

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

Project in OJT - November 04, 2020

18 pages

Submitted to:
Michael Angelo Salvio

Submitted by:
Albert Benedicto
Bryan Damasco
Ryan Panes
Warlo Belandres

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.

Overview

Table of content

1	WooCommerce	4
	1.1 Home	6
	1.2 Orders	8
	1.3 Customers	10
	1.4 Coupons	11
	1.5 Reports	13
	1.6 Settings	15
	1.7 Status	16
	1.8 Extensions	21
2	Products	23
	2.1 All Products	25
	2.2 Add New	26
	2.3 Categories	27
	2.4 Tags	29
	2.5 Attributes	30
3	Analytics	33
	3.1 Overview	35
	3.2 Revenue	38
	3.3 Orders	40
	3.4 Products	41
	3.5 Categories	42
	3.6 Coupons	44
	3.7 Taxes	45
	3.8 Downloads	46
	3.9 Stocks	47
	3.10 Settings	50
4	Marketing	51
	4.1 Overview	54
	4.2 Coupons	55

OBJECTIVES:

- To learn to blah blah
- Learn to

1 WooCommerce Tab

1.1 Home

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%

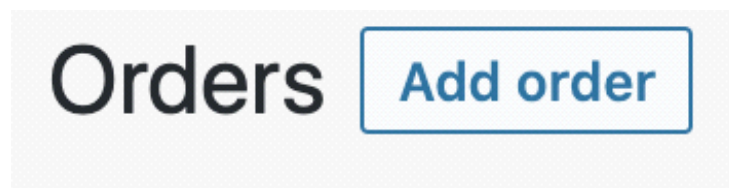
[View detailed stats](#)

mercerce Tab

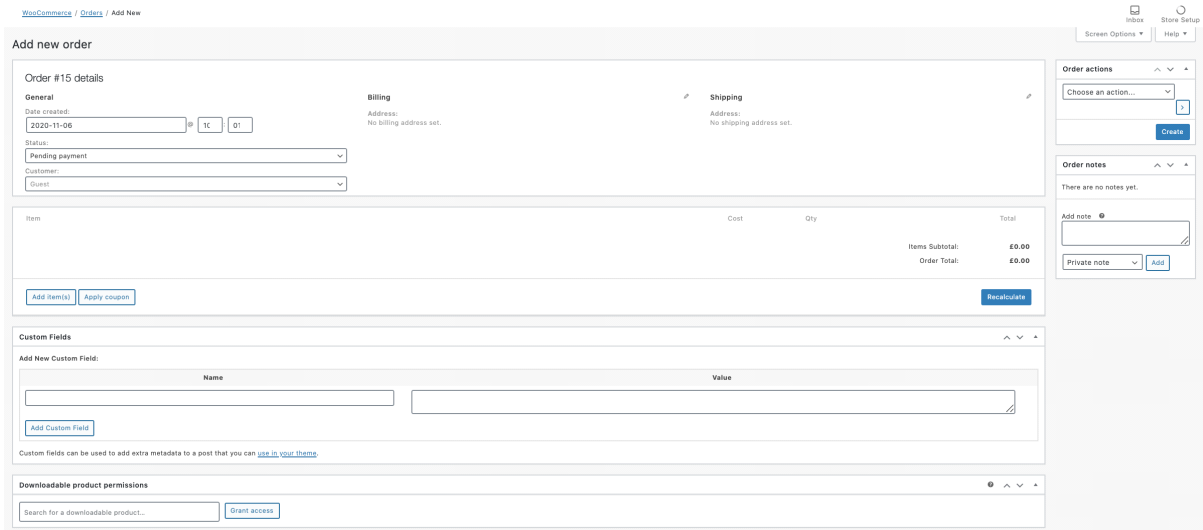
1 WooCommerce Tab

1.2 Orders

1.) Click on Add Order so that you are able to access the next page.



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 contains several sections for creating a new order. The 'Order #15 details' section includes fields for 'Date created' (2020-11-06), 'Status' (Pending payment), and 'Customer' (Guest). The 'Billing' section has an 'Address' field with the text 'No billing address set.' The 'Shipping' section also has an 'Address' field with the text 'No shipping address set.' Below these sections is a table for items with columns for 'Item', 'Cost', 'Qty', and 'Total'. The 'Items Subtotal' is £0.00 and the 'Order Total' is £0.00. There are buttons for 'Add item(s)', 'Apply coupon', and 'Recalculate'. The 'Custom Fields' section allows adding new custom fields with 'Name' and 'Value' fields. The 'Downloadable product permissions' section has a search field and a 'Grant access' button. On the right side, there are sections for 'Order actions' (Choose an action...), 'Order notes' (There are no notes yet), and 'Add note' (Add note, Private note, Add).

1 WooCommerce Tab

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

Order #16 details

General

Date created:

2020-11-06 @ 13 : 19

Status:

Pending payment ▼

Customer:

Guest ▼

Billing

[Load billing address](#)

First name

Last name

Company

Address line 1

Address line 2

City

Postcode / ZIP

Country / Region

United Kingdom (... ▼

State / County

Email address

Phone

Payment method:

N/A ▼

Transaction ID

Shipping

[Load shipping address](#) [Copy billing address](#)

First name

Last name

Company

Address line 1

Address line 2

City

Postcode / ZIP

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

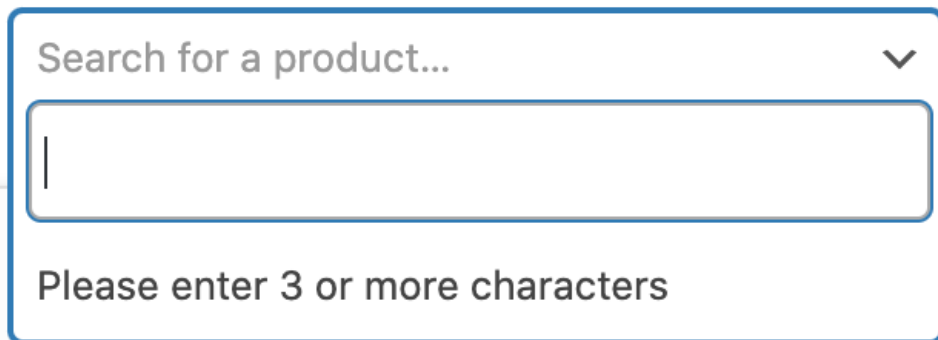
×

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

Add

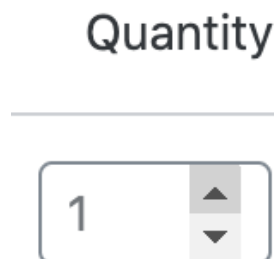
1 WooCommerce Tab

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



A search dialog box with a title bar "Search for a product..." and a dropdown arrow. Below the title bar is a text input field with a vertical cursor. At the bottom of the dialog, it says "Please enter 3 or more characters".

