

WooCommerce User Manual

A brief overview of the WooCommerce software.

An extension of WordPress to allow users build an eCommerce 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.

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.

Inbox
 Insights and growth tips for your business

21 hours ago

Tips, product updates, and inspiration
 We're here for you - get tips, product updates and inspiration straight to your email box

[Yes please!](#)
[Dismiss](#)

21 hours ago

Connect with your audience
 Grow your customer base and increase your sales with marketing tools built for WooCommerce.

[Open marketing hub](#)
[Dismiss](#)

21 hours ago

Connect to WooCommerce.com
 Connect to get important product notifications and updates.

[Connect](#)
[Dismiss](#)

Finish setup

☐ **Add my products**
 1 minute per product

☐ **Set up payments**
 2 minutes

☐ **Set up tax**
 1 minute

☐ **Personalize my store**
 2 minutes

☒ **Store details**

Stats overview

Today

Week to date

Month to date

Get traffic stats with Jetpack
 Keep an eye on your views and visitors metrics with Jetpack. Requires Jetpack plugin and a WordPress.com account.

[Get Jetpack](#)
[No thanks](#)

Total Sales	Orders
£0.00 0%	0 0%

[View detailed stats](#)

mercerce Tab

1 WooCommerce Tab

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

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

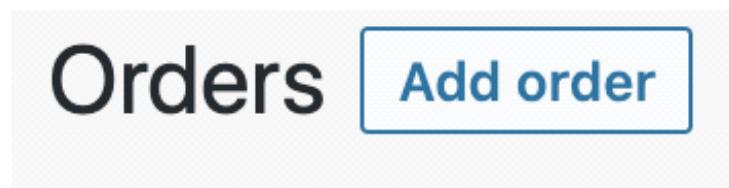
4.) Stats overview breaks down the total sales and orders from today, week to date, and month to date.

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

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.

A screenshot of the 'Add new order' page in the WooCommerce admin interface. The page is titled 'Add new order' and shows the 'Order #15 details' section. It includes fields for 'Date created' (2020-11-06), 'Status' (Pending payment), and 'Customer' (Guest). There are also sections for 'Billing' and 'Shipping' addresses, both currently showing 'No billing/shipping address set.' Below these is a table for items with columns for 'Item', 'Cost', 'Qty', and 'Total'. The 'Items Subtotal' and 'Order Total' are both £0.00. At the bottom, there is a 'Custom Fields' section with a form to add new custom fields, and a 'Downloadable product permissions' section with a search bar and a 'Grant access' button. On the right side, there are panels for 'Order actions' (with a 'Choose an action...' dropdown and a 'Create' button) and 'Order notes' (with a note input field and an 'Add' button).

1 WooCommerce Tab

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

Order #18 details

General	Billing	Shipping
Date created: 2020-11-09 @ 11 : 36 Status: Customer payment page → Pending payment Customer: Guest	Load billing address First name: John1 Last name: Doe Company: Metrobank Address line 1: Darkness 101 Address line 2: City: Dark Tower Postcode / ZIP: 777 Country / Region: United Kingdom State / County: Email address: john1doe@gmail.com Phone: 7777777 Payment method: N/A Transaction ID:	Load shipping address Copy billing address First name: John1 Last name: Doe Company: Metrobank Address line 1: Darkness 101 Address line 2: City: Dark Tower Postcode / ZIP: 777 Country / Region: United Kingdom State / County: Customer provided note: Customer notes about the order

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

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

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

Add products

×

Product	Quantity
<input type="text" value="Search for a product..."/>	<input type="text" value="1"/>

Add

mercerce Tab

1 WooCommerce Tab

Add products		×
Product	Quantity	
<input type="text" value="Search for a product..."/>	<input type="text" value="1"/>	
		<input type="button" value="Add"/>

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

Please enter 3 or more characters

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

Quantity
<input type="text" value="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.

1 WooCommerce Tab



www.alberthehumantest.dev.cc says

Enter a fixed amount or percentage to apply as a fee.

Cancel
OK

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.

Item	Cost	Qty	Total
 P10.00 fee			P10.00
 10% fee			P1.00
Items Subtotal:			P0.00
Fees:			P11.00
Order Total:			P11.00

Add item(s)
Apply coupon
Refund
Recalculate




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

merce Tab

1 WooCommerce Tab

 ₱10.00 fee ₱10.00  



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

Item	Cost	Qty	Total
 <input type="text" value="Item Name 2"/>		<input type="text" value="12"/>	
 10% fee			₱1.00

Items Subtotal: **₱0.00**
 Fees: **₱11.00**
 Order Total: **₱11.00**

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




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

Item	Cost	Qty	Total
 Item Name 2			₱12.00
 10% fee			₱1.00

Items Subtotal: **₱0.00**
 Fees: **₱13.00**
 Order Total: **₱13.00**

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.

Item	Cost	Qty	Total
 Item Name 2			₱12.00
 10% fee			₱1.00
 Shipping			₱0.00
Items Subtotal:			₱0.00
Fees:			₱13.00
Order Total:			₱13.00
<div> Add product(s) Add fee Add shipping Cancel Save </div>			

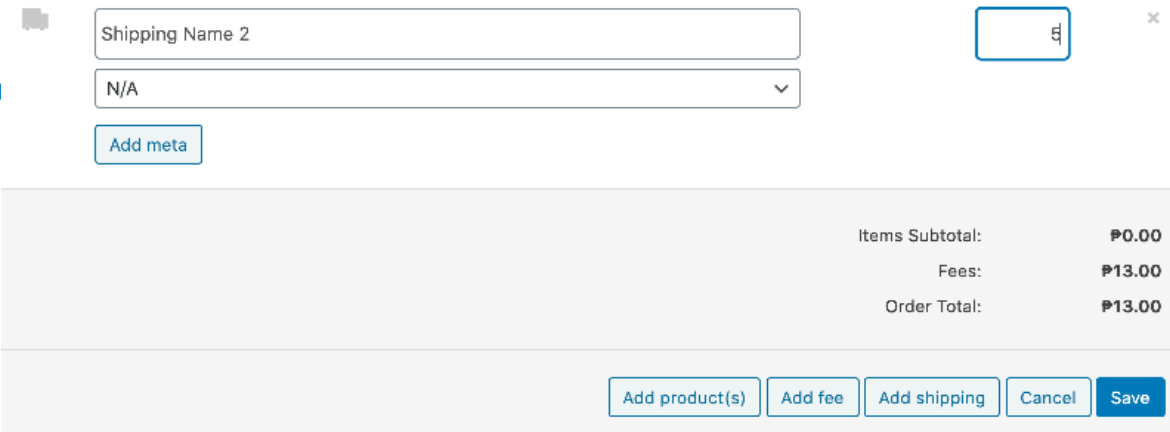
20.) If you hover your arrow to the bar that represents your shipping, you will see a pencil icon as well as an x.

Shipping ₱0.00

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

mercerce Tab

1 WooCommerce Tab



Shipping Name 2

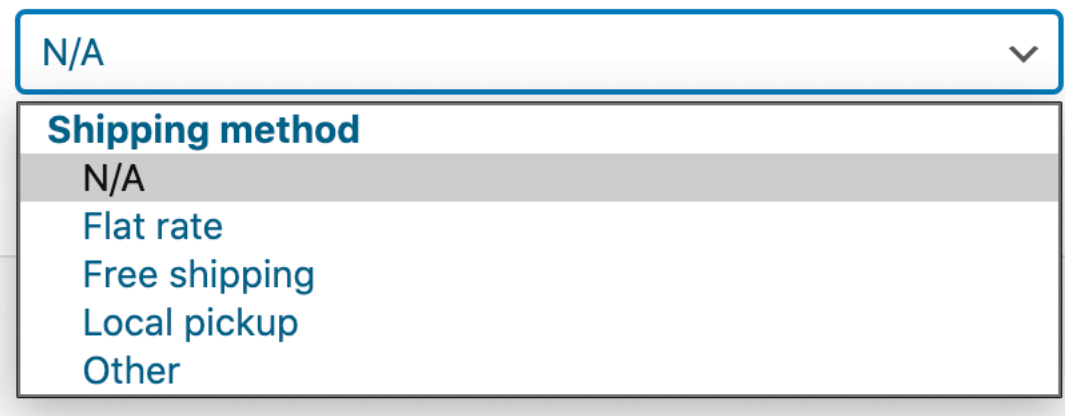
N/A

Add meta

Items Subtotal:	₱0.00
Fees:	₱13.00
Order Total:	₱13.00

Add product(s) Add fee Add shipping Cancel Save

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



N/A

Shipping method

- N/A
- Flat rate
- Free shipping
- Local pickup
- Other




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.

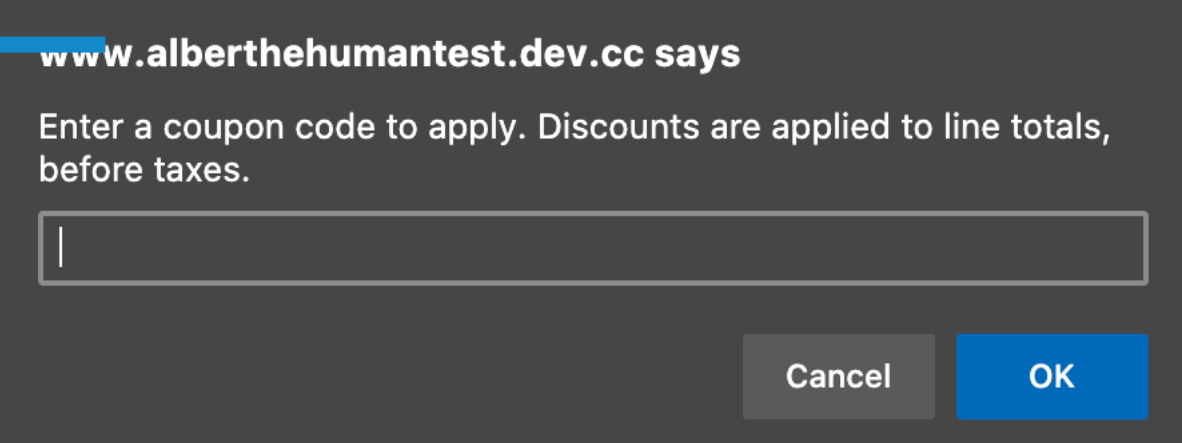
26.) Now you are presented with your updated table.

Item	Cost	Qty	Total
 Item Name 2			₱12.00
 10% fee			₱1.00
 Shipping Name 2			₱5.00
Items Subtotal:			₱0.00
Fees:			₱13.00
Shipping:			₱5.00
Order Total:			₱18.00

mercerce Tab

1 WooCommerce Tab

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

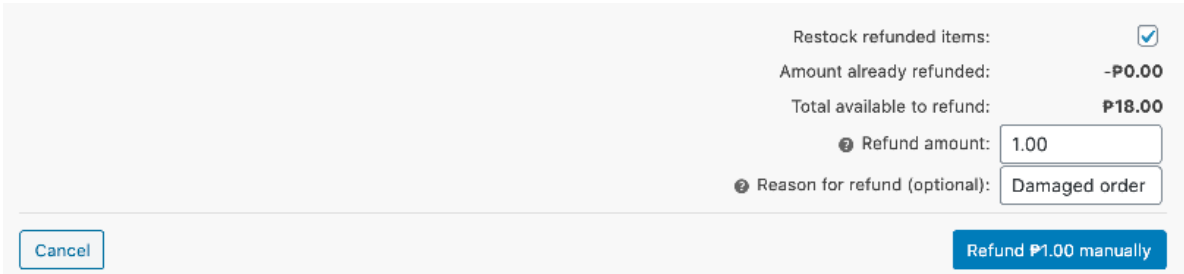


A dark gray pop-up dialog box with a title bar that reads "www.alberthehumantest.dev.cc says". The main text inside says "Enter a coupon code to apply. Discounts are applied to line totals, before taxes." Below the text is a white rectangular input field with a vertical cursor on the left. At the bottom right, there are two buttons: a gray "Cancel" button and a blue "OK" button.

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.



A light gray dialog box for processing a refund. It contains the following fields and controls:

- Restock refunded items:** A checkbox that is checked.
- Amount already refunded:** A text field showing "-P0.00".
- Total available to refund:** A text field showing "P18.00".
- Refund amount:** A text field with a small circular icon to its left, containing the value "1.00".
- Reason for refund (optional):** A text field with a small circular icon to its left, containing the text "Damaged order".
- At the bottom left is a blue "Cancel" button.
- At the bottom right is a blue button that reads "Refund P1.00 manually".

1 WooCommerce Tab

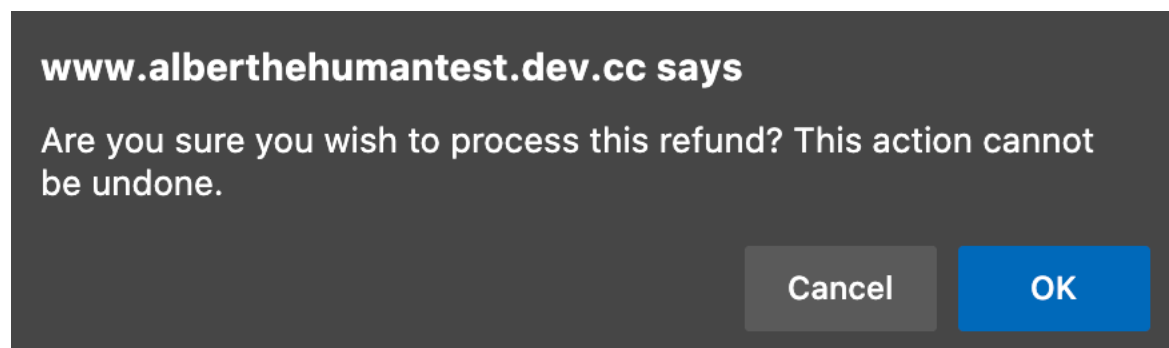
31.) Clicking on the **check box of Restock refunded items**, indicates whether you wish to place refunded item back to stock.

