and enter the coupon amount.

Marketing

4.) After selecting the coupon type and entering the amount you can check if your coupon will be allowed for free shipping on delivery and select the expiration date.

Allow free shipping   ☐ Check this box if the coupon grants free shipping. A free shipping and be set to require "a valid free shipping coupon" (see the "Free

Coupon expiry date   [YYYY-MM-DD] ❓

Tab

End of WooCommerce
User Manual