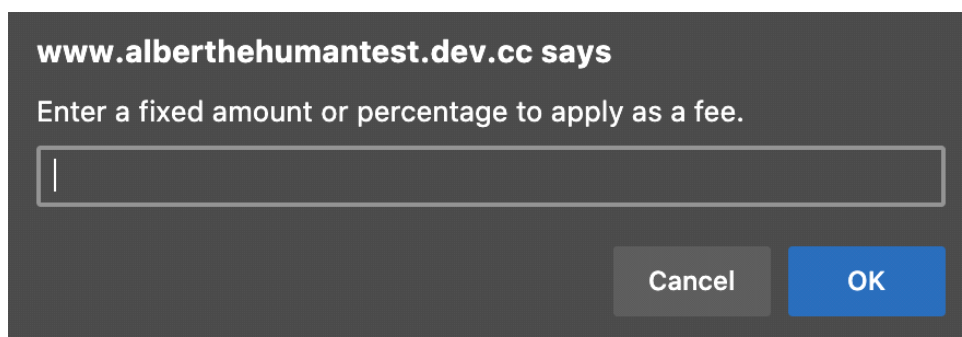
11.) Under quantity, you are able to edit the number of the existing item.



A quantity spinner control with the label "Quantity" above it. The spinner shows the number "1" and has up and down arrows for adjustment.

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.





A dark-themed pop-up dialog box titled "www.alberthehumantest.dev.cc says". The text inside says "Enter a fixed amount or percentage to apply as a fee." Below this is a text input field. At the bottom right are two buttons: "Cancel" and "OK".

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.

Item	Cost	Qty	Total
 £10.00 fee			£10.00
 10% fee			£1.00
Items Subtotal:			£0.00
Fees:			£11.00
Order Total:			£11.00

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.

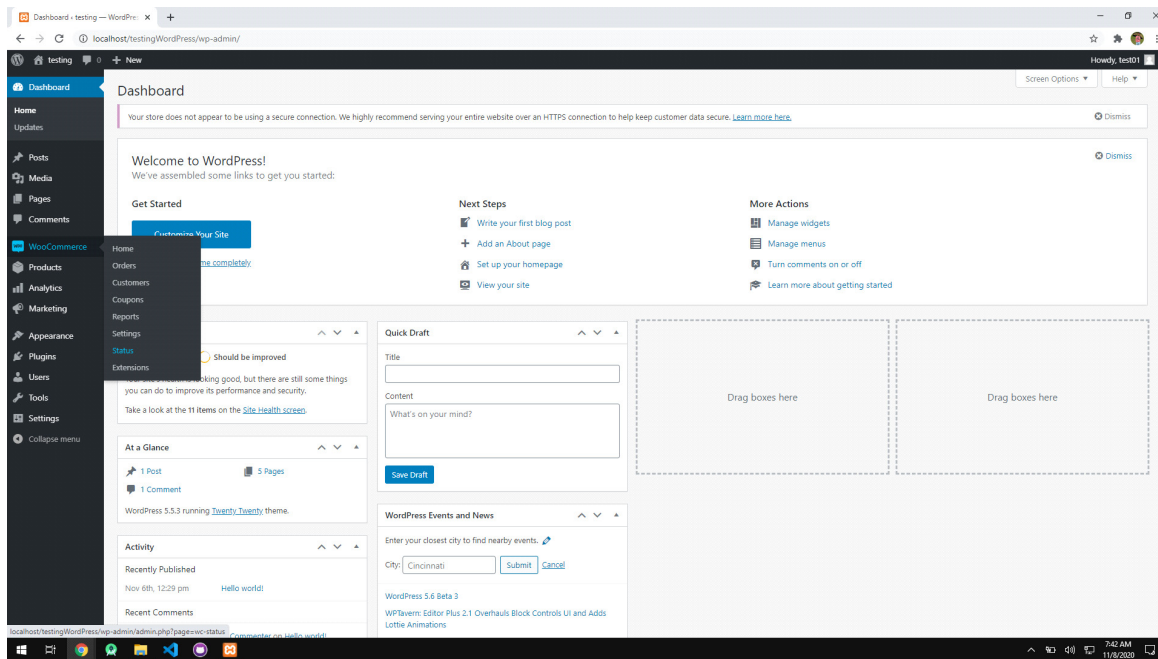
Item	Cost	Qty	Total
 £10.00 fee			£10.00  

17.) Click on the pencil icon and now you are able to edit your -----

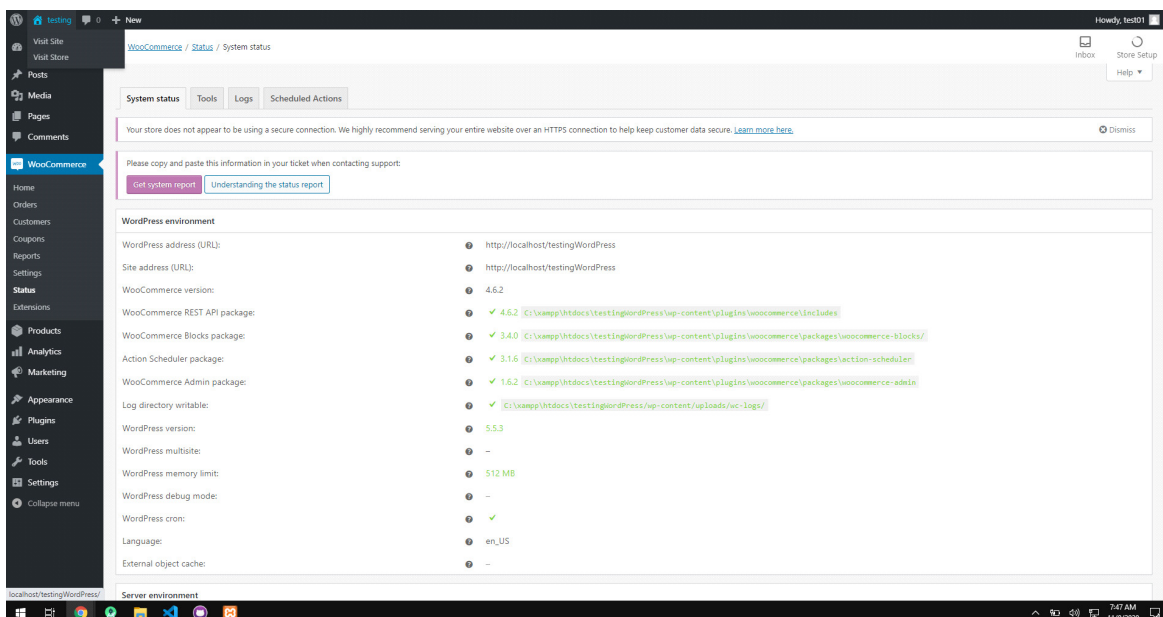
1 WooCommerce Tab

1.7 Status

1.) Go to WooCommerce » Status.