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

Item	Cost	Qty	Total
 Item Name			£12.00
 10% fee			£1.00
 Shipping Name			£5.00
 Refund #18 - November 11, 2020, 12:19 pm by alberthehuman Damaged order			-£1.00

Items Subtotal:	£0.00
Fees:	£13.00
Shipping:	£5.00
Order Total:	£18.00
<hr/>	
Refunded:	-£1.00
Net Payment:	£17.00

Add item(s)
Apply coupon
Refund
Recalculate

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

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Recalculate totals? This will calculate taxes based on the customers country (or the store base country) and update totals.

Cancel

OK

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

WooComm

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.

Downloadable product permissions

Search for a downloadable product...

Grant access

Please enter 3 or more characters

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

Order actions

Choose an action...

Move to Trash

Update

Order actions

Choose an action...

Choose an action...

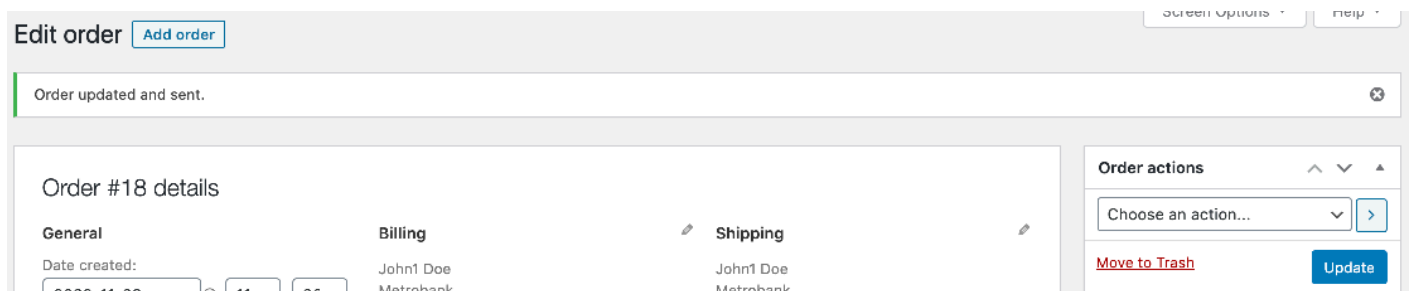
Email invoice / order details to customer

Resend new order notification

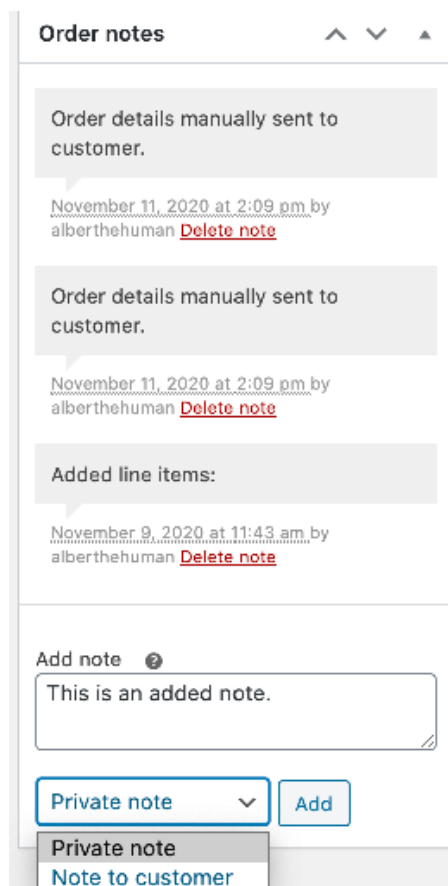
Regenerate download permissions

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.



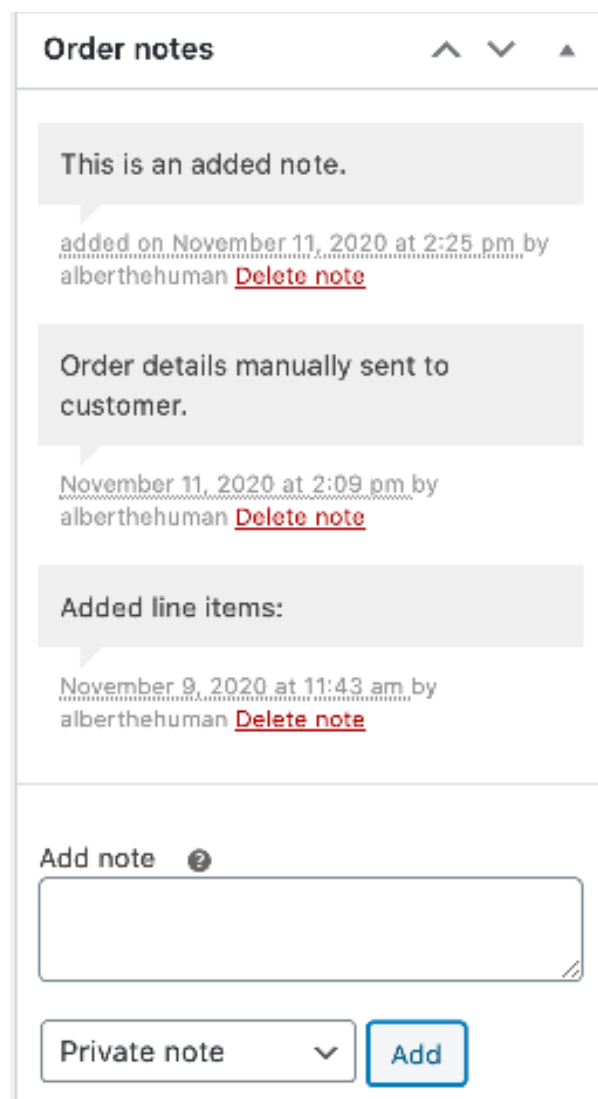
48.) Under Order Notes, you are able to see the history of your order notes.



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.



Order notes ^ v ▲

This is an added note.

added on November 11, 2020 at 2:25 pm by alberthehuman [Delete note](#)

Order details manually sent to customer.

November 11, 2020 at 2:09 pm by alberthehuman [Delete note](#)

Added line items:

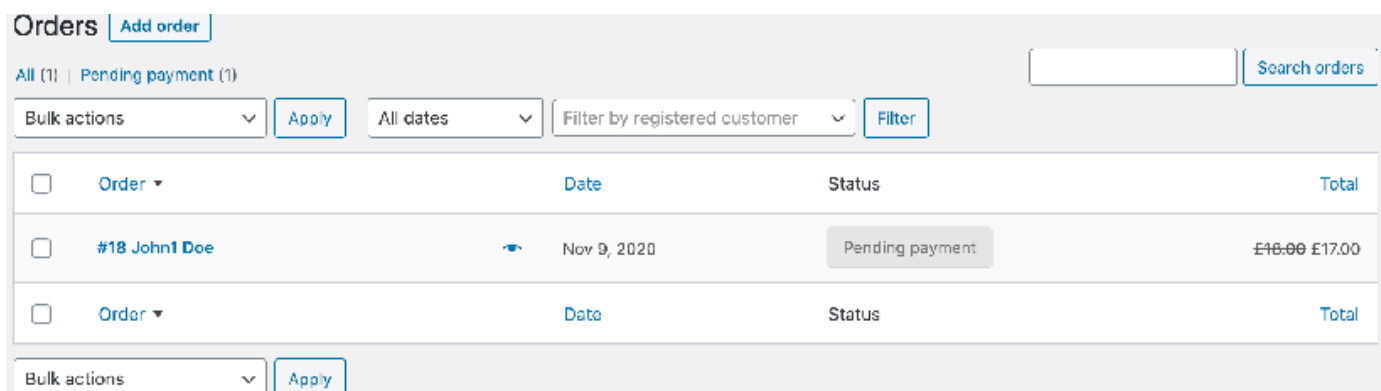
November 9, 2020 at 11:43 am by alberthehuman [Delete note](#)

Add note ⓘ

Private note ▼ **Add**

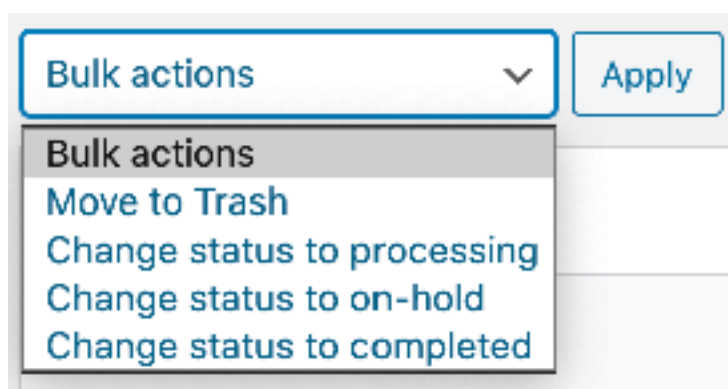
1 WooCommerce Tab

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.



<input type="checkbox"/>	Order ▾	Date	Status	Total
<input type="checkbox"/>	#18 John Doe	Nov 9, 2020	Pending payment	£16.00 £17.00
<input type="checkbox"/>	Order ▾	Date	Status	Total

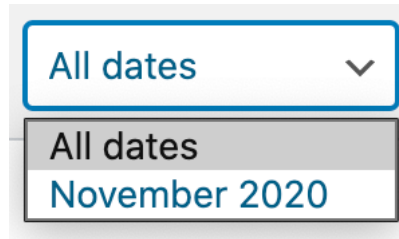
52.) Clicking on **Bulk actions** gives the option for your order to Move to Trash, Change status to processing, Change status to on-hold, or Change status to completed.



53.) Click on **Apply** to save changes.

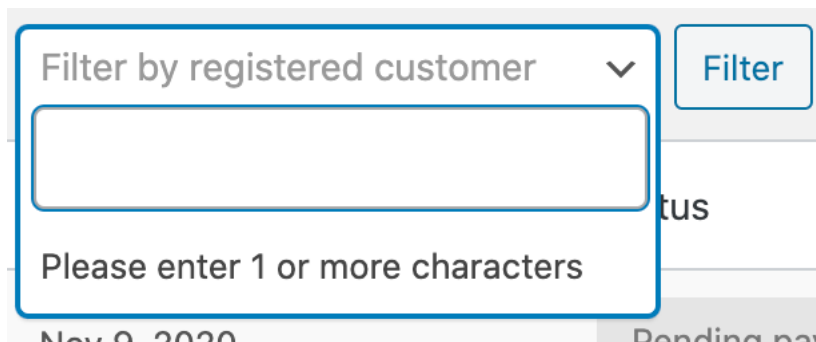
54.) If you click on **All dates**, it will show you the months and years of your order. You may select one to view your order that partook during that time.

1 WooCommerce Tab



A screenshot of a date filter dropdown menu. The dropdown is open, showing two options: "All dates" and "November 2020". The "All dates" option is currently selected and highlighted.

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



A screenshot of the "Filter by registered customer" dropdown menu. The dropdown is open, showing a text input field with the placeholder text "Please enter 1 or more characters". To the right of the dropdown is a blue button labeled "Filter".

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.



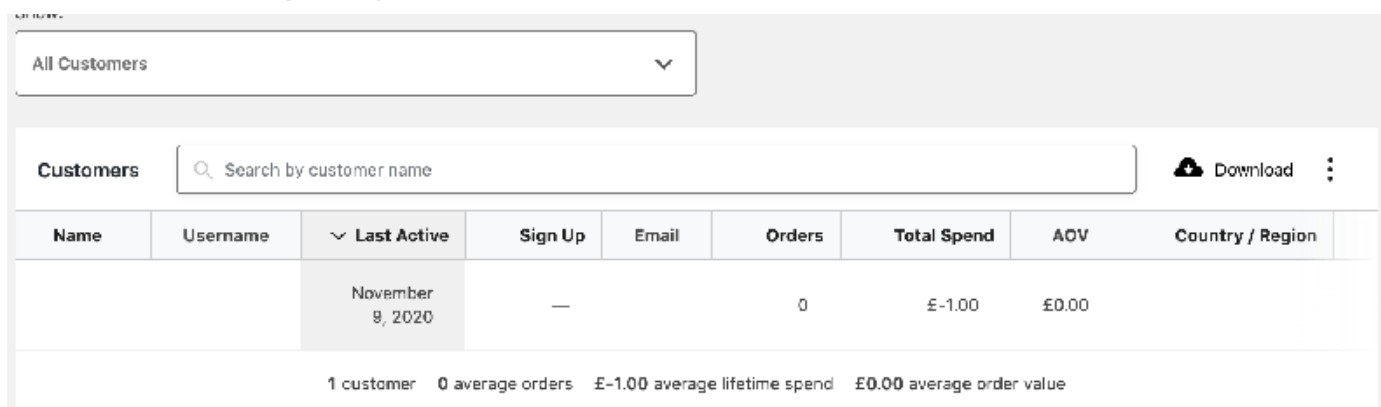
A screenshot of the "Search orders" section. It features a text input field with a placeholder text "Search orders" and a blue button labeled "Search orders".

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

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.

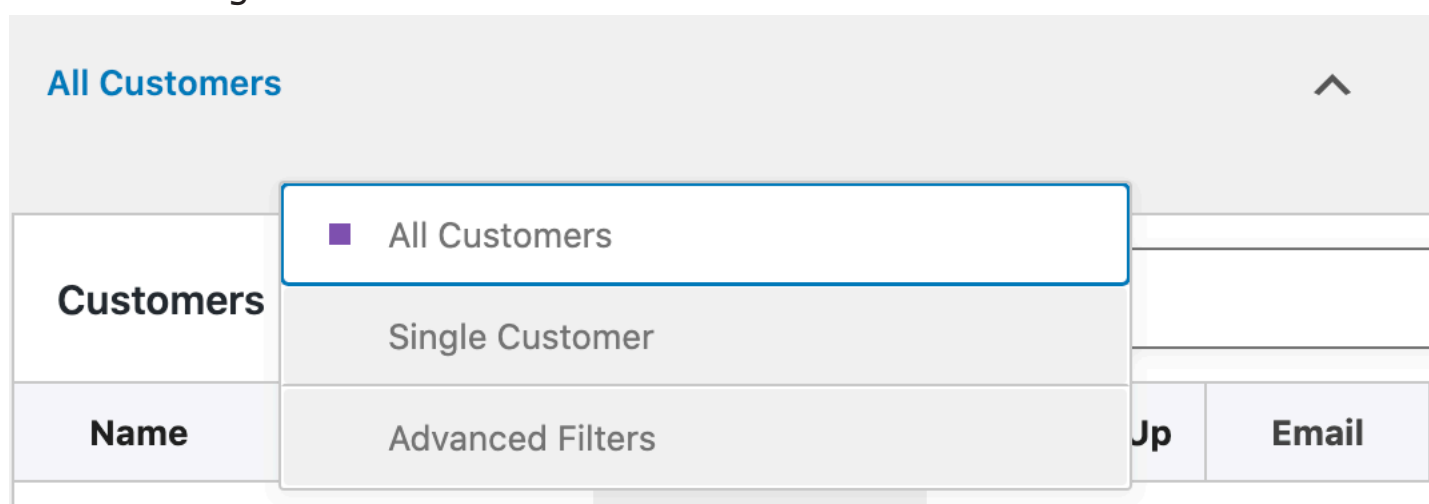


The screenshot shows the 'All Customers' dropdown menu open, displaying a table of customer data. The table has columns for Name, Username, Last Active, Sign Up, Email, Orders, Total Spend, AOV, and Country / Region. Below the table, summary statistics are displayed: 1 customer, 0 average orders, £-1.00 average lifetime spend, and £0.00 average order value.