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



1 WooCommerce Tab

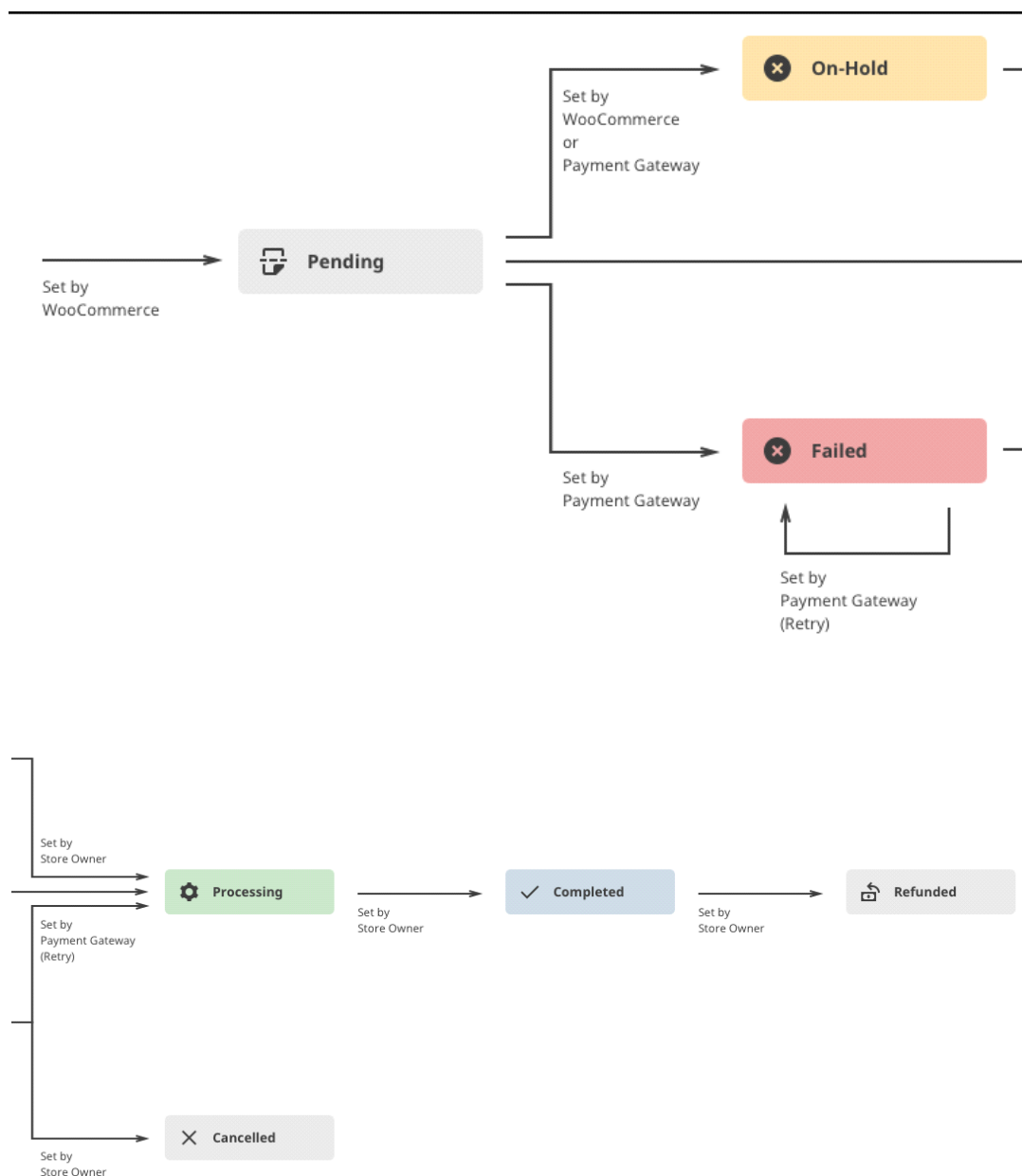
3.) An order also has a Status. Order statuses let you know how far along the order is, starting with “Pending payment” and ending with “Completed.” The following order statuses are used:

- ☐ 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."

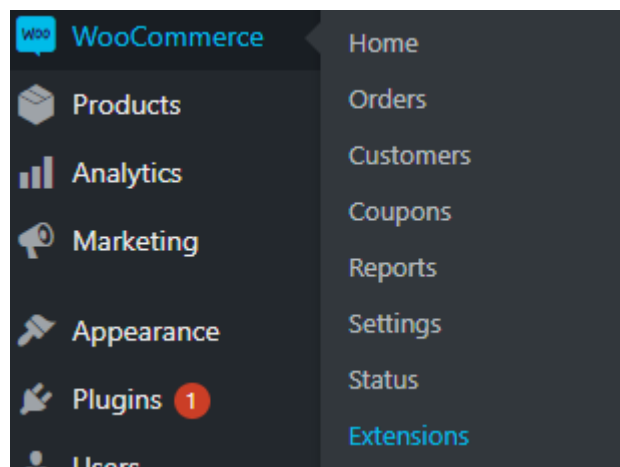


WooCommerce Tab

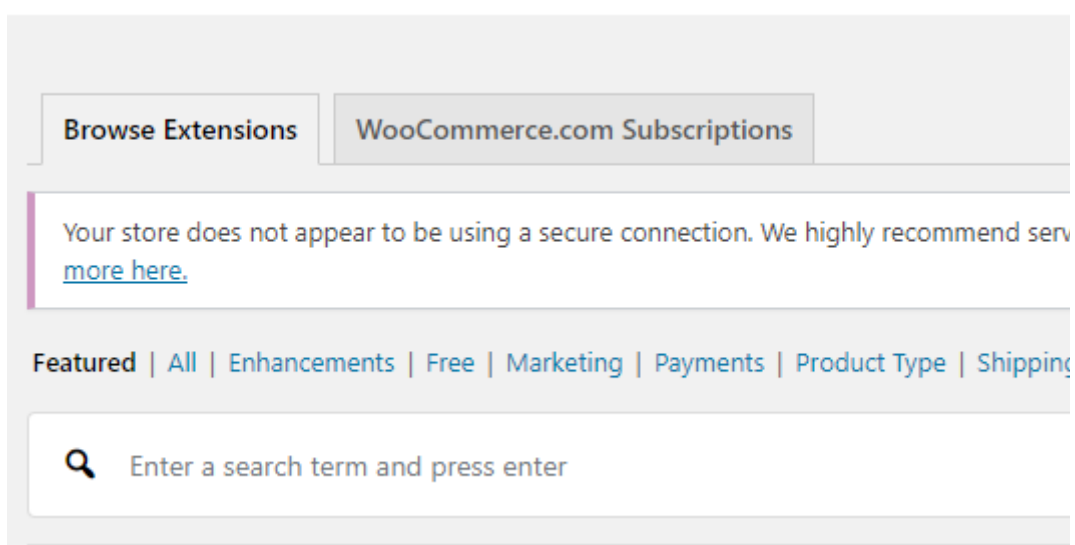
1 WooCommerce Tab

1.8 Extensions

1.) Go to WooCommerce Tab » Extensions.



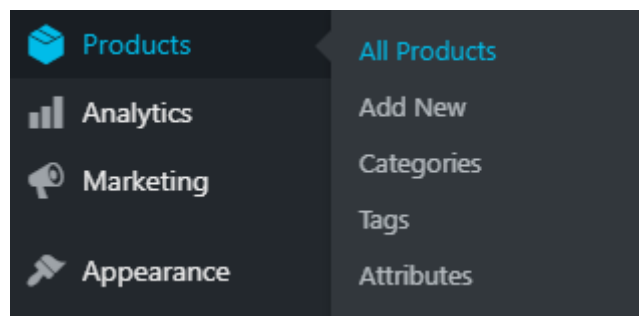
2.) Here you will see different extensions that you can install to your website, some Extensions cannot be installed unless you paid for it.






2 Products Tab

2.1 All Products

1.) Go to Products » All Products.

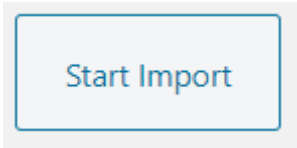


2.) After navigating you will see the display

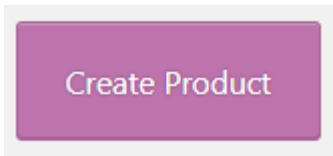
	Name	SKU	Stock
	Joy Dishwashing Liquid	–	In stock
	Name	SKU	Stock

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 Start Import button.

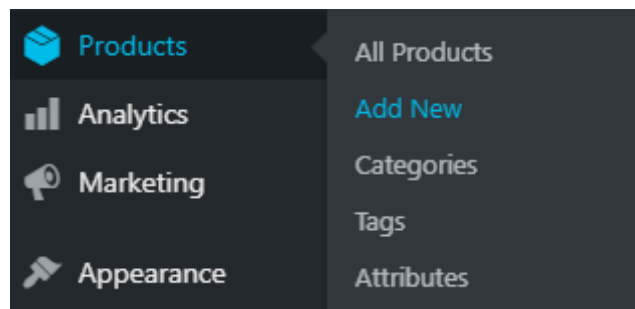
A rectangular button with a light blue border and a light blue background, containing the text "Start Import" in a dark blue font.

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 ▼

B

I

☰

☰

“

☰

☰

☰

🔗

☰

✂

☰


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

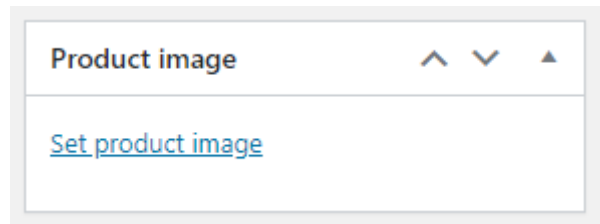
Sale price (£)

 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 dragging or browsing and selecting an image.

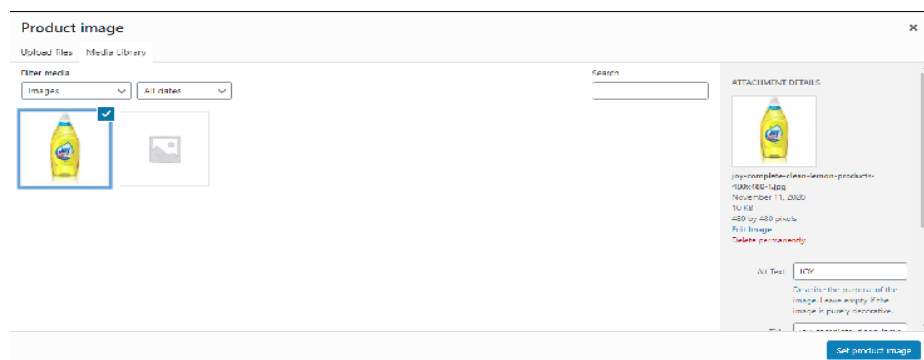
Drop files to upload

or

Select Files

Maximum upload file size: 40 MB.