Name	Username	Last Active	Sign Up	Email	Orders	Total Spend	AOV	Country / Region
		November 9, 2020	—		0	£-1.00	£0.00	

1 customer 0 average orders £-1.00 average lifetime spend £0.00 average order value

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

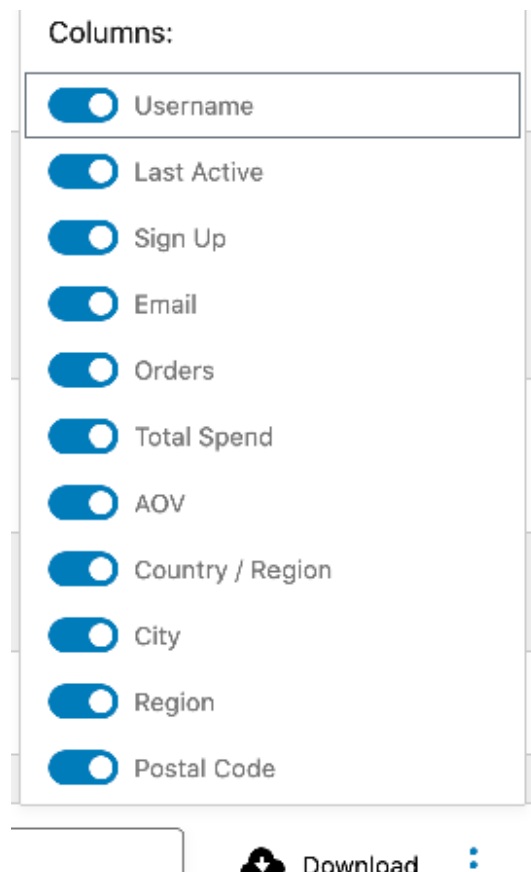
3.) If you click on the **Search by customer name** text box, you are able to input any customer name you desire to be shown.

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

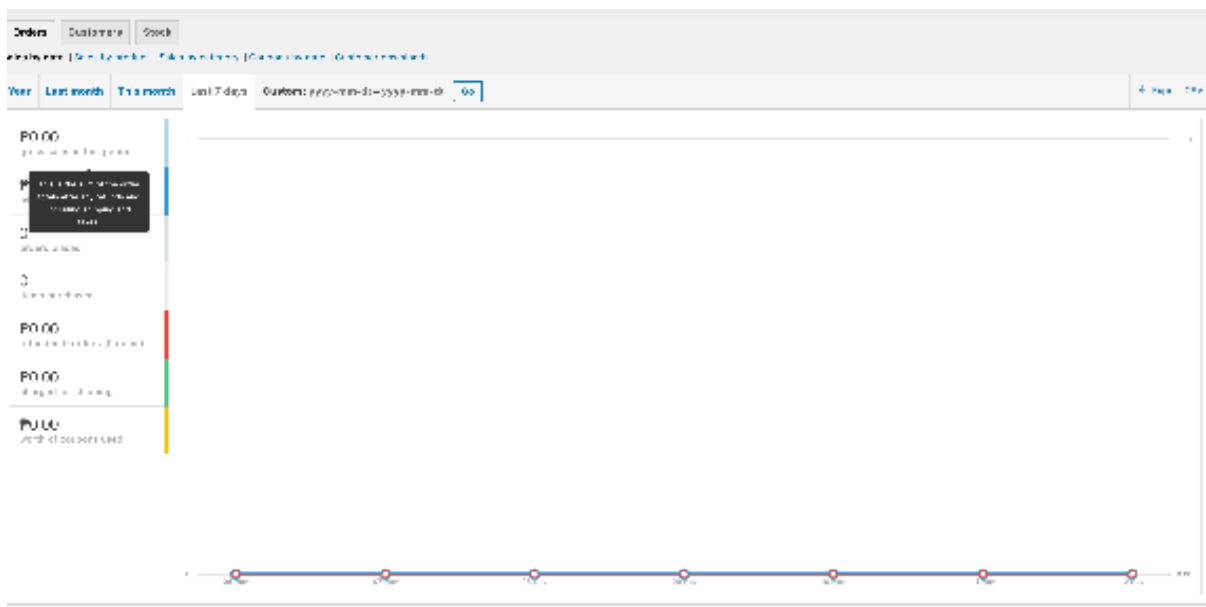
1.) Refer to Coupons under Marketing Tab

merce Tab

1 WooCommerce Tab

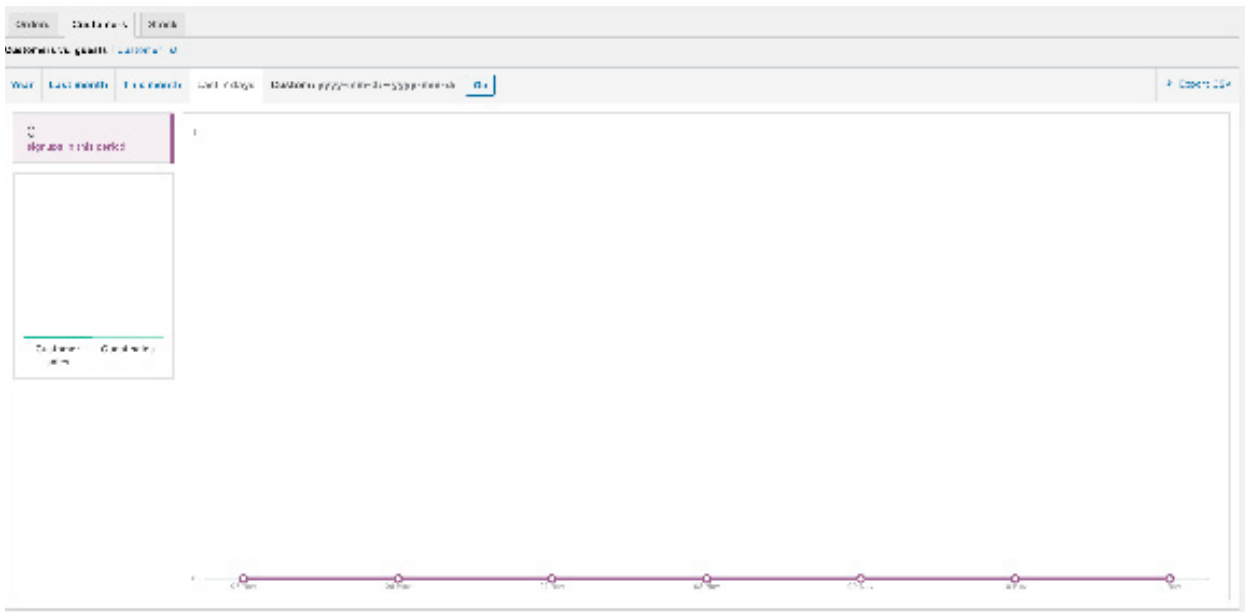
1.5 Reports

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.

1 WooCommerce Tab



3.) Under Stocks, you are able to sort the stock by low, high, or most stocked.

Orders

Customers

Stock

Low in stock

Out of stock

Most stocked

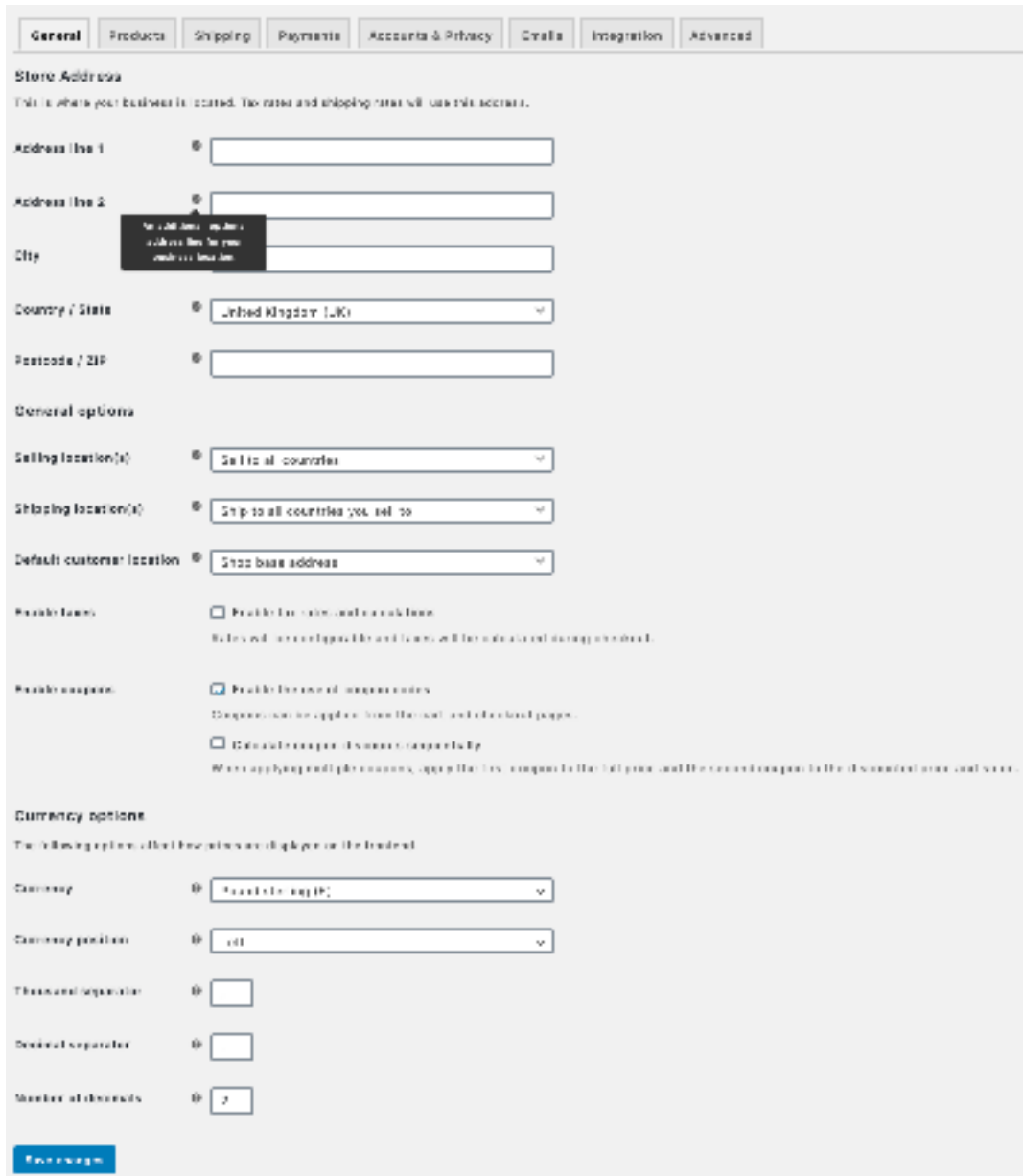
Product	Parent	Units in stock	Stock status	Actions
No low in stock products found.				
Product	Parent	Units in stock	Stock status	Actions

mercerce Tab

1 WooCommerce Tab

1.6 Settings

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



The screenshot displays the 'General' tab of the WooCommerce settings. The 'Store Address' section is active, showing fields for 'Address line 1', 'Address line 2', 'City', 'Country / State' (set to 'United Kingdom (UK)'), and 'Postcode / ZIP'. Below these are 'General options' for 'Selling location(s)', 'Shipping location(s)', and 'Default customer location'. The 'Currency options' section at the bottom includes fields for 'Currency' (set to 'Pound Sterling (£)'), 'Currency position' (set to 'left'), 'Thousand separator', 'Decimal separator', and 'Number of decimals' (set to '2'). A 'Save changes' button is at the bottom left.

General | Products | Shipping | Payments | Accounts & Privacy | Emails | Integration | Advanced

Store Address
This is where your business is located. Tax rates and shipping rates will use this address.

Address line 1

Address line 2

City

Country / State

Postcode / ZIP

General options

Selling location(s)

Shipping location(s)

Default customer location

Enable taxes
☐ Enable for taxes and calculations.
Taxes will be calculated for all orders with the state and during checkout.

Enable coupons
☒ Enable for use of discount codes.
Discounts can be applied from the cart and checkout pages.
☐ Enable to manage discount coupons fully.
When applying multiple coupons, apply the first coupon to the full price and the second coupon to the discounted price and so on.

Currency options
The following options affect how prices are displayed on the frontend.

Currency

Currency position

Thousand separator

Decimal separator

Number of decimals

Save changes

1 WooCommerce Tab

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

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

The screenshot shows the 'Products' tab in the WooCommerce settings. The 'Shop pages' section includes a dropdown for 'Shop page' set to 'Shop' and a note about its use in product permalinks. The 'Add to cart behaviour' section has two checkboxes: 'Redirect to the cart page after successful addition' (unchecked) and 'Enable AJAX add to cart buttons on archives' (checked). The 'Placeholder image' section has a text input set to '5'. The 'Measurements' section includes 'Weight unit' (kg) and 'Dimensions unit' (cm) dropdowns. The 'Reviews' section has 'Enable reviews' (checked) with sub-options 'Enable product reviews' (checked), 'Show "verified owner" label on customer reviews' (checked), and 'Reviews can only be left by "verified owners"' (unchecked). The 'Product ratings' section has 'Enable star rating on reviews' (checked) and 'Star ratings should be required, not optional' (checked). A 'Save changes' button is at the bottom left.