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

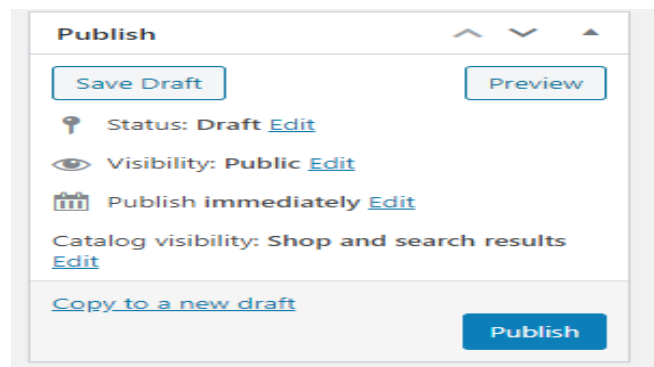


Products

T

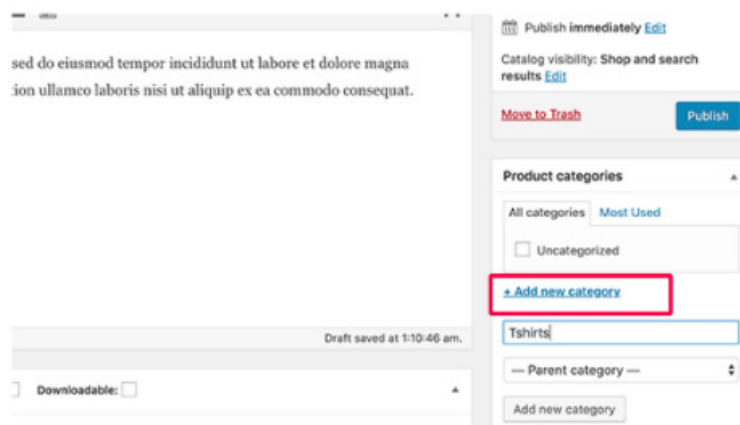
2 Products Tab

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



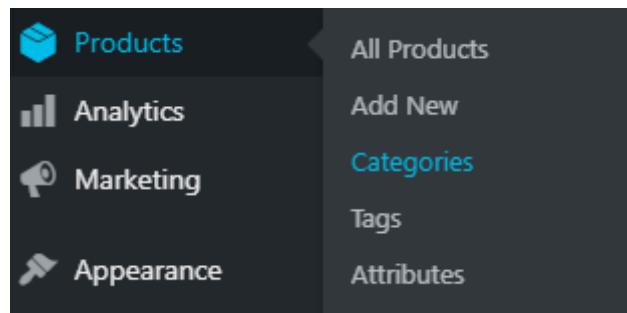
2.3 Categories

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

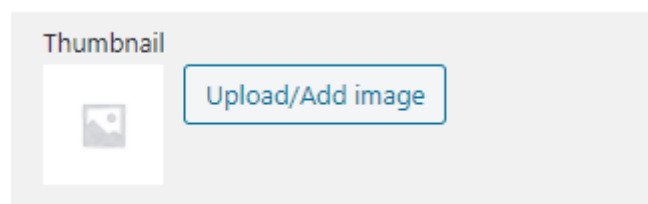
2.) You can also go to Products » Categories.



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.

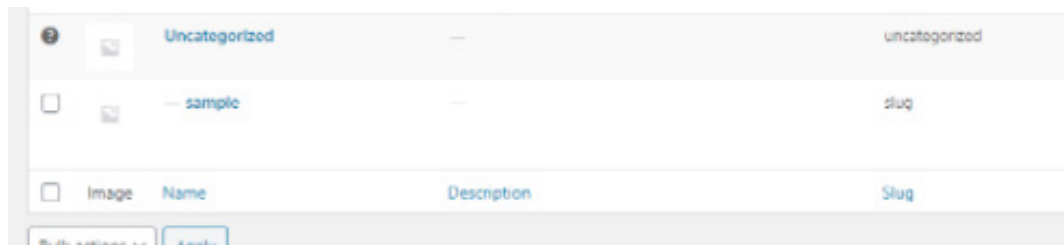


7.) After Clicking the Add new category Button.

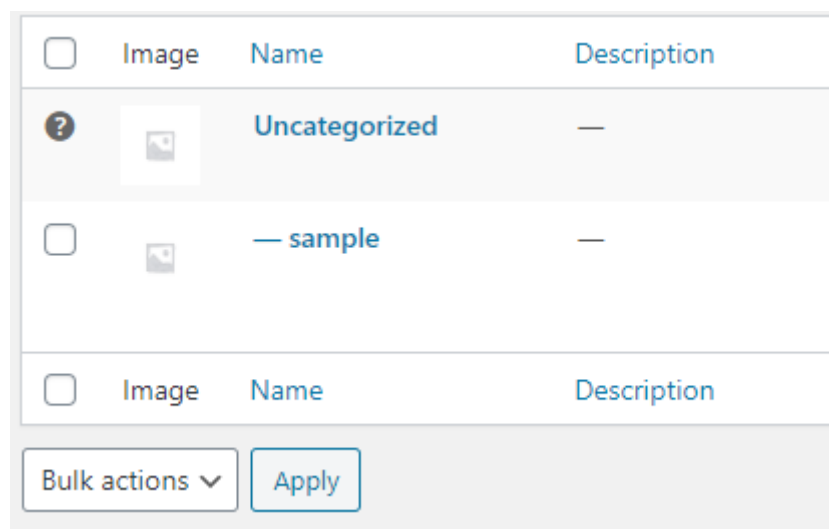
8.) You will see the added category on your top right corner.

2 Products Tab

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



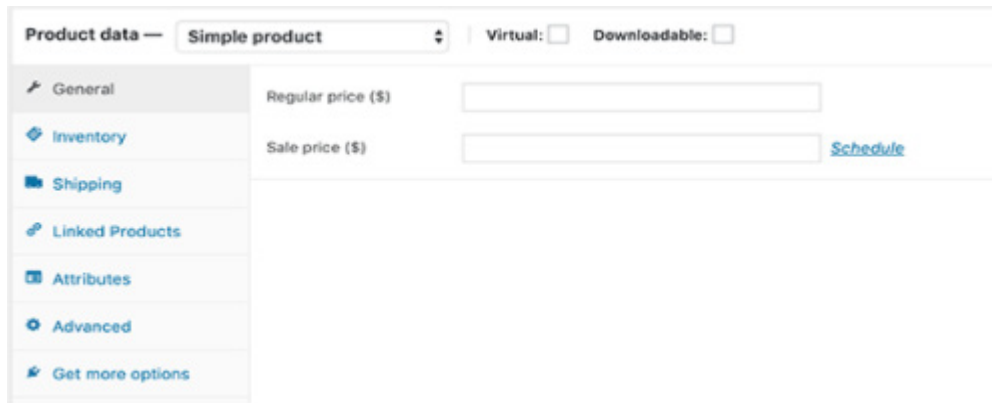
10.) If everything is alright and set, click the Apply button



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

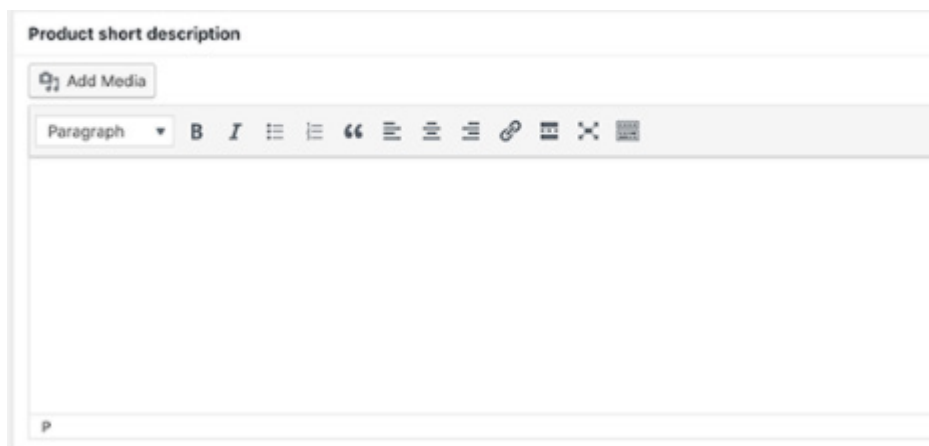
Linked Products

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

-
-

-
-

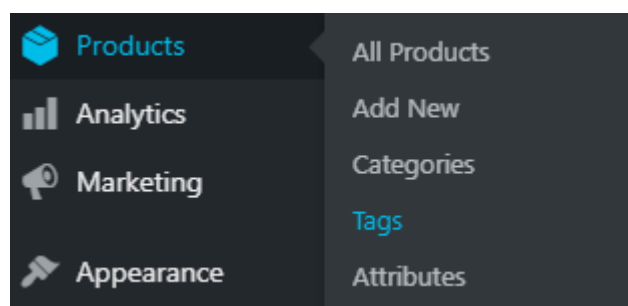
 “ ”

-
-

[Link](#) [Unlink](#) [More](#)

P

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



Products

T

2 Products Tab

4.) Fill up the following forms.

Product tags

Your store does not appear to be using a secure connection, we highly recommend saving your online website over an HTTPS connection to help keep customer data secure. [Learn more here.](#)

Add new tag

Name
The name is how it appears on your site.

Tag
The "slug" is the URL friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.

Description
The description is not prominent by default. However, some themes may show it.

[Add new tag](#)

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

Bulk actions [Apply](#)

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

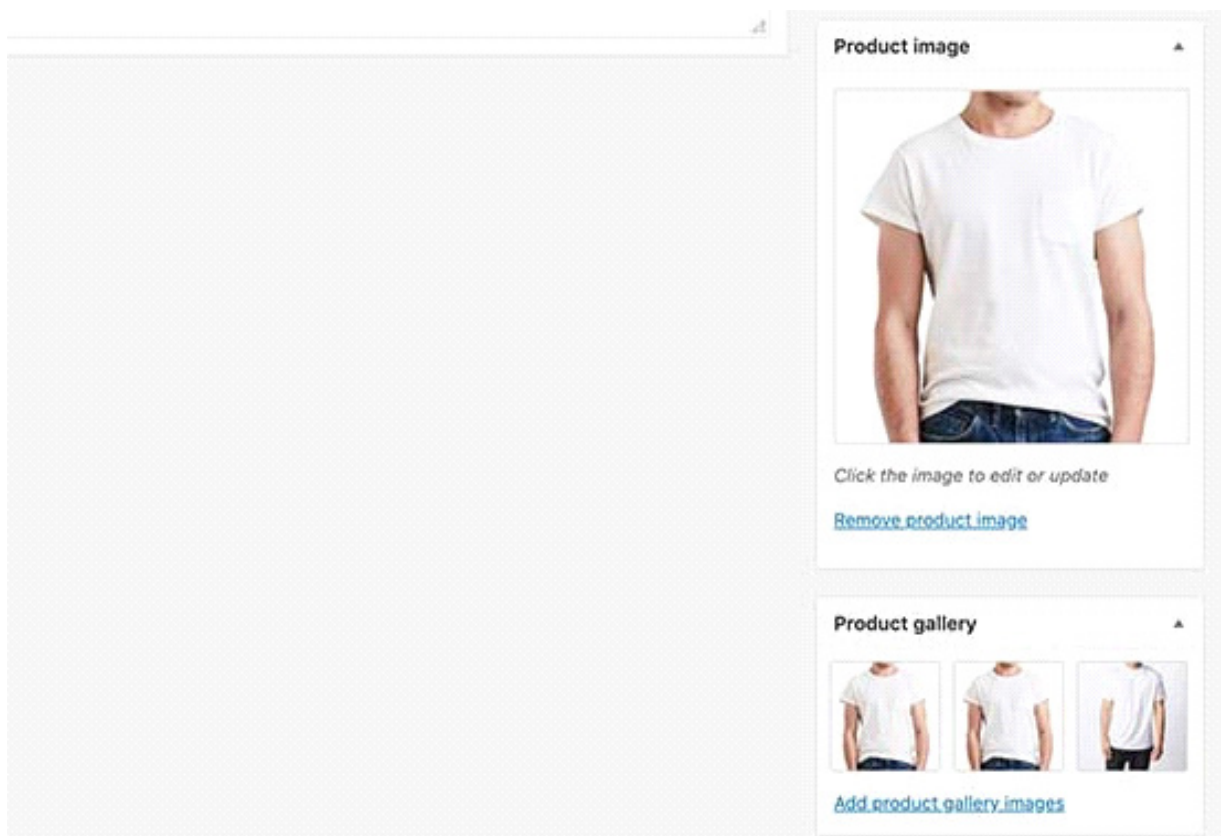
6.) If everything is alright and set, click the Apply button.

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.

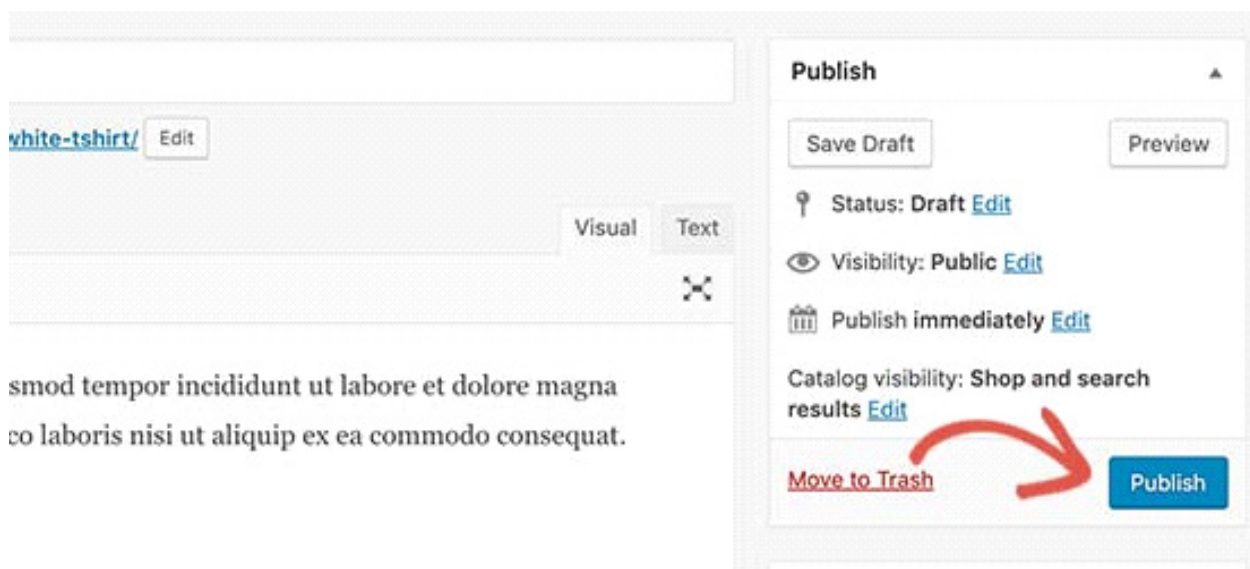


2.) You can add multiple images to create an image gallery of your product.