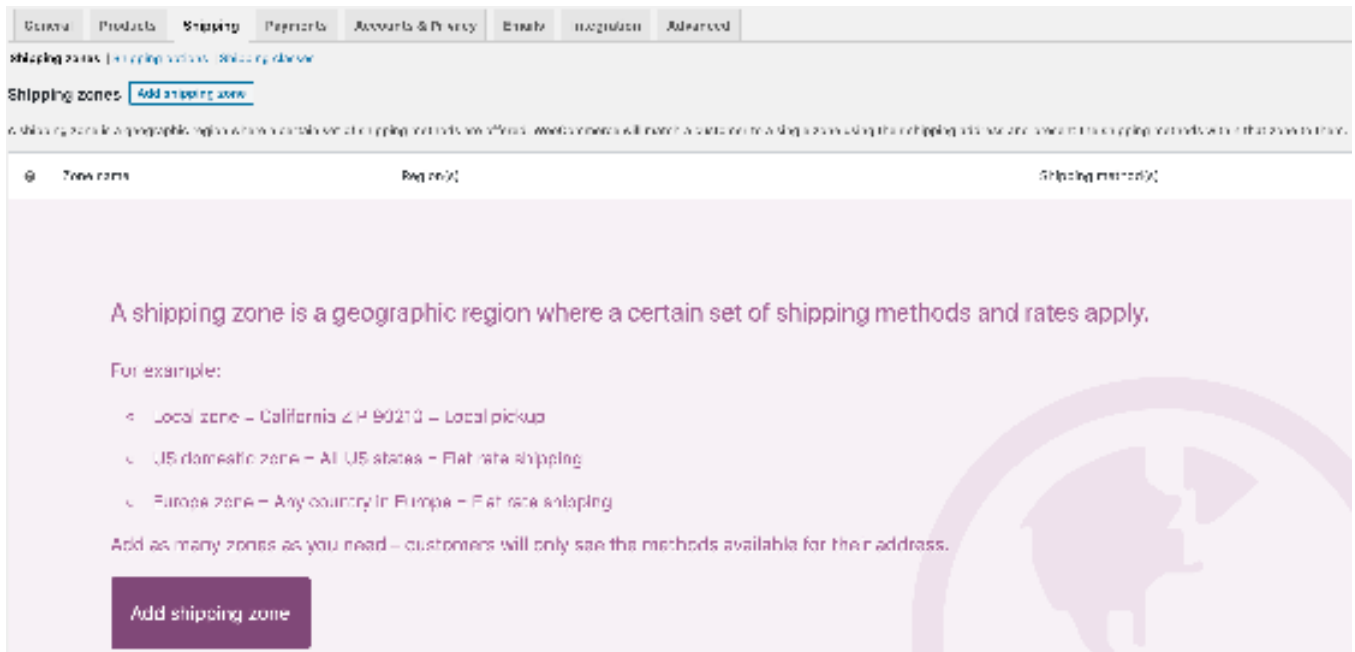
General	Products	Shipping	Payments	Accounts & Privacy	Emails	Integration	Advanced
<p>General Inventory Downloadable products</p> <h3>Shop pages</h3> <p>Shop page ⓘ <input type="text" value="Shop"/> x v The base page can also be used in your product permalinks.</p> <p>Add to cart behaviour</p> <p><input type="checkbox"/> Redirect to the cart page after successful addition</p> <p><input checked="" type="checkbox"/> Enable AJAX add to cart buttons on archives</p> <p>Placeholder image ⓘ <input type="text" value="5"/></p> <h3>Measurements</h3> <p>Weight unit ⓘ <input type="text" value="kg"/> v</p> <p>Dimensions unit ⓘ <input type="text" value="cm"/> v</p> <h3>Reviews</h3> <p>Enable reviews</p> <p><input checked="" type="checkbox"/> Enable product reviews</p> <p><input checked="" type="checkbox"/> Show "verified owner" label on customer reviews</p> <p><input type="checkbox"/> Reviews can only be left by "verified owners"</p> <p>Product ratings</p> <p><input checked="" type="checkbox"/> Enable star rating on reviews</p> <p><input checked="" type="checkbox"/> Star ratings should be required, not optional</p> <p>Save changes</p>							

WooCommerce Tab

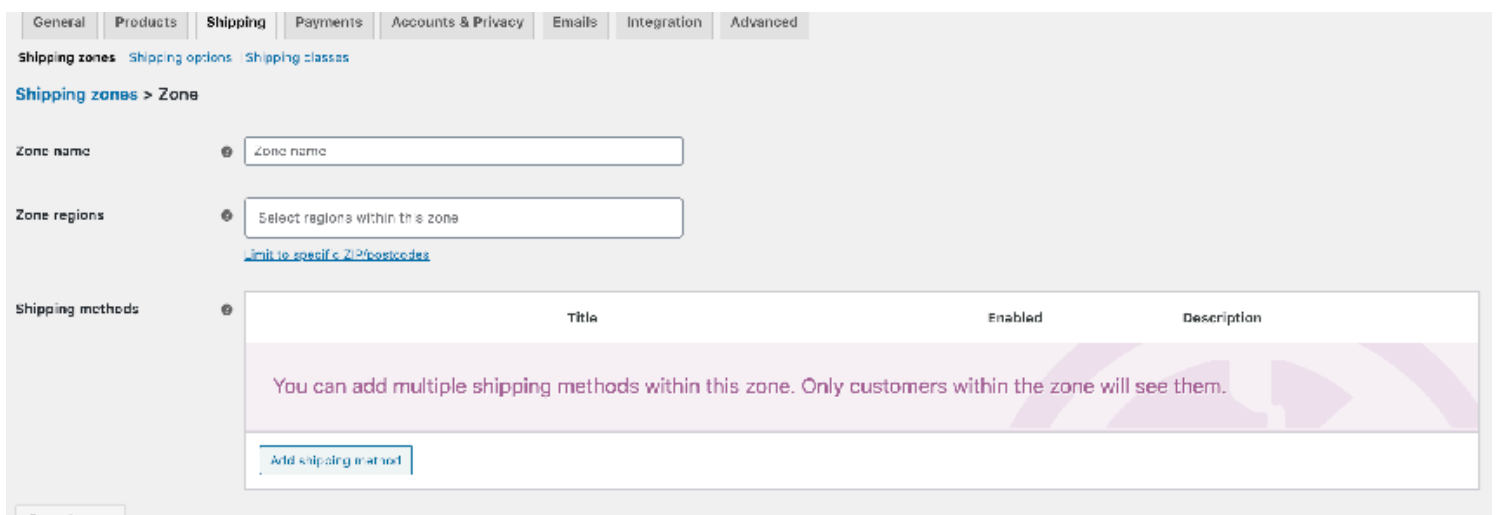
1 WooCommerce Tab

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.

General Products Shipping **Payments** Accounts & Privacy Emails Integration Advanced

Payment methods

Installed payment methods are listed below and can be sorted to control their display order on the frontend.

Method	Enabled	Description	
Direct bank transfer	<input type="checkbox"/>	Take payments in person via BACS. More commonly known as direct bank/wire transfer.	Set up
Check payments	<input type="checkbox"/>	Take payments in person via checks. This offline gateway can also be useful to test purchases.	Set up
Cash on delivery	<input type="checkbox"/>	Have your customers pay with cash (or by other means) upon delivery.	Set up
PayPal Standard - PayPal	<input type="checkbox"/>	PayPal Standard redirects customers to PayPal to enter their payment information.	Set up

[Save changes](#)

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

General Products Shipping Payments **Accounts & Privacy** Emails Integrations Advanced

Guest checkout

- ☒ Allow customers to place orders without an account
- ☐ Allow customers to log into an existing account during checkout

Account creation

- ☐ Allow customers to create an account during checkout
- ☐ Allow customers to create an account on the "My account" page
- ☒ When creating an account, automatically generate an account username for the customer based on their name, surname or email
- ☒ When creating an account, automatically generate an account password

Account status requests

- ☐ Remove personal data from orders on request
When handling an [account status request](#), should personal data within orders be retained or removed?
- ☐ Remove access to downloads on request
When handling an [account status request](#), should access to downloadable files be revoked and download logs cleared?

Personal data removal

- ☐ Allow personal data to be removed in bulk from orders
Add an option to the orders screen for removing personal data in bulk. Note that removing personal data cannot be undone.

Privacy policy

This section controls the display of your website privacy policy. The privacy notices below will not show up unless a [privacy page](#) is set.

Registration privacy policy

Use personal data will be used to support your experience (support the website, to manage accounts, to send account-related emails, and for other purposes described in our [privacy policy](#))

Checkout privacy policy

Use personal data will be used to process your order, support your account, and throughout the website, and for other purposes described in our [privacy policy](#)

Personal data retention

Choose how long to retain personal data once it is no longer needed for processing. Lower the following options which contain this data below.

Retain inactive accounts: or

Retain pending orders: or

Retain failed orders: or

Retain cancelled orders: or

Retain completed orders: or

[Save changes](#)

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

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

1 WooCommerce Tab

[illegible]

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

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

General

Products

Shipping

Payments

Accounts & Privacy

Emails

Integration

Advanced

MaxMind Geolocation

An integration for utilizing MaxMind to do Geolocation lookups. Please note that this integration will only do country lookups.

MaxMind License Key

The key that will be used when dealing with MaxMind Geolocation services. You can read how to generate one in [MaxMind Geolocation Integration documentation](#).

Database File Path

The location that the MaxMind database should be stored. By default, the integration will automatically save the database here.

Save changes

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.

General Products Shipping Payments Accounts & Privacy Emails Integration **Advanced**

Page setup [REST API](#) [Analytics](#) [Legacy API](#) [WooCommerce.com](#)

Page setup

These pages need to be set so that WooCommerce knows where to send users to checkout.

Cart page

Checkout page

My account page

Terms and conditions

Secure checkout ☐ Force secure checkout
Force SSL (HTTPS) on the checkout pages. [SSL Certificate is required.](#)

Checkout endpoints

Endpoints are appended to your page URL to send a specific action during the checkout process. They should be unique.

Pay

Order received

Add payment method

Delete payment method

Set default payment method

Account endpoints

Endpoints are appended to your page URL to send a specific action on the account pages. They should be unique and not be left blank to enable the endpoint.

Orders

View order

Download

Edit account

Reset password

Payment methods

Lost password

Logout

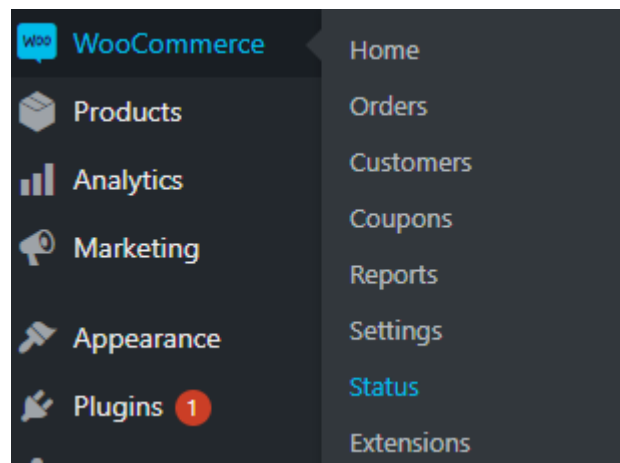
[Save changes](#)

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

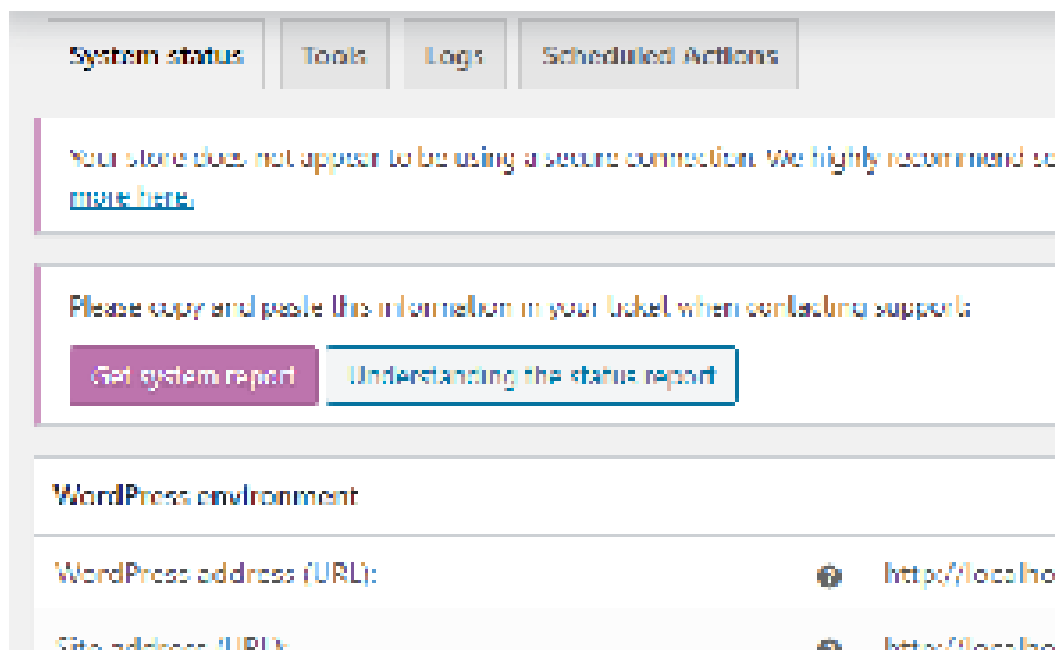
1 WooCommerce Tab

1.7 Status

1.) Go to WooCommerce » Status.



2.) After clicking the status, you will see the following display.



1 WooCommerce Tab

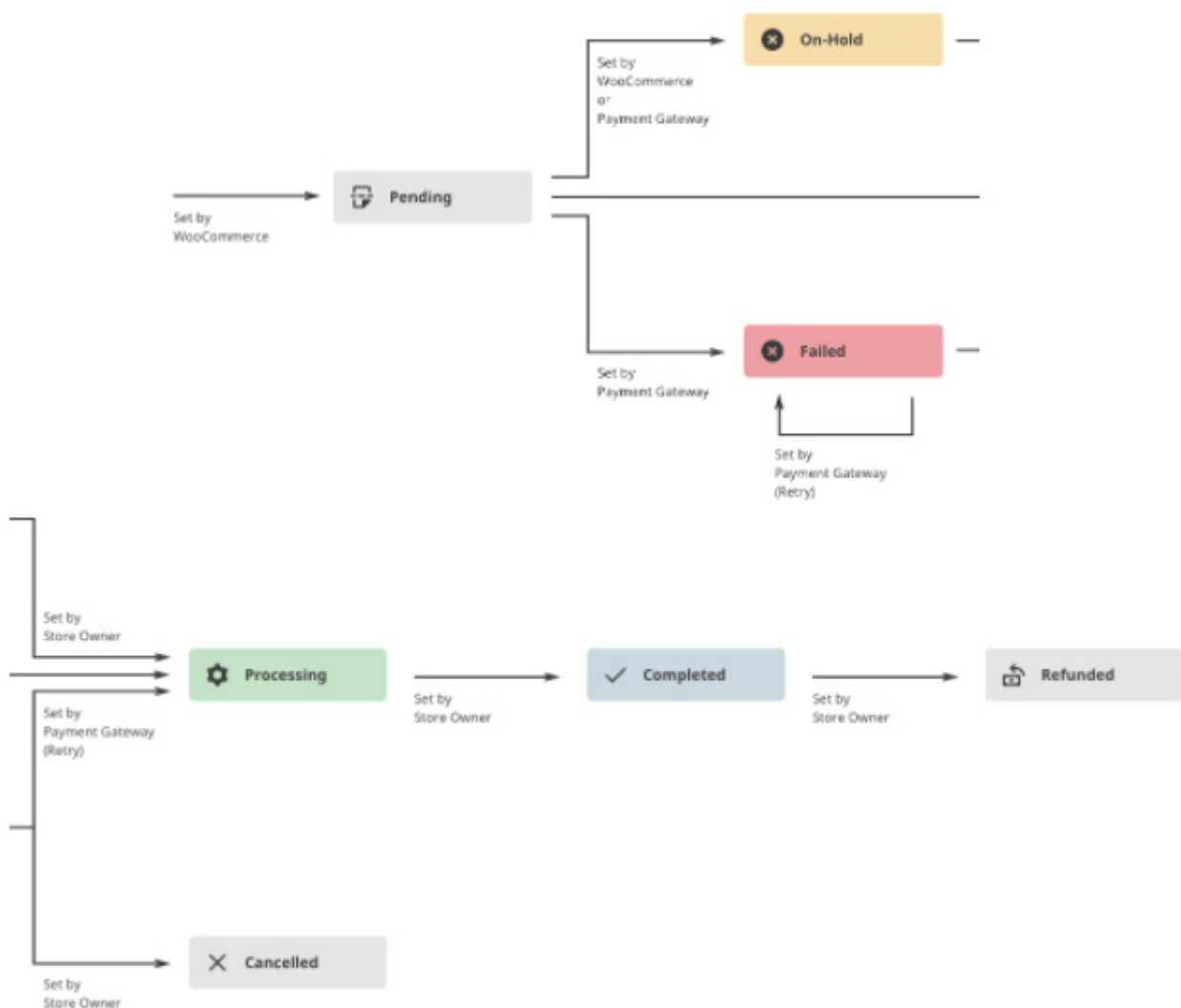
Note: An order also has a Status. Order statuses let you know how far along the order is, starting with “Pending payment” and ending with “Completed.” The following order statuses are used:

- 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.

1 WooCommerce Tab

Visual Diagram to Illustrate Order Statuses

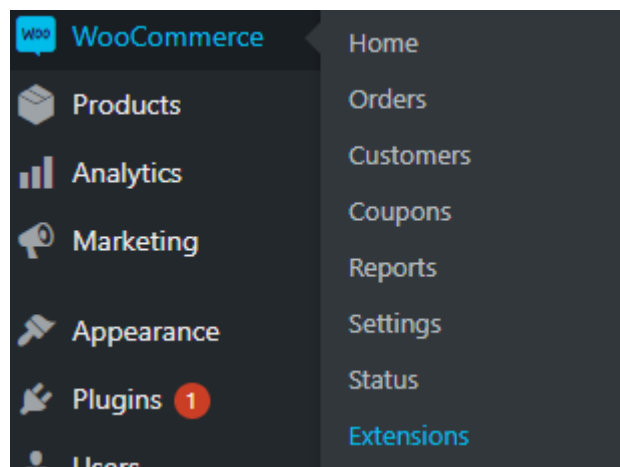
This visual representation follows an order through its statuses from “Pending payment” to “Completed”, “Canceled” or “Refunded.”



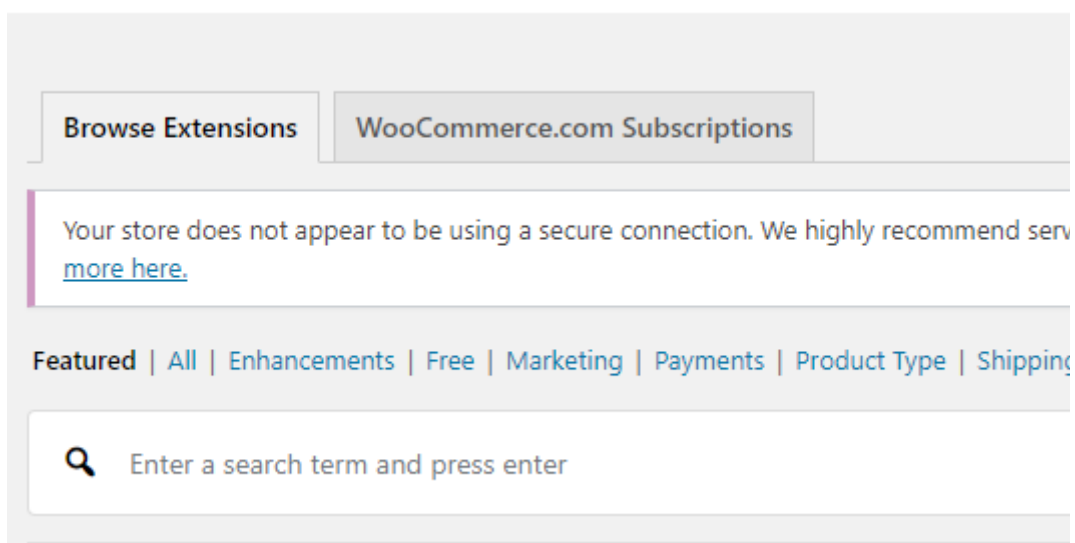
1 WooCommerce Tab

1.8 Extensions

1.) Go to WooCommerce Tab » Extensions.



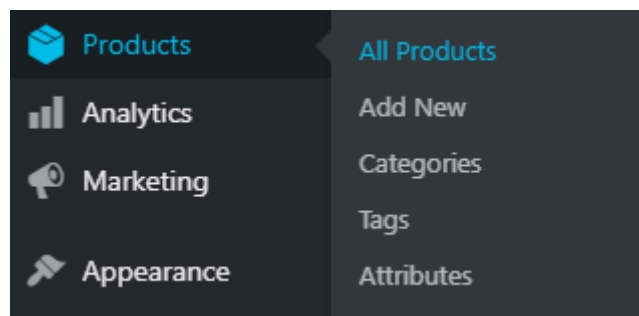
2.) Here you will see different extensions that you can install to your website, some Extensions cannot be installed unless you paid for it.






2 Products Tab

2.1 All Products

1.) Go to Products » All Products.



2.) After navigating you will see the display

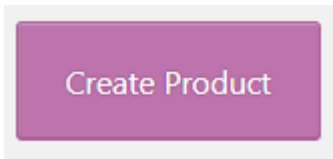
	Name	SKU	Stock
	Joy Dishwashing Liquid	–	In stock
	Name	SKU	Stock

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.

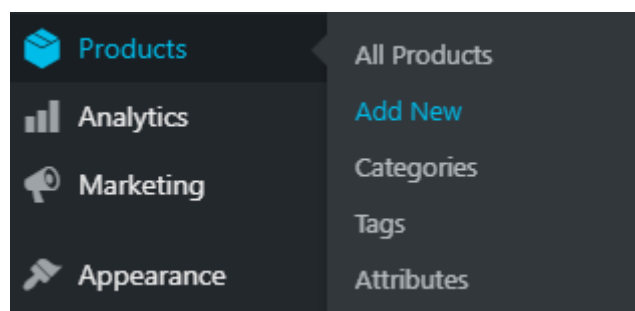
A rectangular button with a light blue border and a light blue background, containing the text "Start Import" in a dark blue font.

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

A rectangular button with a solid purple background and rounded corners, containing the text "Create Product" in a white font.

2.2 Add New

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



Products T


2 Products Tab

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

Product name

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

Product short description

 Add Media

Paragraph ▼

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☰

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: ☐ I

🔧 General

Regular price (£)

📦 Inventory

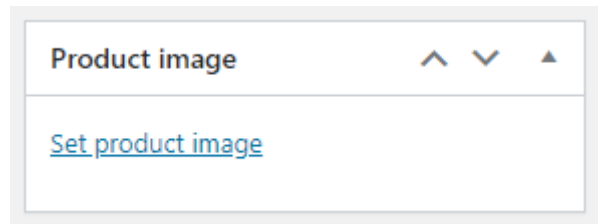
Sale price (£)

🚚 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 dragging or browsing and selecting an image.

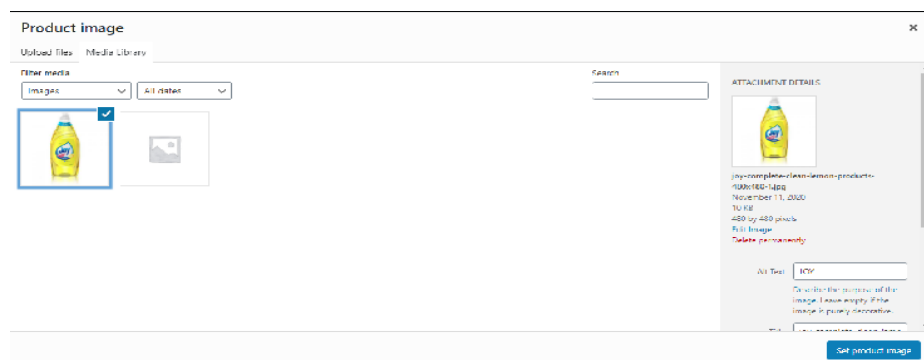
Drop files to upload

or

Select Files

Maximum upload file size: 40 MB.

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

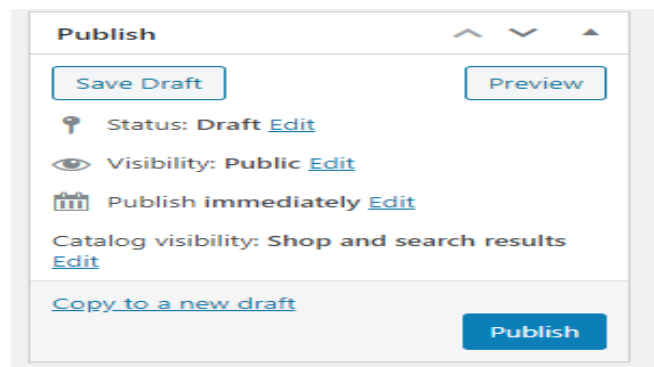


Products

T

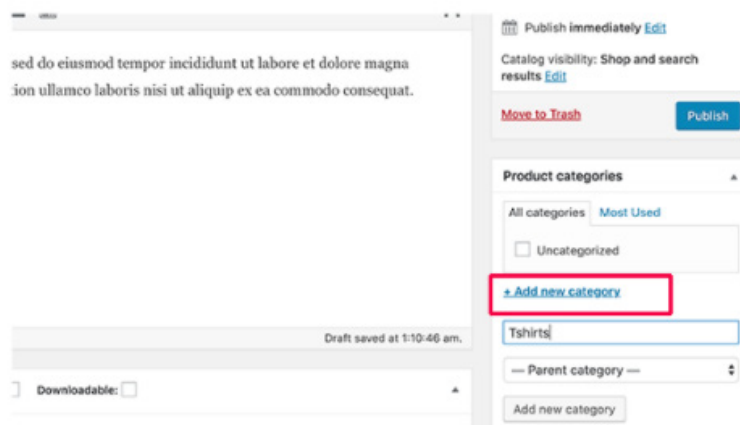
2 Products Tab

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



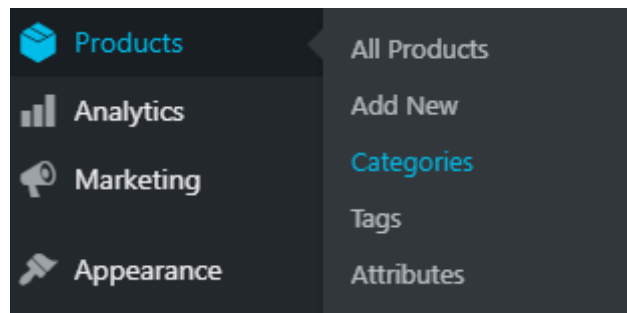
2.3 Categories

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

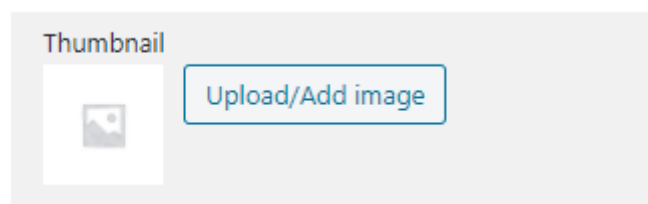
2.) You can also go to Products » Categories.



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.