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 AnalyticsTab

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

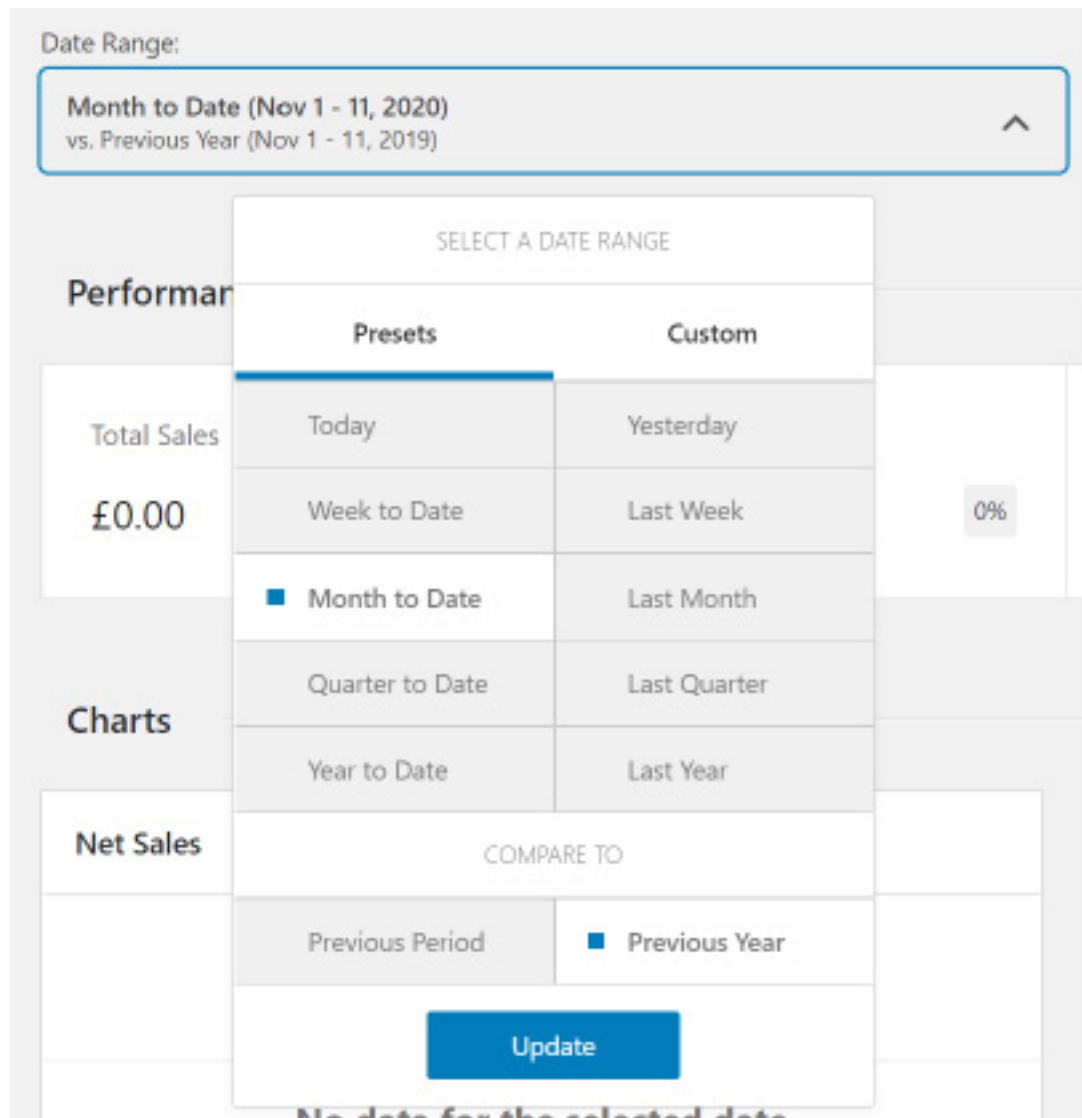
Performance			
Total Sales	Net Sales	Orders	Items Sold
£0.00	£0.00	0	0
0%	0%	0%	

Date Range:

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

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 AnalyticsTab

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

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

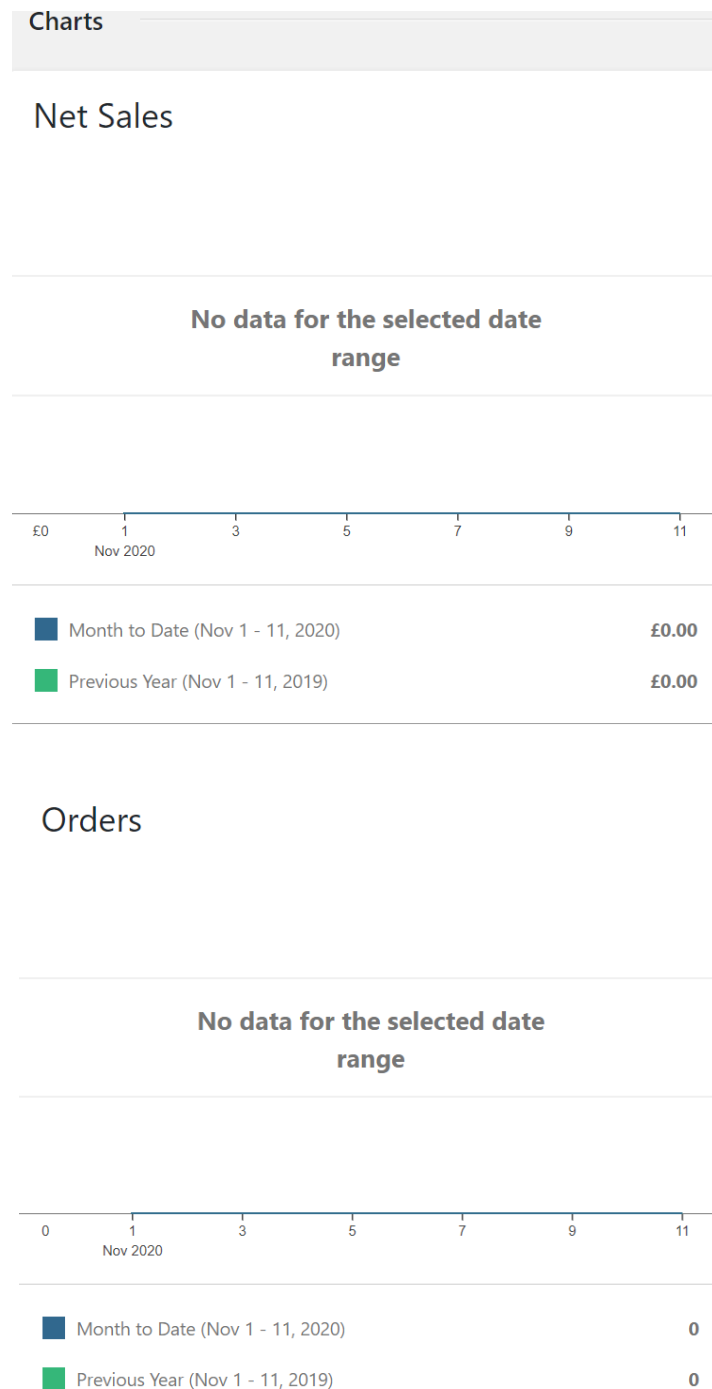
COMPARE TO

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 AnalyticsTab

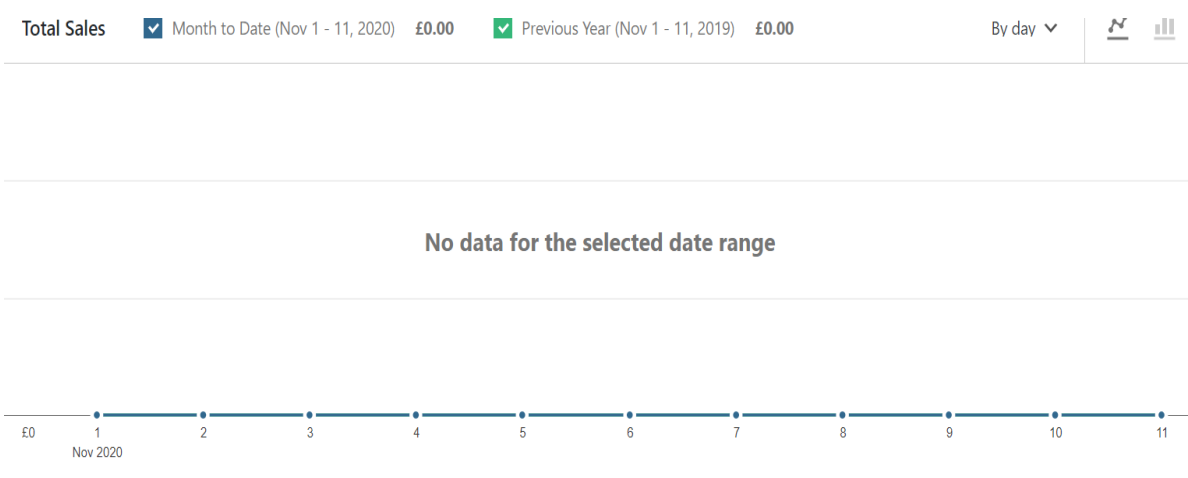
3.1 Overview

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.



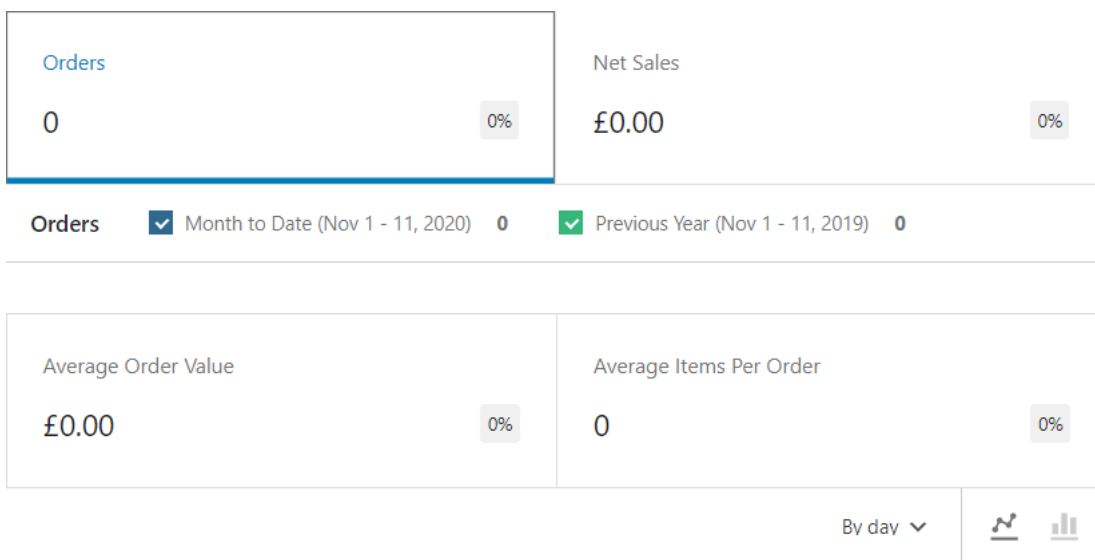
3 AnalyticsTab

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								

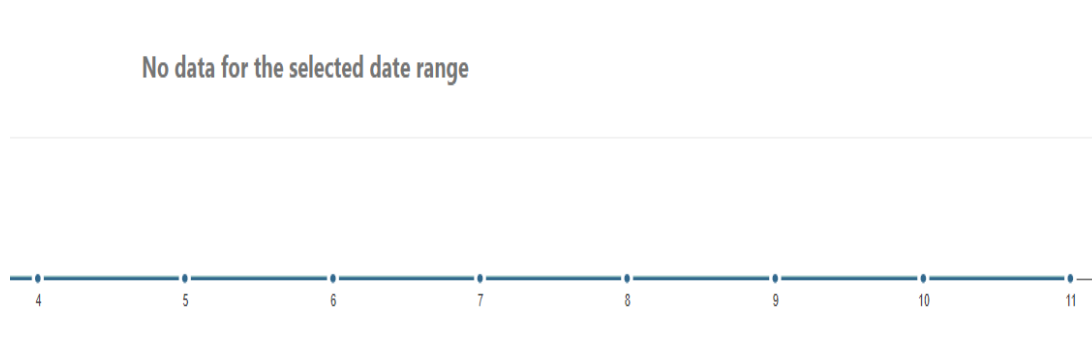
3 Analytics Tab

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 AnalyticsTab

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

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

COMPARE TO

Previous Period

☒ Previous Year

Contact

Contact

United States

Red Fowers Street, New York NYC
+ 878 765 678 87
Peter Johnsson

Europe

Eng Andre Costa, Madrit, Spain
+ 567 876 78 98
Juan Henriques

Canada

Blue Flowers Street, Toronto
+768 876 78 98
Amanda Grey

Rights

Mrs chief great maids these which are ham match she.
Abode to tried do thing maids.
Doubtful disposed returned rejoiced to dashwood is so up.

Situation admitting promotion at or to perceived be. Mr
acuteness we as estimable eher had offence. Did had way
law dinner square tastes