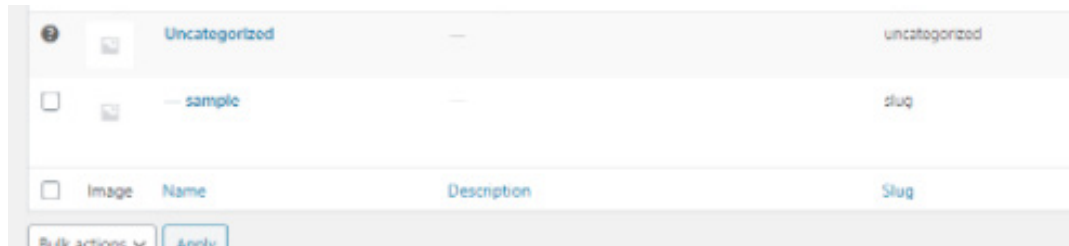


7.) After Clicking the Add new category Button.

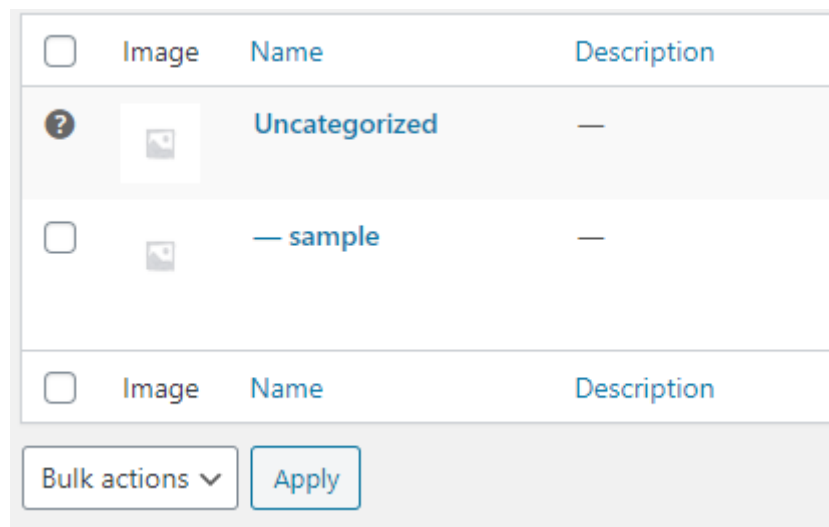
8.) You will see the added category on your top right corner.

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

Product data — Simple product Virtual: ☐ Downloadable: ☐

General

Regular price (\$)

Sale price (\$) [Schedule](#)

Inventory

Shipping

Linked Products

Attributes

Advanced

Get more options

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.

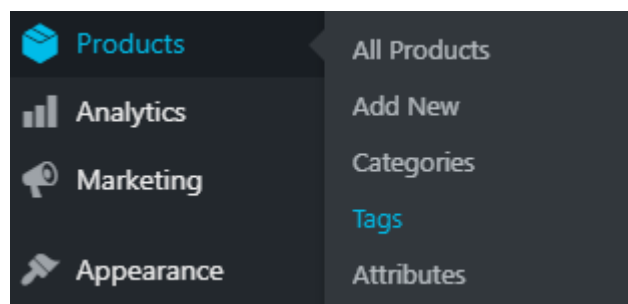
Product short description

Add Media

Paragraph B I [List Icons] [Quote Icon] [Link Icon] [Unlink Icon] [More Icons]

P

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



Products

T

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.

<input type="checkbox"/> Name	Description	Slug	Count
<input type="checkbox"/> Tag 1	sample	sample-tag-1	0
<input type="checkbox"/> Tag 2	sample sample	sample-tag-2	0
<input type="checkbox"/> Name	Description	Slug	Count

Bulk actions ▾
Apply
2 items

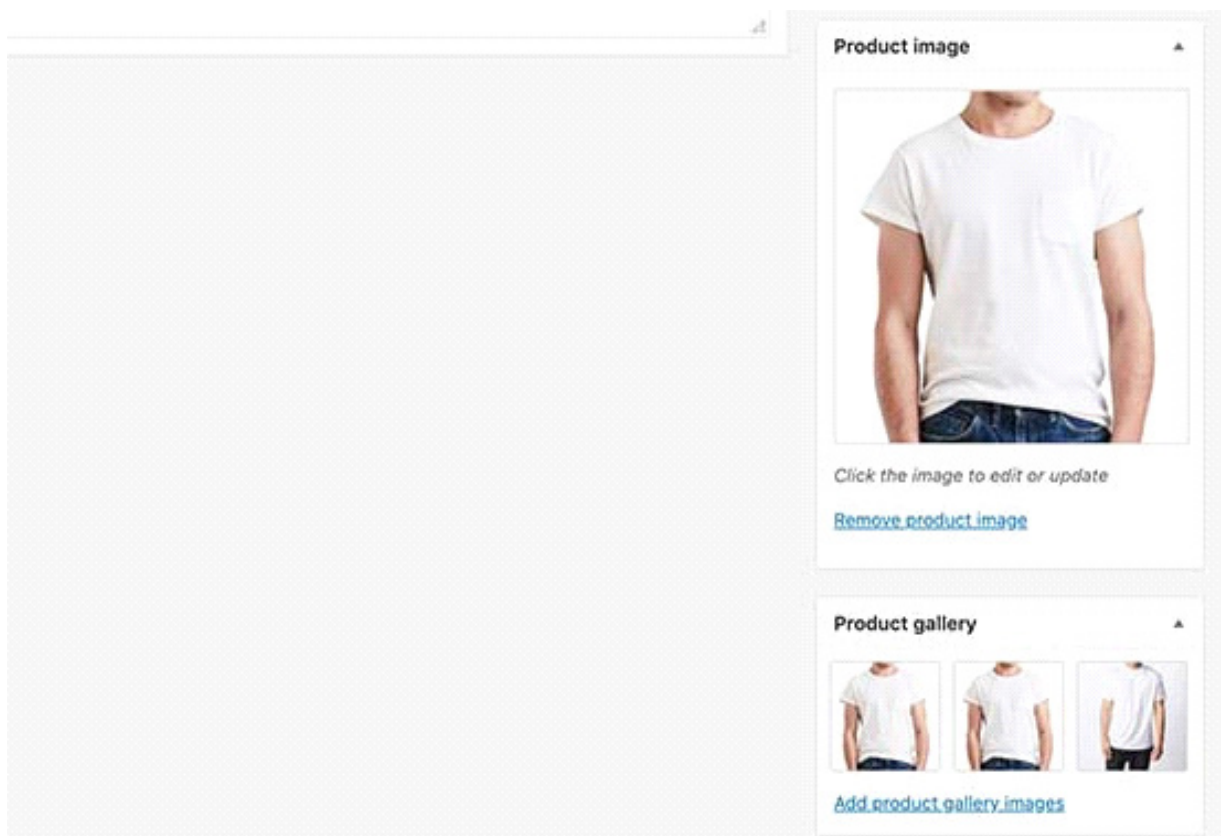
6.) If everything is alright and set, click the Apply button.

Bulk actions ▾
Apply

2 Products Tab

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.

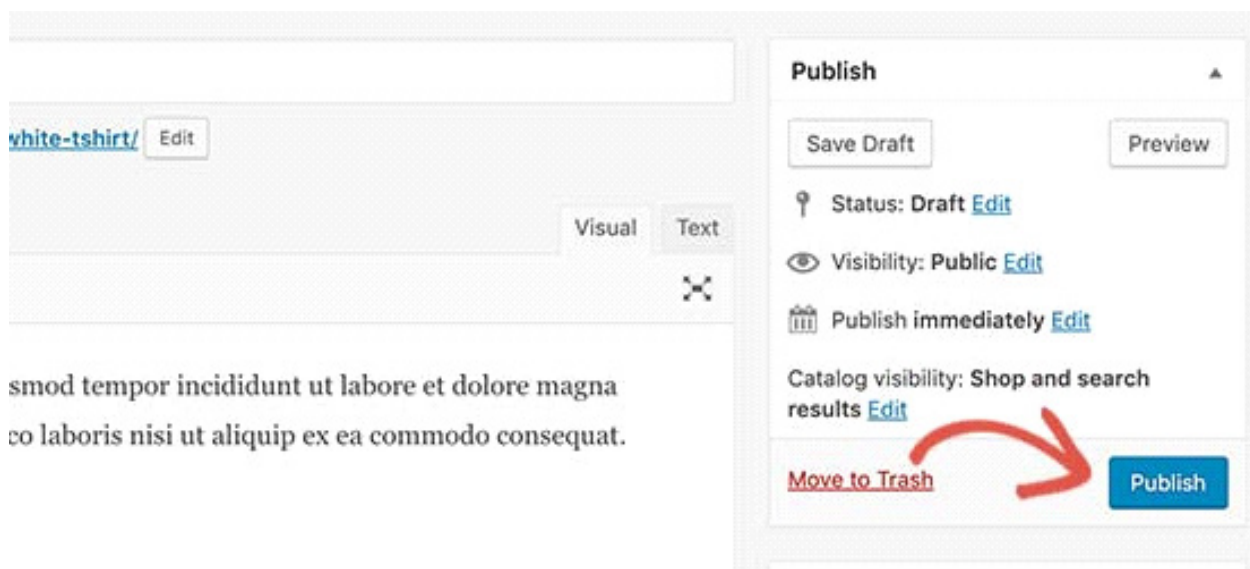


2.) You can add multiple images to create an image gallery of your product.

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.



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.

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	£0.00	0	0
0%	0%	0%	

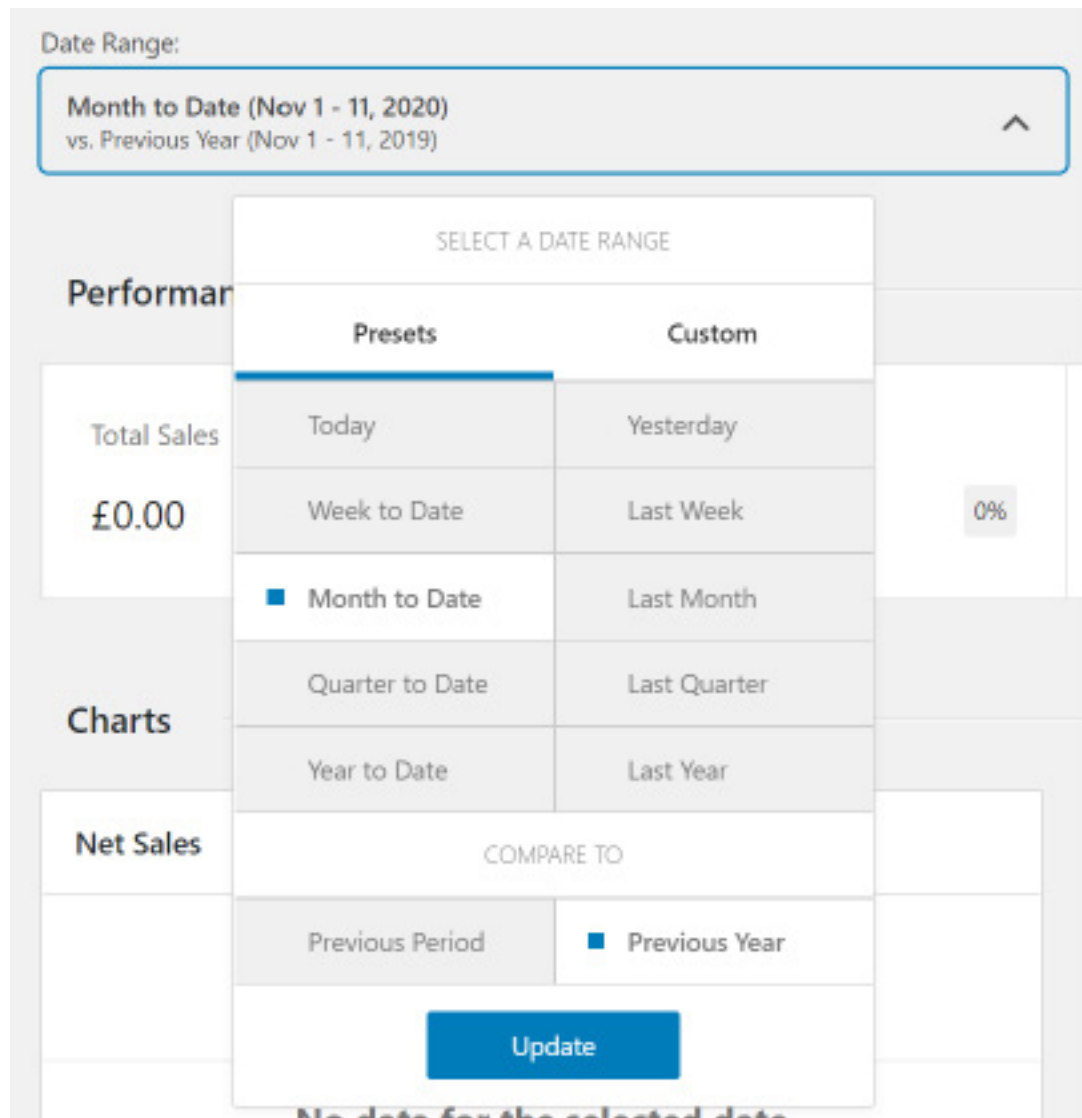
Date Range:

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

Tab

3 Analytics Tab

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




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.


SELECT A DATE RANGE

Presets

Custom

 mm/dd/yyyy

to

 mm/dd/yyyy

←

November 2020

→

Mo

Tu

We

Th

Fr

Sa

Su

1

2

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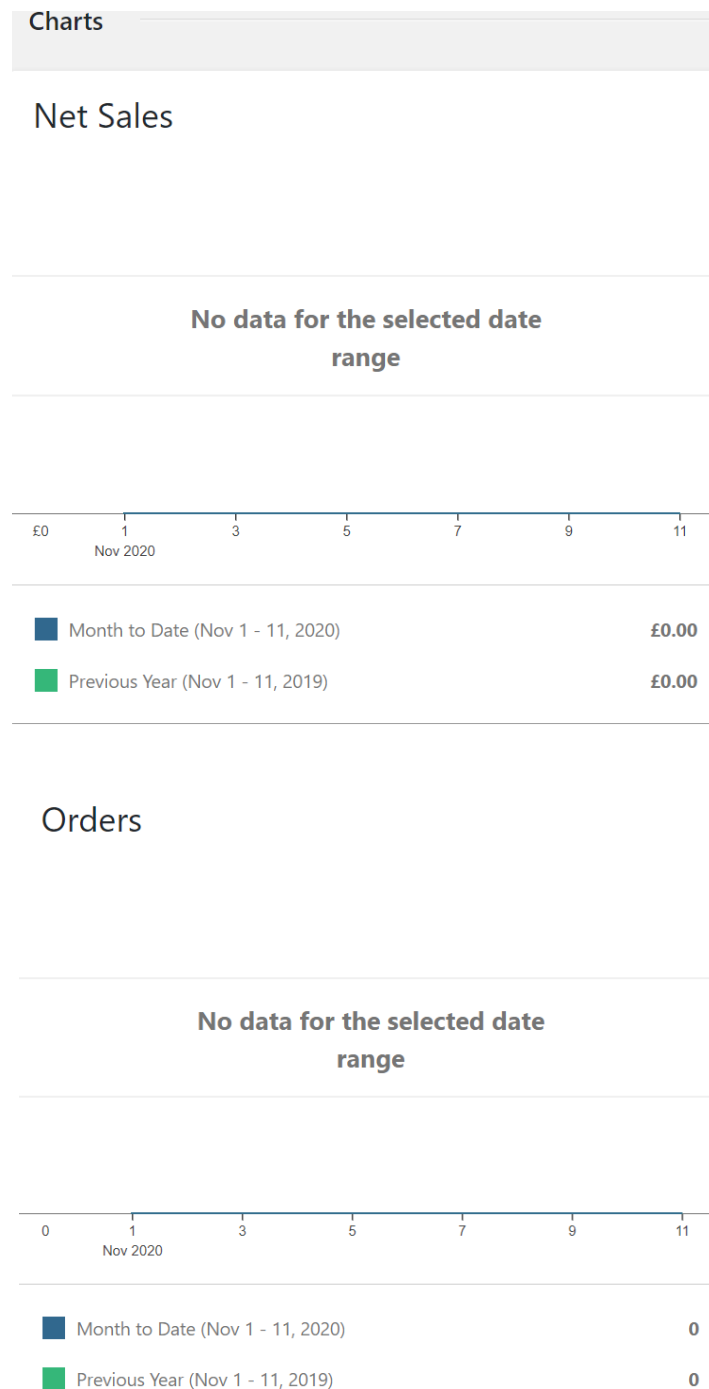
COMPARE TO

Previous Period

☒ Previous Year

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.



3 Analytics Tab

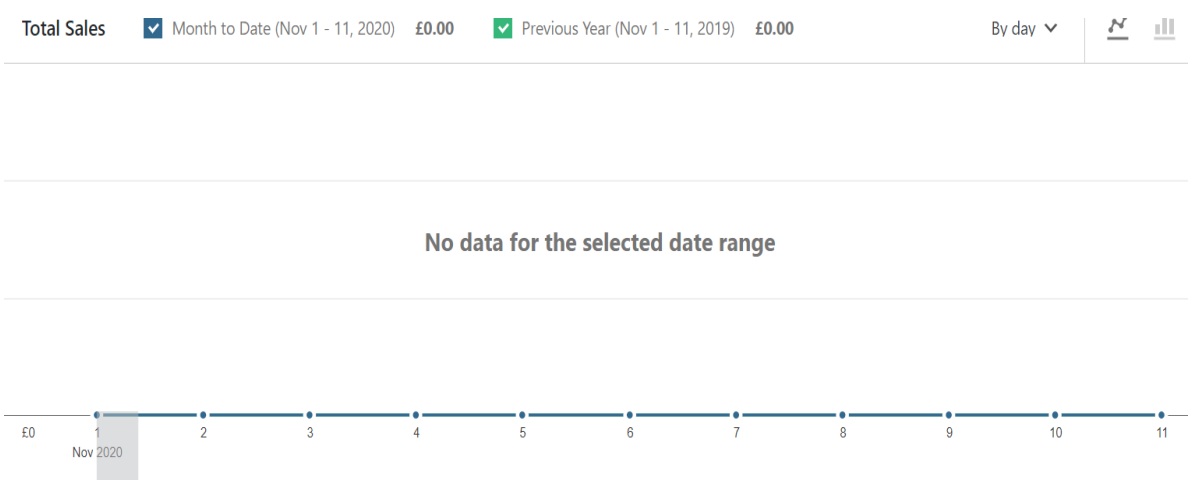
3.2 Revenue

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 £0.00 0%	Returns £0.00 0%	Coupons £0.00 0%	Net Sales £0.00
Taxes £0.00 0%	Shipping £0.00 0%	Total Sales £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.



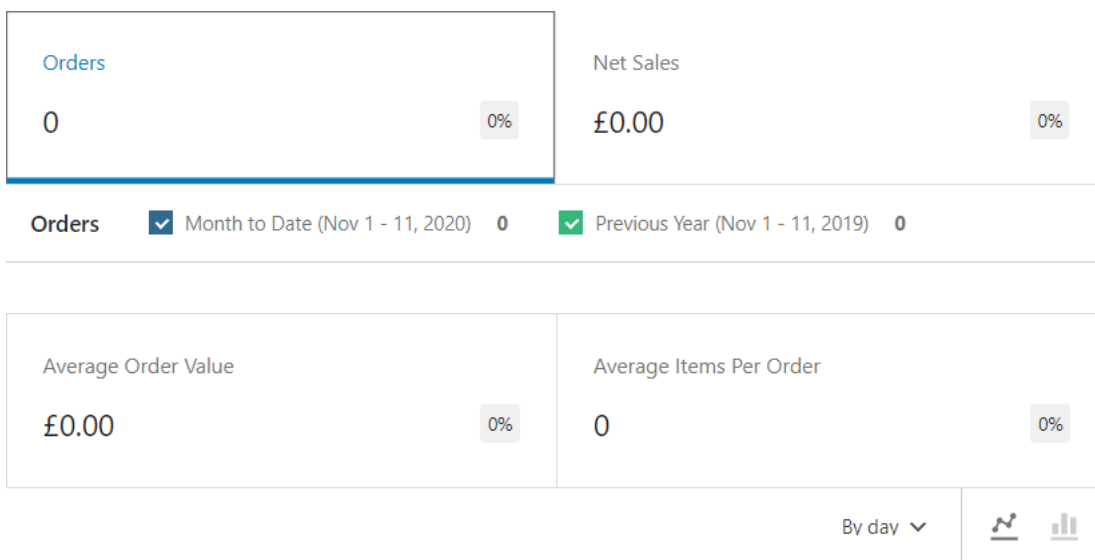
3 Analytics Tab

Revenue								Download 
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
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								

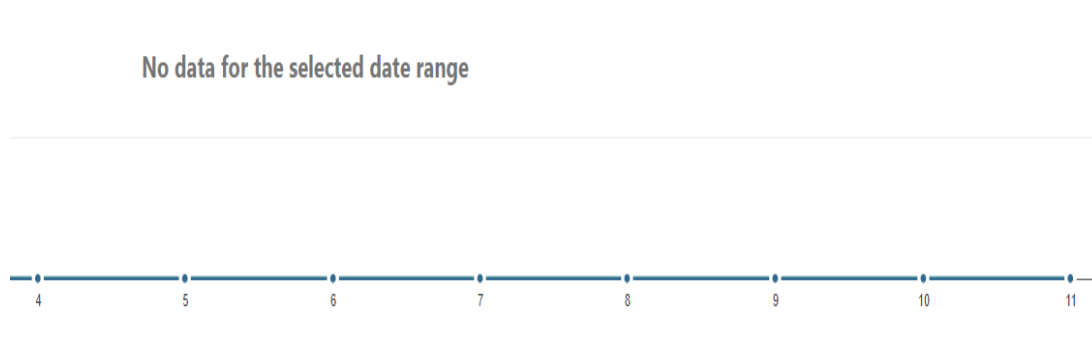
3 Analytics Tab

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.



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



3 Analytics Tab

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

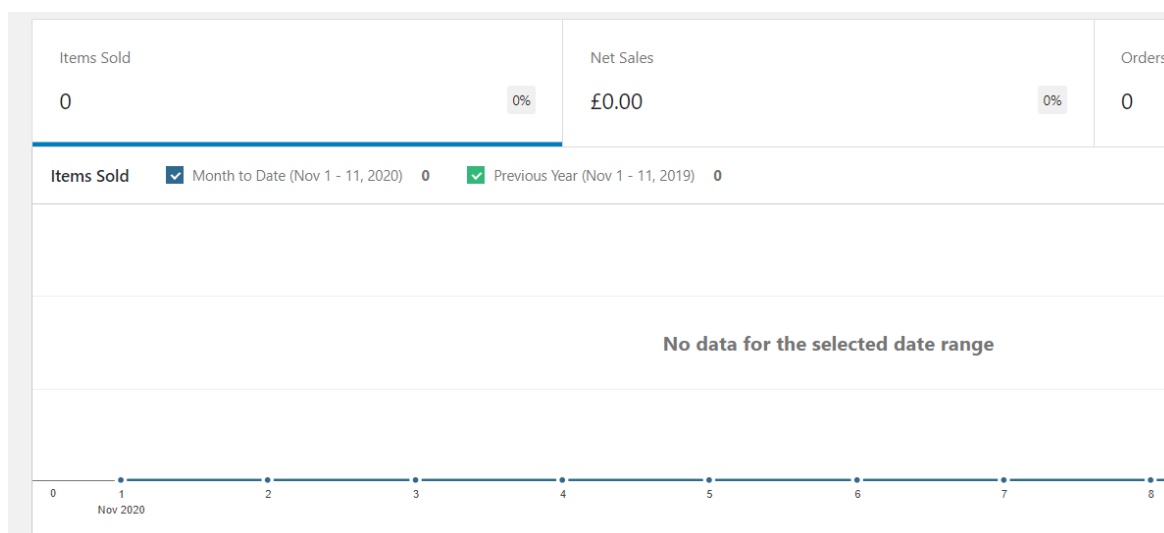


A screenshot of a web interface element. It features a light gray rectangular background. At the top left of this background is the text "Show:". Below this text is a white rectangular dropdown menu with a thin gray border. Inside the dropdown menu, the text "Advanced Filters" is displayed in a dark gray font. To the right of this text, within the same menu, is a small dark gray downward-pointing chevron icon.

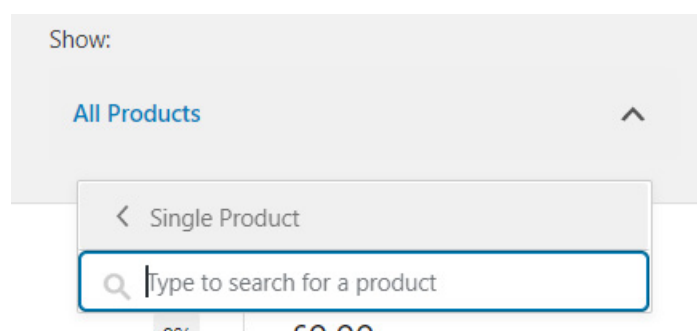
3 Analytics Tab

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.



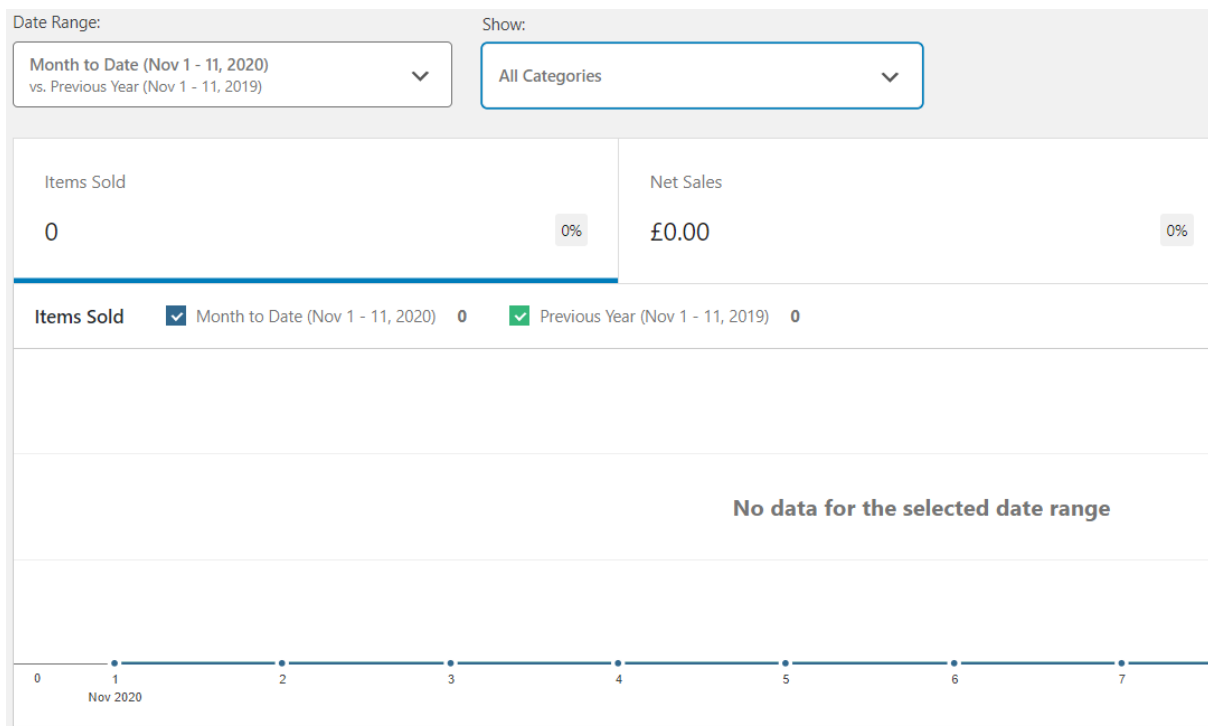
2.) A show labeled dropbox can be found beside the date range which is used for searching a specific product and compare them by clicking on it and type in the product name.



3 Analytics Tab

3.5 Categories

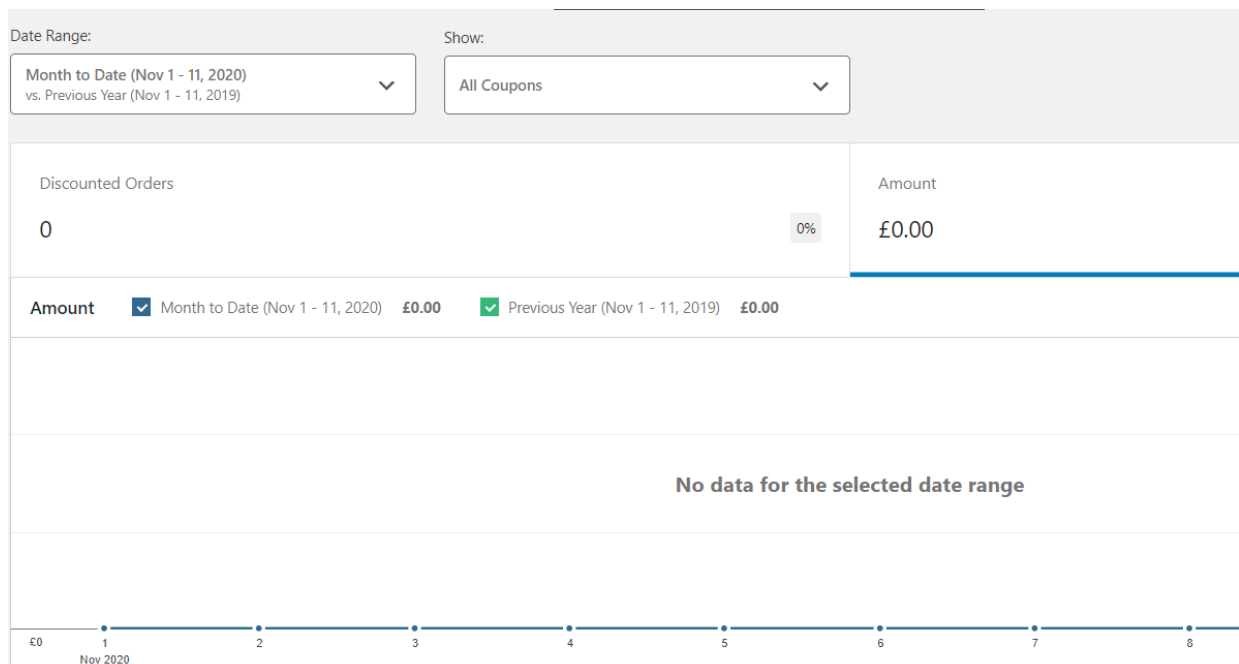
1.) The categories tab is the same layout as the product tab with the total category of items sold, net sales and orders. The show dropbox button is also displayed to search any specific categories and compare them with the chart below.



3 Analytics Tab

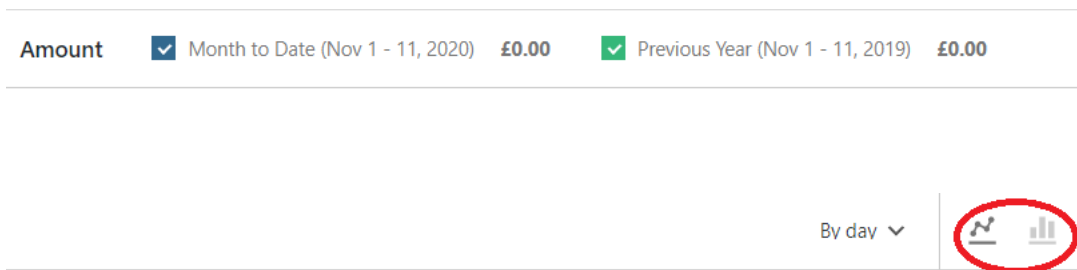
3.6 Coupons

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.



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

Compare

Total Tax	Order Tax	Shipping Tax
£0.00 <div>0%</div>	£0.00 <div>0%</div>	£0.00 <div>0%</div>

Total Tax

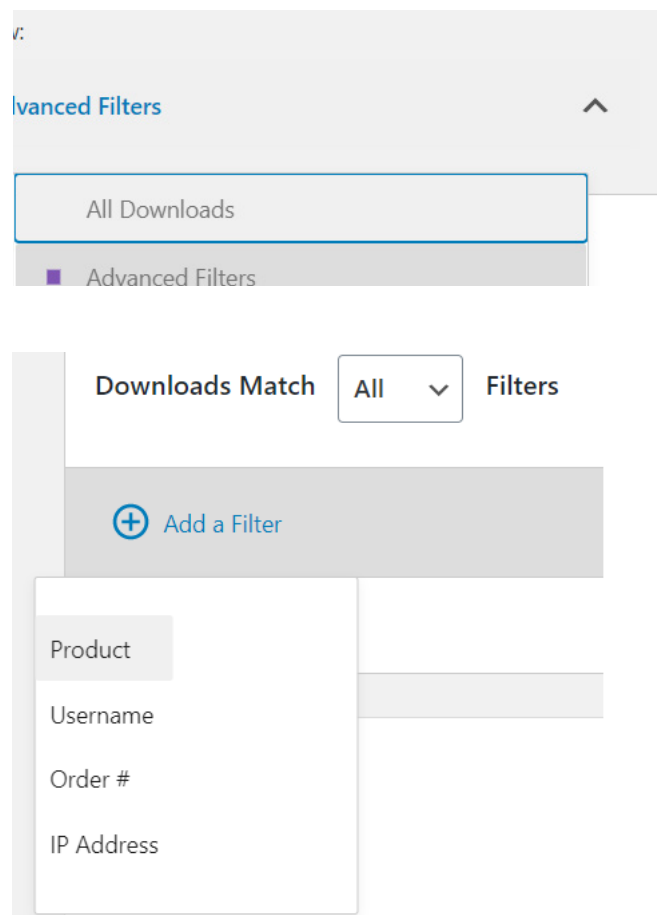
3 Analytics Tab

3.8 Downloads

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



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.







3 Analytics Tab

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

Downloads Match

All ▼

Filters

Product	Includes ▼	 Search
Username	Includes ▼	 Search customer username
Order #	Includes ▼	 Search order number
IP Address	Includes ▼	 Search IP address

Filter

[Clear all filters](#)

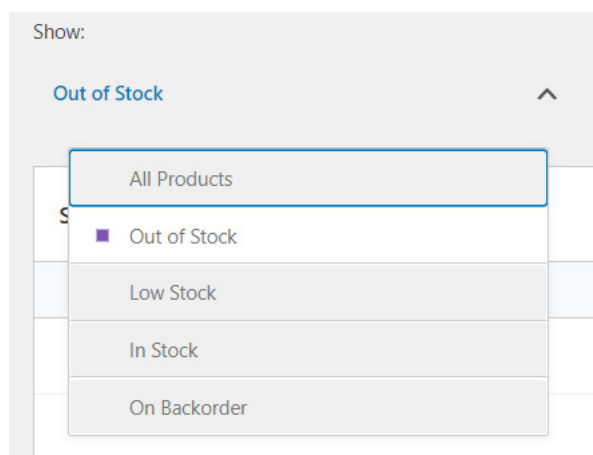
3 Analytics Tab

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.

Stock ⋮			
Product / Variation	SKU	^ Status	Stock
No data to display			
products out of stock low stock on backorder in stock			

2.) The show dropdown 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 Analytics 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:

- ☒ Pending payment
- ☐ Processing
- ☐ On hold
- ☐ Completed
- ☒ Cancelled
- ☒ Failed

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

Actionable Statuses:

- ☐ Pending payment
- ☒ Processing
- ☒ 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 choose the default date range below for your whole business then press save settings.

Default Date Range:

Date Range:

Month to Date (Nov 1 - 12, 2020)
vs. Previous Year (Nov 1 - 12, 2019)

Select a default date range. When no range is selected, the default date range is used.

[Reset Defaults](#)[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.

Recommended extensions

Great marketing requires the right tools. Take your marketing to the next level with our recommended ma



AutomateWoo

Convert and retain customers with automated marketing that does the hard work for you.



Mailchimp for WooCommerce

Send targeted campaigns, recover abandoned carts and more with Mailchimp.



Google Ads & Marketing by Kliken

Get in front of shoppers and drive traffic so you can grow your business with Smart Shopping Campaigns and free listings.



HubSpot for WooCommerce

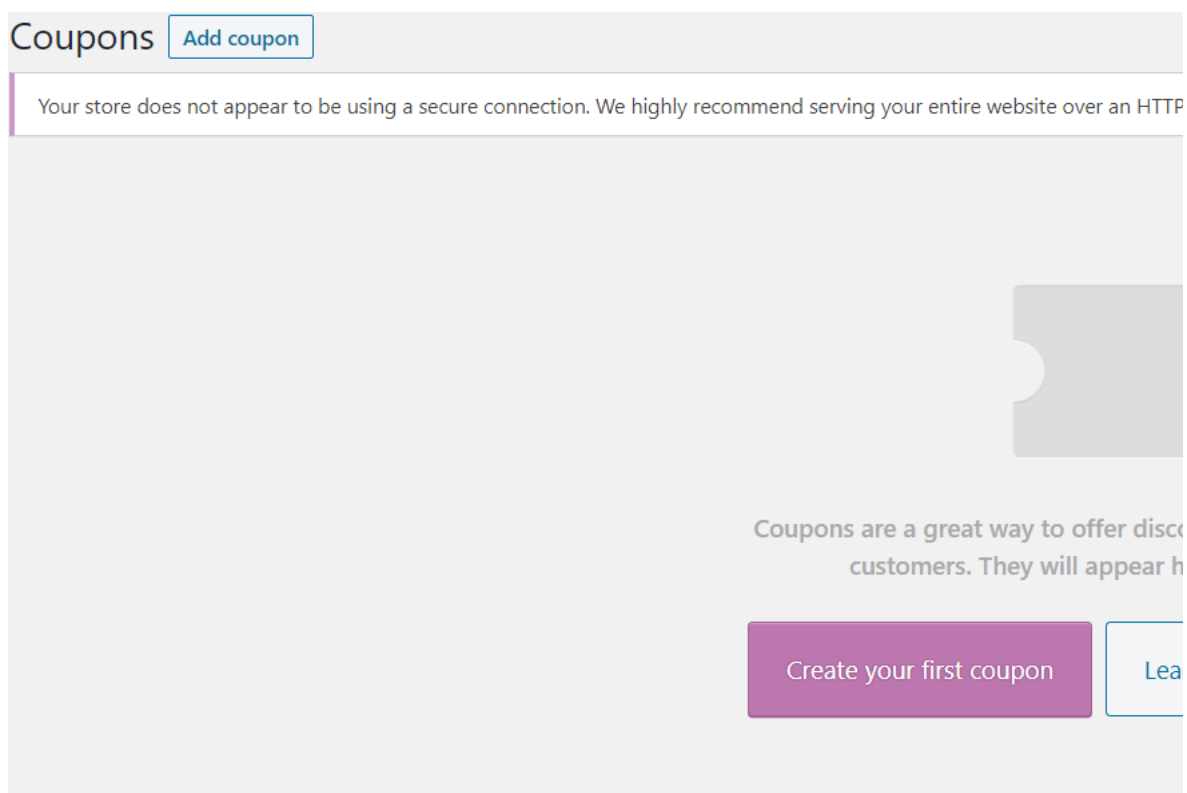
Grow traffic, convert leads, close deals, and turn customers into promoters.

Marketing

4 Marketing Tab

4.2 Coupons

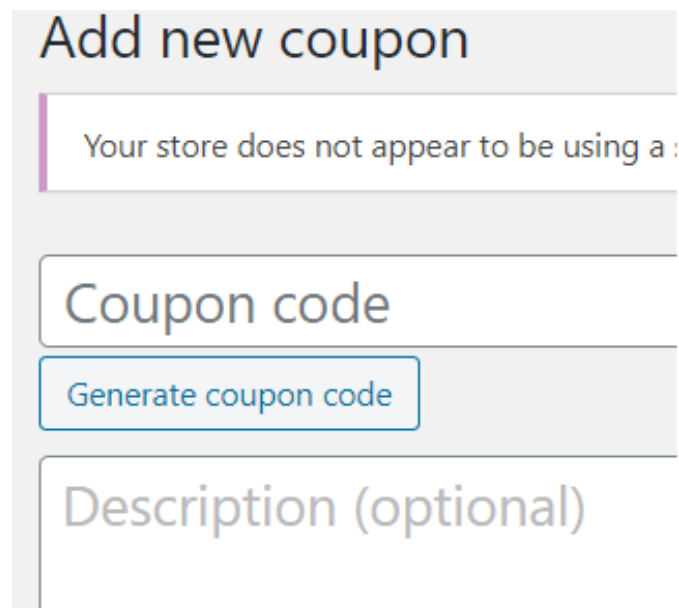
1.) Coupons tab in marketing is where you will create your discounted products or coupons to be sold.



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.



Add new coupon

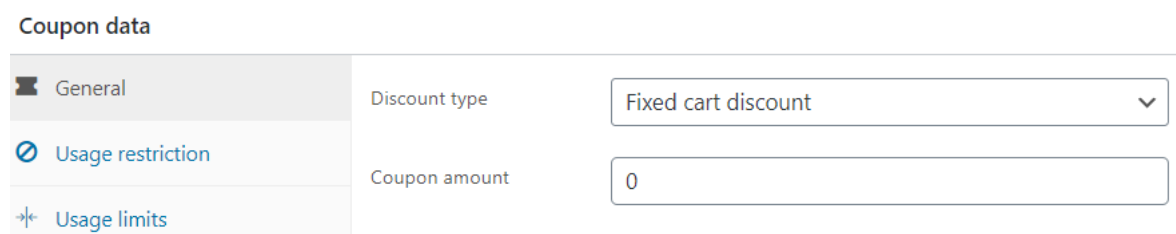
Your store does not appear to be using a :

Coupon code

Generate coupon code

Description (optional)

3.) Below that is the coupon data 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.



Coupon data

General	Discount type	Fixed cart discount
Usage restriction	Coupon amount	0
Usage limits		

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